EUROPEAN UNION
European Regional Development Fund

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

Interreg EXPERIENCE- Social Impact Monitoring: Kent Residents Survey

WAVE 5 - Summer 2022

VISIT KENT BUSINESS GARDEN of ENGLAND

Kent Downs Area of Outstanding Natural Beauty





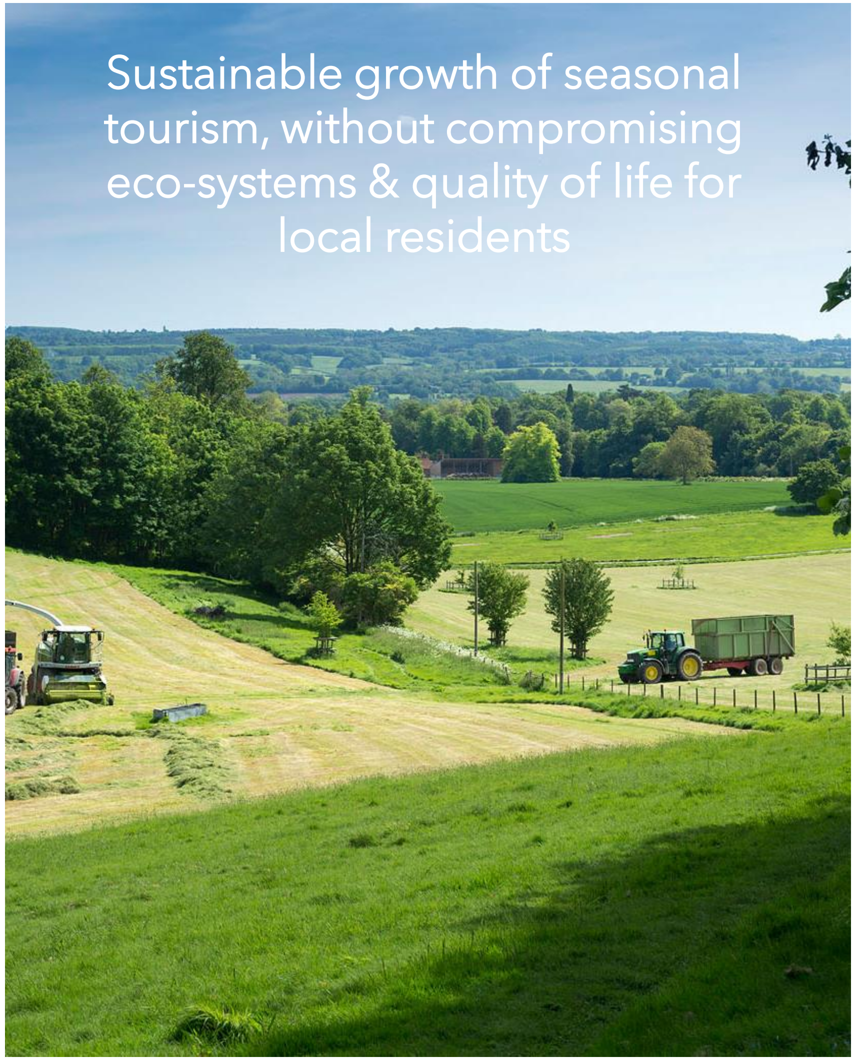

Contents

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. This survey is the fifth wave in a series of surveys that are being completed and it is based on summer tourism in 2022, with the previous wave having been conducted last year, based on winter tourism in 2021/22. 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 fifth wave of data collection, integrating perceptions around the impacts of summer 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 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 summer 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 baseline for future waves, and covered results for all questions, to help create a picture of residents' then current perceptions and of their support for tourism. Subsequently, as previously highlighted, further reports focus on outlining key differences and trends.

Given the unprecedented impact of COVID-19, some of the previous waves aimed to outline and monitor the implications of the pandemic. 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, waves 1-3 segmented questions into a pre and post COVID context, however, as the sector emerged from the pandemic, subsequent waves were 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 added (see green box below), 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 and if they have taken any leisure trips within the county this summer
- Where would residents take/recommend friends and family to visit in their local area and where they have visited this summer in the county
- 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.

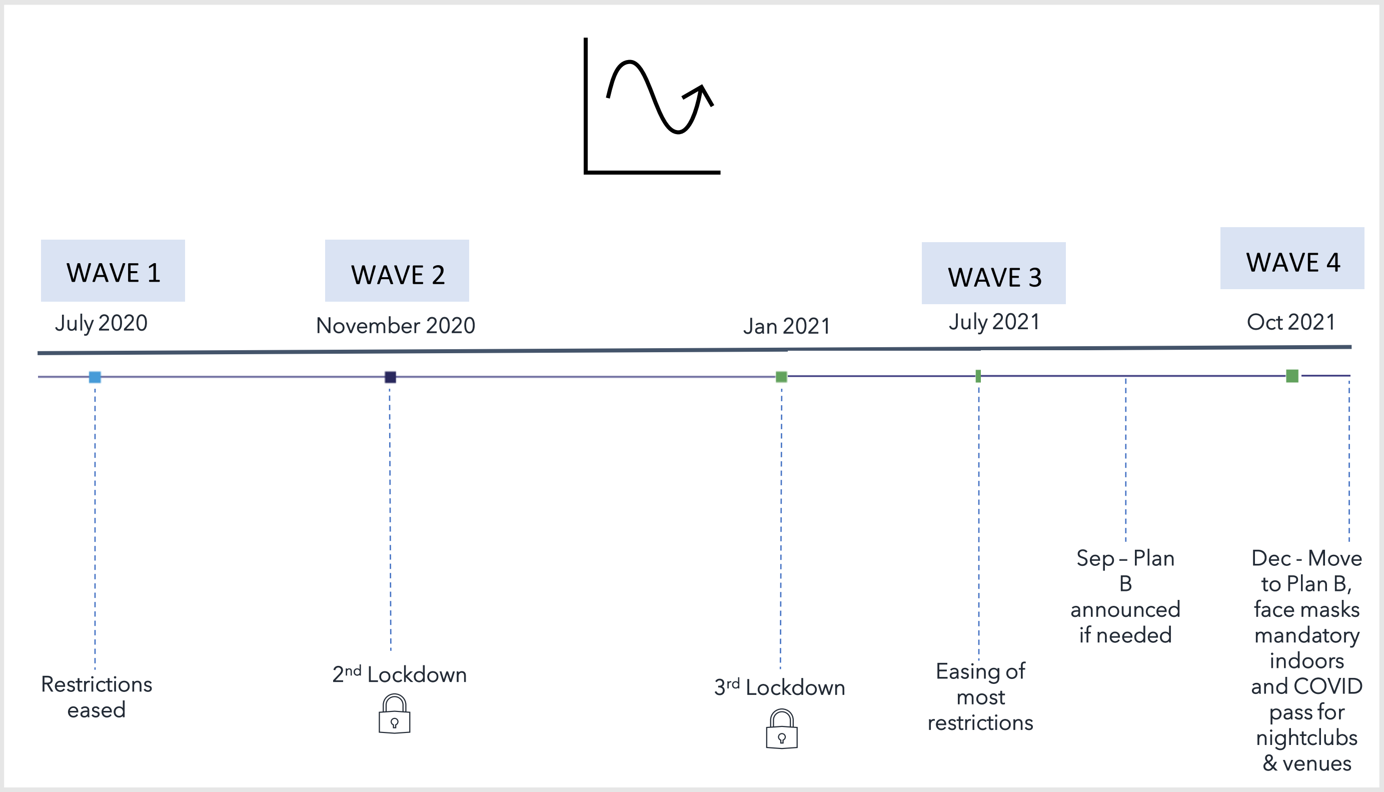


Diagram showing a timeline of survey waves that were impacted by COVID-19 restrictions

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 Research - Wave 5

KEY FINDINGS

This report is based on findings from the fifth wave of the Residents Research, which aimed to gather valuable insights into the perceptions of Kent residents on the impacts of seasonal tourism.

71% Consider their local area to be a tourist destination

89% Agreed with the statement 'I support summer tourism in my local area'

Perceived Main Attraction

- Coast/Beaches 34%
- Museums/Historic sites 28%
- Countryside 16%

935 Kent Residents

Online Survey

Infrastructure

54% Agreed that local infrastructure is improving as a result of tourism

+8% vs. Wave 4

Damage to the Environment

59% Agreed that tourism can cause damage to the natural environment

+5% vs. Wave 4

80% Of residents agreed with the statement 'I live in a beautiful area'

Transport

+13% increase in agreement that local transport services are improving vs. wave 4

In summer 2022
61% took a day trip in Kent
19% took an overnight trip in Kent

54% Of residents observed an increase in footfall vs. winter 21/22

49% will take more day trips & **19%** more overnight stays Kent in 2022/23

46% had friends and relatives to stay in the last 6 months

When working from home...

53% use more local cafes and shops

75% access more outdoor green spaces

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.

05

Wave 5 - Summer 2022

Wave 5 of the survey was sent out to Kent residents in September 2022, to gain an insight into perceptions of summer 2022 tourism on local communities.

Methodology

Data was collected through an online survey aimed at Kent residents via Visit Kent's and partners' resident databases and shared via promoted posts 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 to 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 935 respondents. Furthermore, this provides a robust and fairly 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

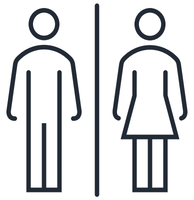
12 minutes to complete

935 Respondents

Sample & Demographics

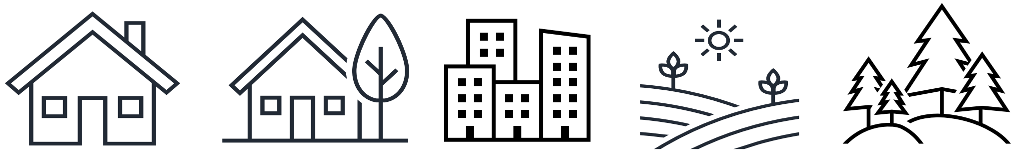
- To create a picture of the sample, respondents were asked various demographic questions. Findings show that the majority of respondents were female and residents aged 35-64 years.
- Residents most commonly stated they live in a town setting (58%), with 46% of all respondents having lived in their area for over 25 years. Findings show that the largest proportion are employed full-time (37%), followed by 30% being retired.
- Overall, demographics mirror the previous wave, however there was a +11% increase in those aged 18-34 compared to wave 4, alongside an +11% increase in male respondents.

Gender (%)



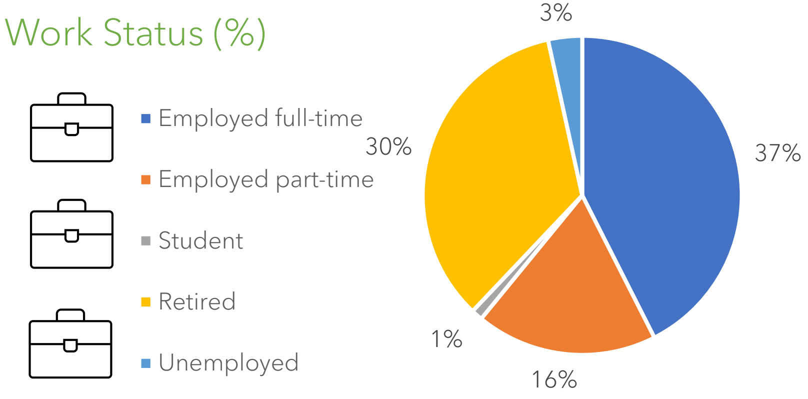
42% **57%**

Area of Residence (%)

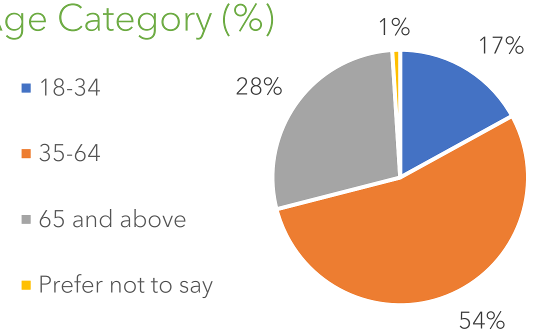


Town	Village	City	KDAONB	Rural
58%	26%	12%	23%	4%

Work Status (%)



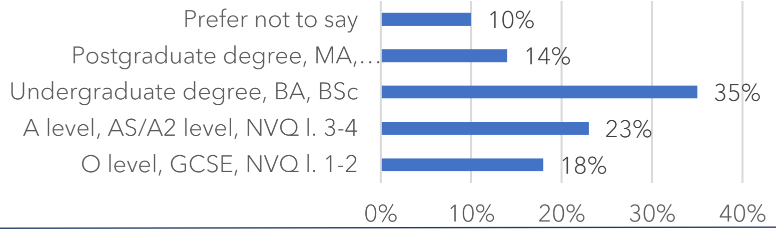
Age Category (%)



Length of Residency (%)

<5yrs	5-25yrs	>25yrs
12%	42%	46%

Education (%)

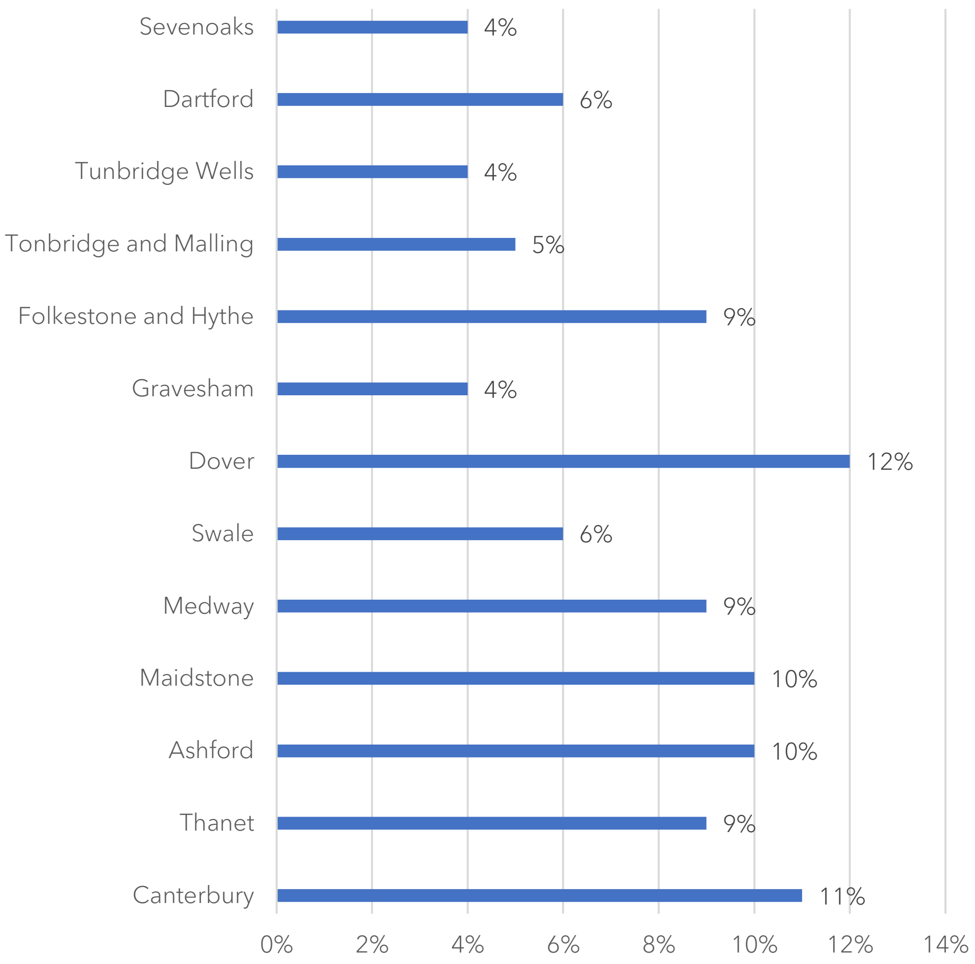


District

- The survey asked respondents to specify which district they live in. As shown in the graph, the largest proportion of residents were located in Dover (12%), followed by those living in Canterbury (11%) and Maidstone and Ashford (both 10%).

- The proportion of respondents located in each district does 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 the previous wave, sample sizes of residents in each district will differ.

District of Residency (%)



Tourism Industry Involvement

- Findings show that 18% of residents stated that a household member was working in the tourism industry at the time of data collection.

- Results for this wave show an increase of +9% in the number of residents stating someone in their household works within the sector compared to wave 4.

Does anyone in your household work in the tourism industry?

Yes 18%

No 82%

KENT RESIDENTS SURVEY FINDINGS

IMPACT AND BENEFITS OF TOURISM

Impact of Summer Tourism

The survey was broken down into various sections, the first of which looked at the perceived impact and potential benefits of summer 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.

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.

- Residents were more likely to agree that tourism reduces their ability to access local services and facilities, compared to wave 4, with this also being the highest level of agreement seen thus far. When looking at this trend overtime, results indicate that residents are more likely to agree with this statement in the summer period since wave 2 (waves 3&5).

- Results show a **+10%** increase in agreement that tourism increases prices locally, which has seen a steady increase, with the exception of a decrease registered in wave 4. Overall, this is likely reflective of the sentiment around the cost of living crisis, including the increase in interest rates and electricity bills, and demonstrates that many residents are worried about financial challenges.

- Wave 5 shows an increase in agreement that there are too many visitors in residents' local areas, up **+12%** vs. the previous wave. Furthermore, looking at waves post-COVID restrictions, residents seem to be more likely to feel the impact of increased footfall in the peak summer months.

Residents were more likely to feel that there are too many visitors in their local area

Agreement

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5
Tourism reduces my ability to access local services and facilities	23%	25%	30% ⇧	25% ⇩	36% ⇧
Tourism increases prices for local services and amenities	45%	47%	52% ⇧	47% ⇩	57% ⇧
There are too many visitors in my local area	16%	22%	18% ⇩	15% ⇩	27% ⇧

- Wave 5 shows a **+13%** increase in agreement that transport services are improving locally and across each wave there is a positive trend in local perceptions surrounding this. Consequently, this may indicate that residents are acknowledging initiatives to develop local transport connections and projects.

- Similarly to wave 4, results also show an increase in positive perceptions of tourism's impact on improving local infrastructure **(+8%)** compared to wave 4, 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 **+5%** increase in agreement that tourism increases employment opportunities, compared to wave 4, in line with the earlier finding that more household members work in tourism.

- Overall, sentiment surrounding employment has seen a steady level of support among residents, representing a key benefit of tourism in the minds of communities. This also may demonstrate further signs of recovery of the sector following the pandemic.

Agreement

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5
Local transport services are improving	8%	9% ↑	13% ↑	23% ↑	36% ↑
Local infrastructure is improving (e.g. public toilets, car parks, playgrounds, footpaths, cycle paths)	17%	19% ↑	20% ↑	46% ↑	54% ↑
Tourism increases employment opportunities	92%	79% ↓	88% ↑	85% ↓	90% ↑

Impact on the Natural Environment

- Findings show a +5% increase in agreement that tourism is harmful to the environment, with 59% agreeing with this statement. When looking at this trend over time, although there was a sharper increase in wave 2, since then sentiment has been more stable. However, since wave 2 agreement has been higher in the summer waves, as a result of higher summer visitor numbers.
- Results also show that agreement that tourism helps to protect the environment is consistent with figures seen in wave 4, although this is still slightly behind the level of agreement seen in wave 1.

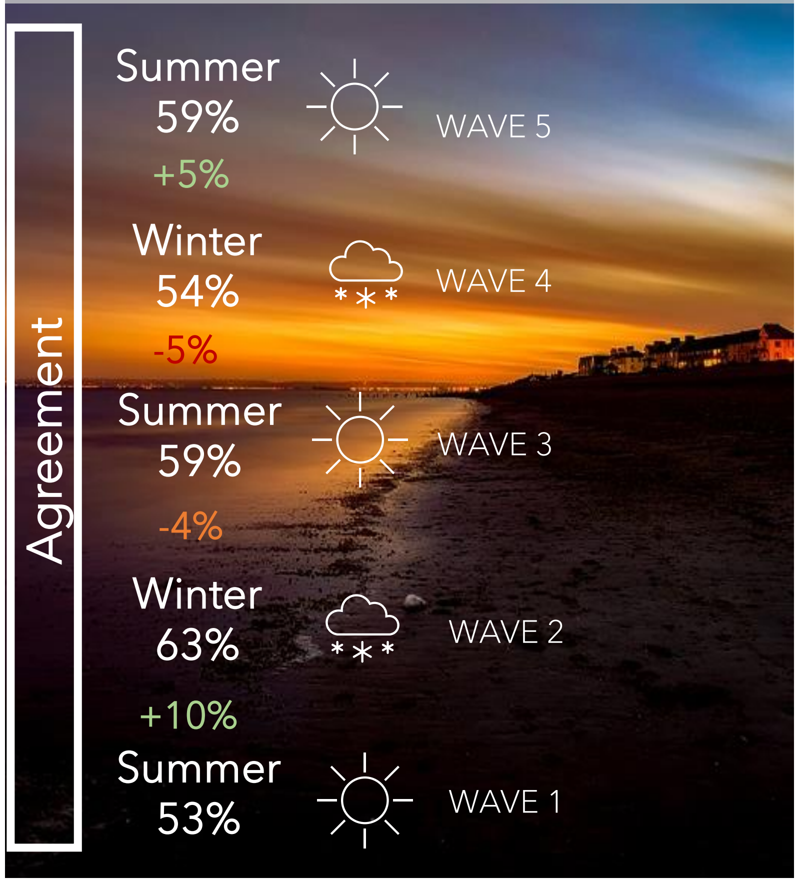
Tourism protects and enhances the natural environment - Agreement (%)

WAVE 1	WAVE 2	WAVE 3	WAVE 4	WAVE 5
55%	51%	45%	49%	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.

'Tourism is harmful to natural places like the countryside or coast'



Age Catergory

- Younger residents aged 18-34 were more likely to agree that there are too many visitors in their local area compared to all respondents (61% vs. 27%).
- Residents aged 18-34 were also more likely to agree that tourism helps to enhance and protect the natural environment compared to all respondents (65% vs. 49%). This sentiment may demonstrate that currently the younger demographic are more aware of the role tourism can play in helping to mitigate the impact on the environment. Furthermore, this may show justification to increase the awareness of such activities among the older age brackets.
- In terms of employment opportunities, results show that this is seen most positively by those aged 18-34 years, compared to all respondents (99% vs. 90%). Although sentiment was positive among each age group, this highlights that tourism's contribution to the job market is seen as a key benefit to the younger demographic who may also be looking to enter the job market.

Location

- Residents living in a city agreed more so compared to all respondents that there are too many visitors in their local area (58% vs. 27%).
- Those residing in a city were also more likely to agree that local infrastructure is improving as a result of tourism (76% vs. 54%), compared to all respondents. Those living in a village setting were least likely to agree with this, with agreement being below Kent average results (45% vs. 54%).
- Residents living in a city were also more likely to agree that transport services are improving as a result of tourism (68% vs. 36%), likely due to these services being more frequent and easily accessible in more built-up areas.

The Kent Downs AONB

- Those living in the Kent Downs AONB were more likely to agree that tourism can be harmful to the natural environment compared to all Kent residents (71% vs. 59%). However, KDAONB residents were also more likely to agree that tourism can help to preserve and enhance the natural environment, compared to all Kent respondents (57% vs. 49%). 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, but in contrast they are also more aware of environmental issues and damage caused by tourism activity.

- KDAONB residents were also more likely to agree that tourism helps to improve local infrastructure including public toilets, foot and cycle paths (71% vs. 54%). This result may demonstrate that KDAONB residents feel positively towards tourism in terms of its ability to act as a catalyst for local improvements. This sentiment may also show recognition of recent ongoing improvements to public footpaths and rights of way.

District

- Residents from Ashford (68%) and Folkestone & Hythe (65%), were more likely to agree that tourism is harmful to the natural environment, compared to all respondents (59%).

- Residents from Medway, Thanet and Sevenoaks (all 86%), followed by Folkestone & Hythe (81%), were more likely than all respondents to be concerned about parking availability (vs. 73%).

- 46% of Ashford residents felt there were too many visitors in their local area, compared to 27% among all residents, closely followed by 42% among residents in Dover.

- Agreement that tourism improves investment was highest in Medway (88%), Folkestone & Hythe (86%) and Dover (85%), compared to all respondents (81%). This may be reflective of a number of these areas having secured national funding to invest in regeneration.

- Compared to all respondents (36%), more residents from Dover (55%), Gravesham (50%) and Ashford (43%), agreed that transport services are improving.

KENT RESIDENTS SURVEY FINDINGS

IMPACT ON WELLBEING & EMOTIONAL CONNECTION

02

Impact of Summer Tourism on Wellbeing & Emotional Connection

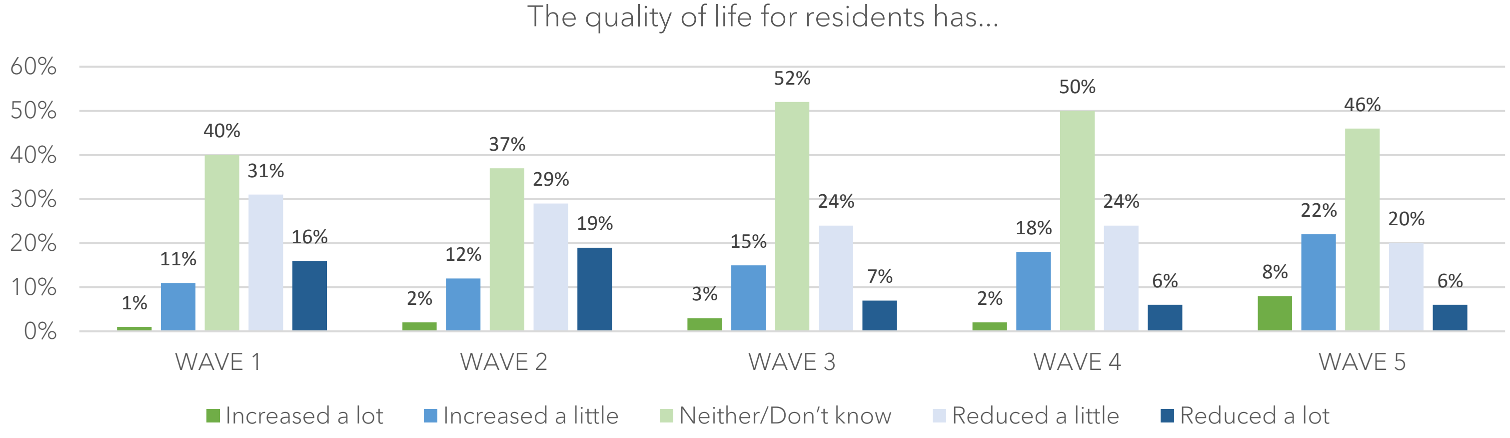
When looking at tourism's impact on residents' wellbeing and emotional connection to their local area, results are fairly consistent with the previous wave.

- Results show a slight decrease of -3% in agreement that residents live in a beautiful area, although a total of 80% still agreed with this.
- Residents were less likely to agree they feel safe in their local area, seeing a decrease of -4% in agreement, vs. wave 4. However, this still represents a significant proportion of residents that did agree with this (78%).
- Wave 5 shows a +7% increase in agreement that having visitors around allows residents to feel more strongly connected to their local area.

	WAVE 1	WAVE 2	WAVE 3	WAVE 4	WAVE 5
I am very satisfied with my life	93%	91%	87%	87%	89%
I live in a beautiful area	82%	86%	80%	83%	80%
My local area is peaceful & calm	69%	70%	63%	66%	67%
Overall, I am happy with my lifestyle	93%	92%	87%	89%	89%
I feel safe in my local area	87%	84%	82%	82%	78%
Summer/winter tourism would not be a reason to move away	85%	85%	80%	84%	86%
Having visitors around me helps me feel more strongly connected to my local area	51%	49%	46%	45%	52%
I dislike living here	6%	9%	7%	8%	15%

- In the previous wave, findings were showing a decline in the number of residents that agreed they feel excited about their future. However, for wave 5 results show an increase of +7% of those agreeing with this statement.
- 74% of residents agreed to some extent that overall they feel calm and relaxed, a slight increase of +2% compared to wave 4.
- In terms of financial security, this is seeing a steady decline, with 70% agreement in wave 5, compared to 82% in wave 1. This ongoing trend may be a reflection of the ongoing rises to the cost of living.
- Looking at the pandemic's impact on tourism and residents' quality of life, overall results show an increase of +10% in the number of residents stating this has increased. This now can also be an indication that the pandemic is in the past for many residents, influencing their views less and less. The largest proportion are continuing to select 'neither/don't know'.

	WAVE 1	WAVE 2	WAVE 3	WAVE 4	WAVE 5
Overall, I feel very excited about my future	70%	75%	65%	63%	70%
Overall, I feel calm and relaxed	72%	77%	71%	72%	74%
I feel financially secure living here	82%	80%	74%	73%	70%
I feel strongly connected to my local area (1-3 MORE CONNECTED)	65%	65%	57%	79%	78%



Graph showing the impact of COVID-19 on quality of life BASE= 935

Age Catergory

- Looking at financial security, residents aged 35-64 felt slightly less stable, compared to all respondents (66% vs.70%). This difference may be reflective of the looming impact of the cost of living crisis and this group potentially consisting of those with younger or older children.
- Looking at quality of life, residents aged 18-34 were more likely to state that this has improved since the pandemic (48% vs. 30%).

The Kent Downs AONB

- Similar to previous waves, findings show that KDAONB residents were more likely to agree that overall they feel calm and relaxed, compared all Kent respondents (84% vs. 74%). This sentiment is also supported by the fact that they are +9% more likely to agree they feel safe in their local area (87% vs. 78%).
- KDAONB residents were also +11% more likely to agree that they live in a beautiful area (91% vs. 80%), alongside 86% agreeing they feel strongly connected to their area, compared to 78% among all respondents.
- Again, findings reiterate that those living in the Kent Downs AONB, are more likely to experience various wellbeing and emotional benefits, which include an increased sense of pride and connection with their local area.

KENT RESIDENTS SURVEY FINDINGS

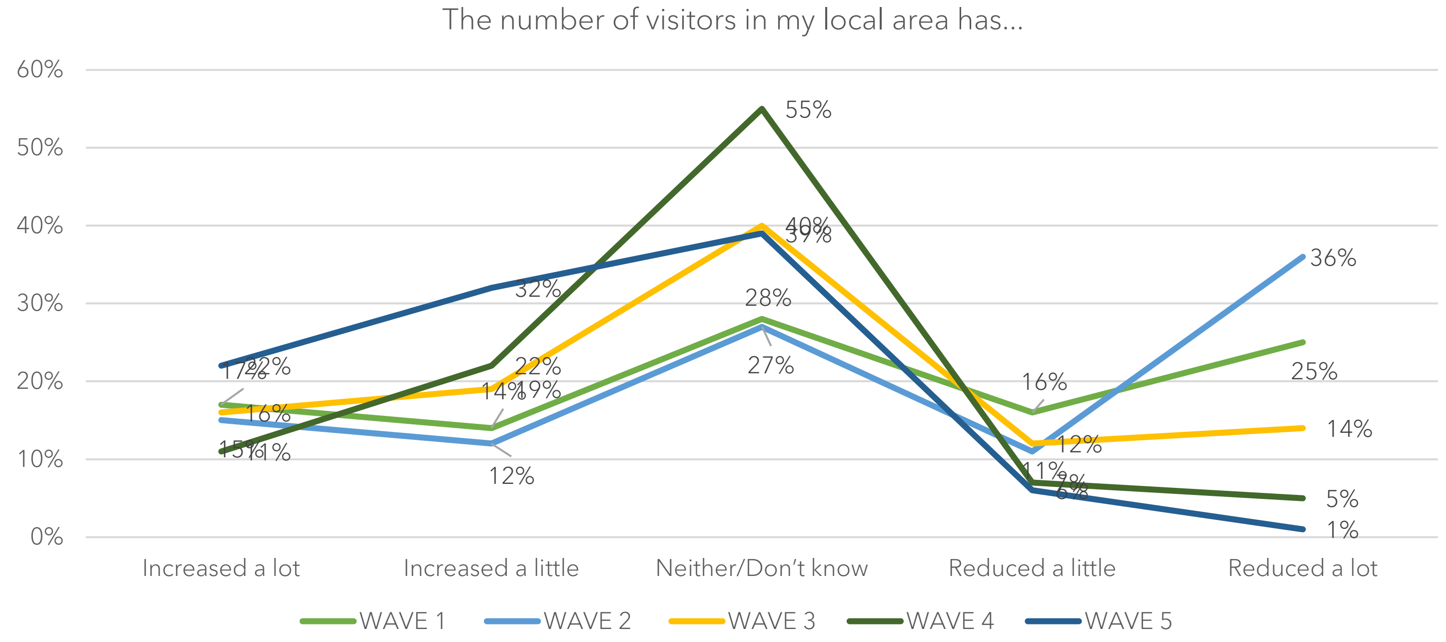
VISITOR FOOTFALL AND LOCAL ENGAGEMENT

Change in Visitor Numbers

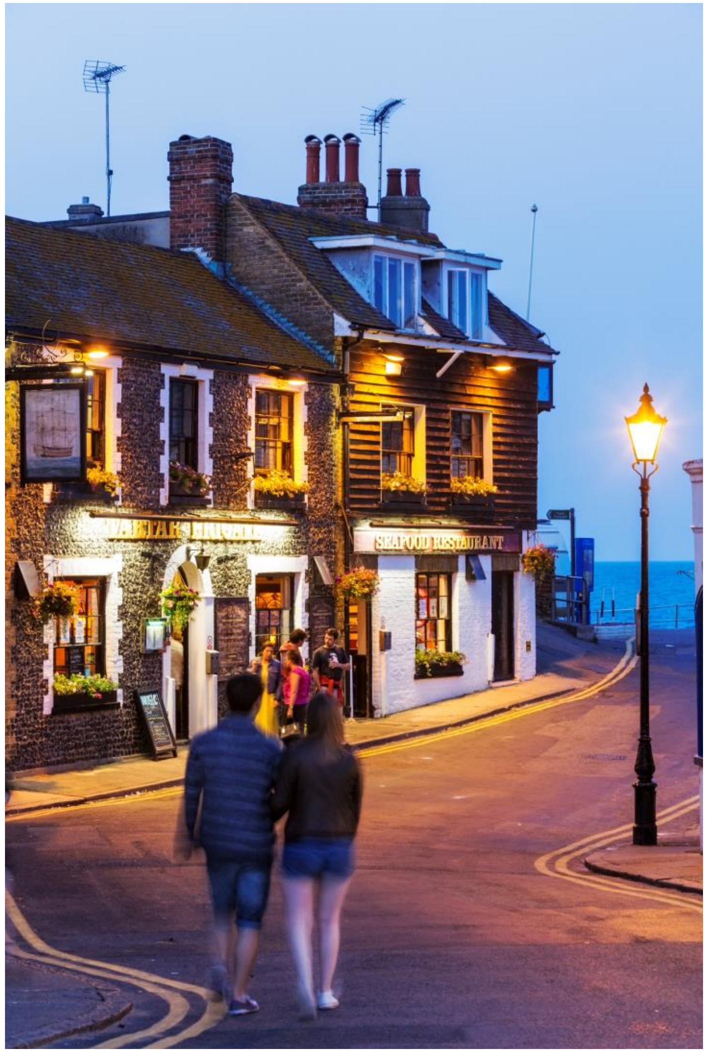
Respondents were asked if they had observed any changes in visitor footfall in their local area during summer 2022 compared to winter 21/22.

- The largest proportion of residents selected 'neither/don't know' (**39%**). However, **54%** specified numbers had increased either a little or a lot, with the remaining **7%** observing a reduction in footfall.

- Overall, results show a **+21%** increase in those observing an increase compared to winter 21/22, with a subsequent decrease in residents stating they observed a decline. When looking at this trend over each wave, residents are more likely to observe an increase in footfall in the summer period compared to winter.

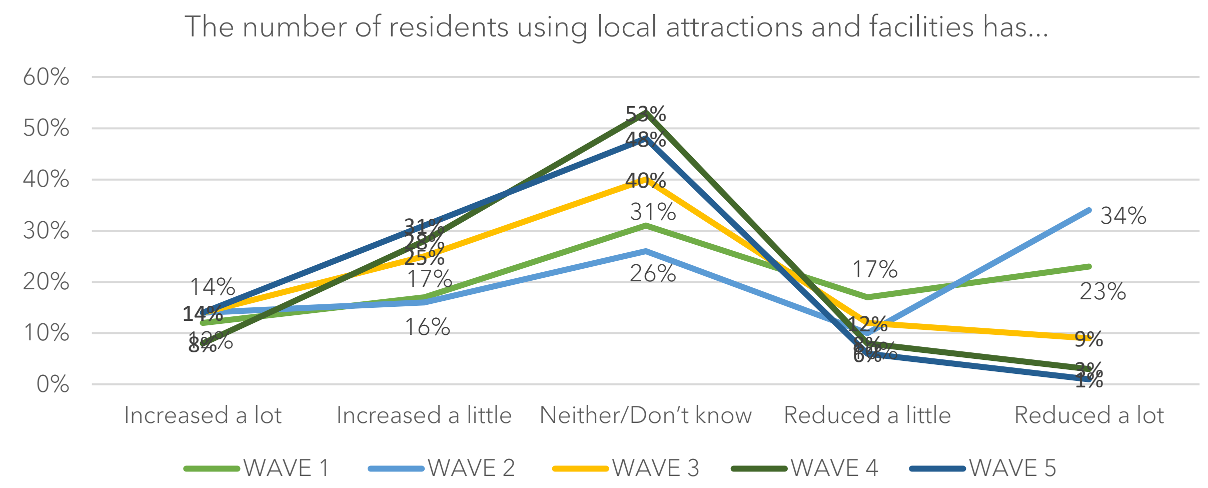


Graph showing changes to visitor footfall BASE= 935

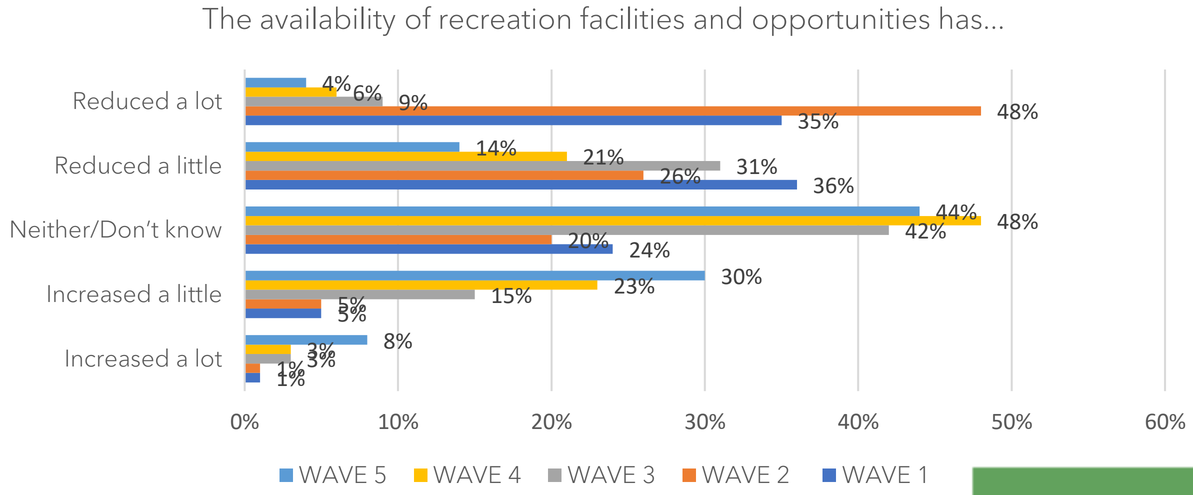


Participation and Availibility

- Wave 5 shows a **+9%** increase in those stating that the number of residents using local attractions and facilities has increased, compared to wave 4.
- A similar pattern was observed when looking at the number of cultural attractions available to visit, with an additional **+21%** specifying cultural attractions available to visit had increased.
- Findings show a **+12%** increase compared to wave 4 that the availability of recreation facilities and opportunities has increased (**38%** vs. **26%**). Overall, agreement that these facilities are increasingly available to residents is steadily improving each wave, indicating further awareness and acknowledgement of these opportunities.
- Moreover, results show a **+26%** increase that during summer 2022 the number of cultural and recreational activities residents took part in increased, with this being the highest so far.
- Alongside an increase in footfall, results show that overall residents feel the availability and their participation in local attractions and facilities are higher in the summer months. This is also particularly prominent when looking at the most recent waves that did not have interference from the COVID-19 pandemic.
- Overall, looking at availability across waves, this may show that residents feel they are not as easily able to access these facilities in the peak season, thus showing justification to improve availability and improve participation in the off-season. Furthermore, it will be important to continue this trend in the final wave and beyond.



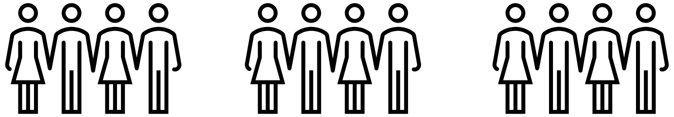
Graph showing the number of residents using local attractions and facilities BASE= 935



Graph showing the availability of recreation facilities and opportunities BASE= 935

Change in Visitor Numbers

- Looking at changes in visitor numbers by area of residence, those living in a city were more likely to have observed an increase in visitor footfall in summer 2022, compared to all respondents (69% vs. 54%).
- This was then followed by residents living in a rural setting (63% vs. 54%).
- Looking at visitor footfall changes geographically, residents living in Folkestone & Hythe were most likely to have observed an increase in visitors (74%) in summer 2022.
- This was then followed by those in Canterbury (71%), Thanet (69%) and Dover (65%).
- Looking at footfall increase geographically, findings may also demonstrate that coastal areas have observed an increase in footfall. This may also be due to residents living in Canterbury identifying themselves as living within the city, however the district as a whole also consists of coastal areas



KENT RESIDENTS SURVEY FINDINGS

WORKING PATTERNS AND ENGAGEMENT WITH LOCAL FACILITIES

04

Working Patterns and Engagement with Local Facilities

Respondents were asked to specify what best describes their working patterns 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 23% 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 10% of residents have always worked from home, with 11% having already began working in a hybrid way prior to COVID-19. 17% 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. Findings also demonstrate the growing adoption of hybrid working measures among organisations. However, compared to wave 4, results show a decline of -7% in those working in a hybrid way and an increase of +10% in those returning to the office full-time.

Looking at the following statements, which one best describes your working patterns considering the COVID-19 pandemic?	WAVE 4	WAVE 5
I have always travelled to work, and I have continued to do so over the pandemic	36%	36%
I have always worked from home	12%	10%
Since the pandemic, my organisation introduced working from home measures, but I have now returned to the workplace full-time	7%	17%
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%	23%
Prior to the pandemic, I had already began working in a more hybrid way (for example working from home on certain days)	8%	11%
Other	6%	3%

Results show that a higher proportion of residents aged 18-34 stated that since the pandemic they have now began hybrid working measures (31% vs. 23%), compared to all respondents.

Engagement with Local Facilities

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

- Looking at engagement with local cafes and shops, **53%** of residents agreed with this statement, an increase of **+10%** vs. wave 4.
- Similar to the previous wave, engagement with outdoor green spaces for walks and cycling was much higher, with **75%** of respondents agreeing they use these more frequently when working from home.
- Although engagement with local amenities is higher, this difference in agreement may also be due to factors such as using green spaces for wellbeing purposes, and these being free to access.

WAVE 4

WAVE 5

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

	Wave 4	Wave 5
Agree	43%	53%
Disagree	43%	34%

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

	Wave 4	Wave 5
Agree	69%	75%
Disagree	31%	18%

- Similarly to wave 4, KDAONB residents were more likely to use both local cafes and shops (**77%** vs. **53%**) and green spaces (**81%** vs. **75%**), compared to all respondents. Again, this may illustrate that those living in this area have easier access to outdoor areas in their locality.
- Mirroring wave 4 findings, residents living in a town or city were more likely to use local cafes and shops (**58% & 54%**). As mentioned in the previous wave, this may be due to being in closer proximity to these outlets, compared to more rural areas. Findings also show that this reduced to **33%** for those living in rural areas and **39%** in villages.
- However, those in rural areas were more likely to engage with green spaces when working from home (**83%** vs. **75%**), which are more easily accessible in these locations, with this also being the case for those living in a village setting (**76%**).

KENT RESIDENTS SURVEY FINDINGS

RESIDENT TRAVEL BEHAVIOUR AND PERCEPTIONS

Resident Travel Behaviour and Perceptions

This section aims to gain an insight into resident leisure travel behaviour and perceptions of the county as a tourist destination. Insights gained will also help to further develop the hyper-local market segment.

Tourist Destination

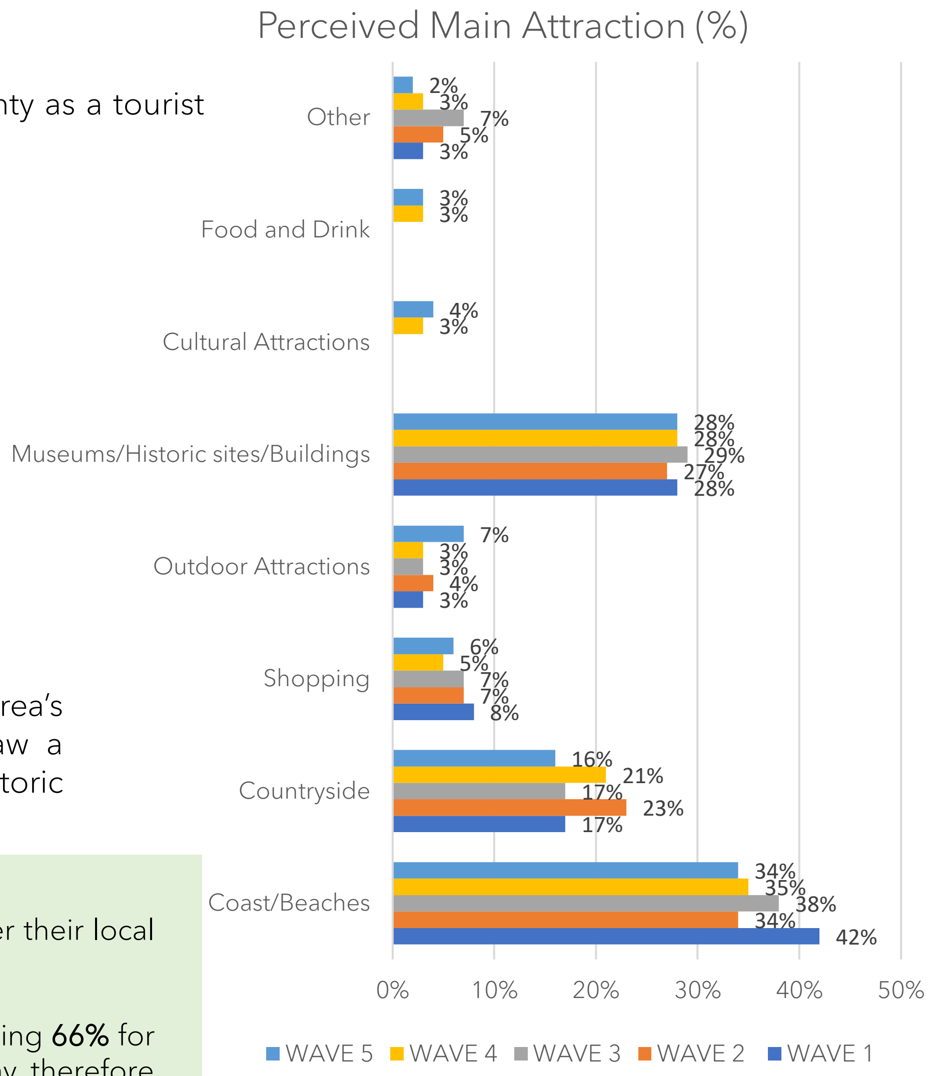
- **71%** of residents agreed that they consider their local area to be a tourist destination, on par with wave 4. Overall, this demonstrates that residents may perceive the county as a leisure day trip or staycation destination.

Do you consider your local area as a tourist destination?

WAVE 1	WAVE 2	WAVE 3	WAVE 4	WAVE 5
Yes 67%	Yes 65%	Yes 63%	Yes 72%	Yes 71%

Main Attraction

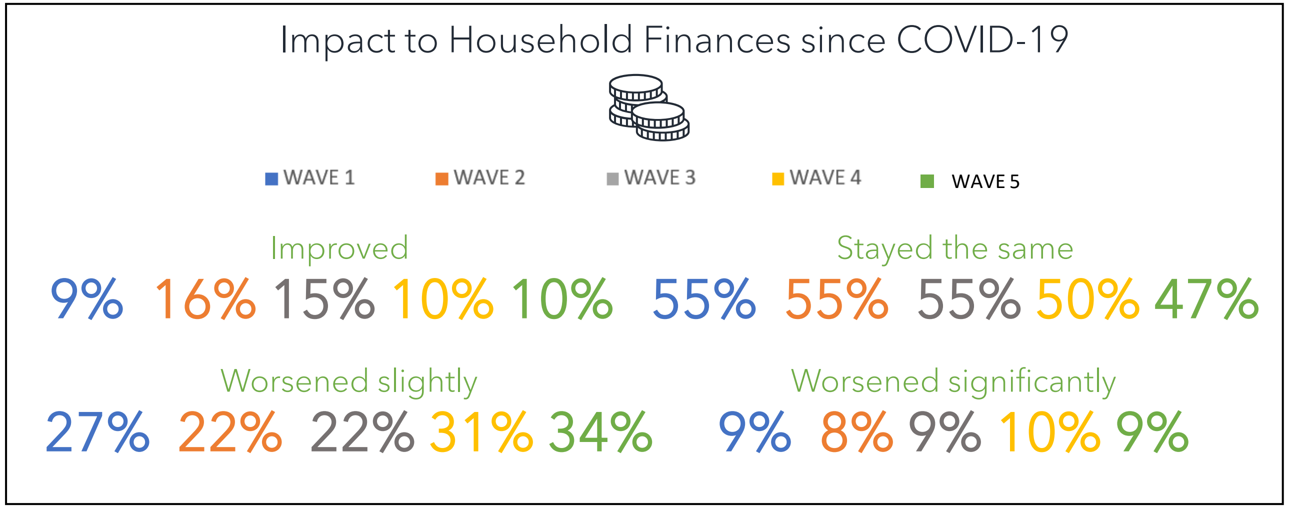
- As with previous waves, the largest proportion of residents perceived the coast/beaches as their area's main attraction (**34%**), followed by heritage attractions (**28%**) and countryside (**16%**), which saw a decrease of **-5%** compared to wave 4. Overall, these results illustrate the strength of Kent's rural, historic and coastal offering in the minds of residents.



- Similar to the previous wave, residents in the KDAONB were more likely than all respondents to consider their local area as a tourist destination (**78%** vs. **71%**), which highlights the appeal of the area for leisure.
- Residents aged 65+ were more likely to consider their area to be a tourist destination (**78%**), with this being **66%** for residents aged 18-34 and **69%** for those aged 35-64. Overall, this indicates that all age groups may therefore consider areas in Kent for leisure, with this being particularly so among the older demographic.

Financial Impact of COVID-19 on Household

- The largest proportion (**47%**) of residents stated their household finances had 'stayed the same', followed by **34%** selecting 'worsened slightly' and 'worsened significantly', and 'improved' (**9%** & **10%** retrospectively). Results are fairly consistent compared to wave 4, albeit a minor increase of **+2%** stating household finances had worsened vs. wave 4.

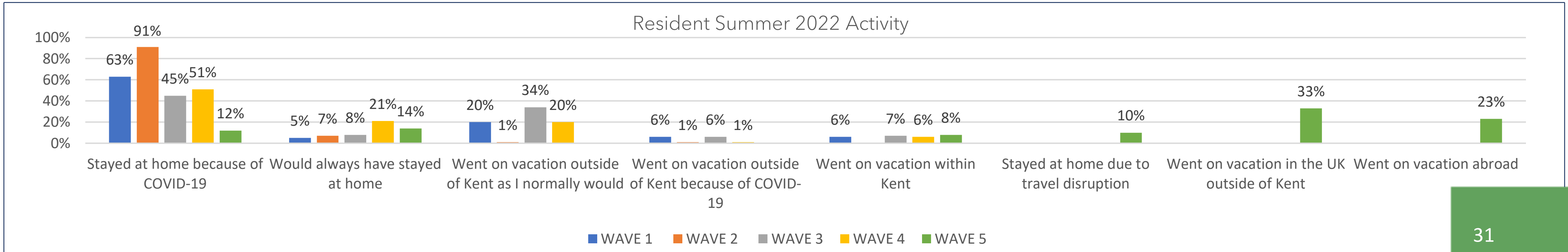


Summer Activity

- Looking at resident activity in summer 2022, the largest proportion (**33%**) went on a trip in the UK outside of Kent, followed by **23%** travelling abroad. Results show a significant shift compared to previous waves, with only **12%** staying at home because of COVID-19.

- Findings show that **8%** of residents went on leisure trips within the county, and together with previous results show an appetite for leisure trips closer to home and domestically. Furthermore, this may also be further driven by the cost of living crisis, with people looking to spend less but still have memorable travel experiences.

- As shown in the graph below, for wave 5 options were adapted, this included the addition of 'stayed at home due to travel disruption', with **10%** of residents selecting this.

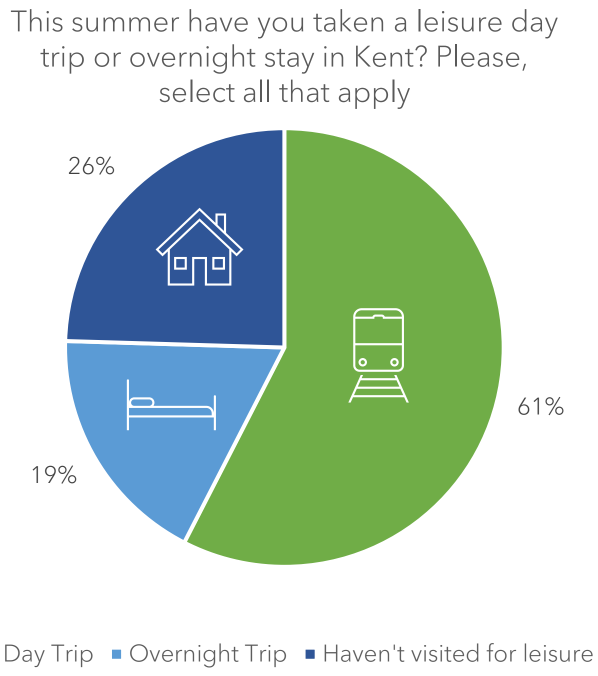


Graph showing Kent resident activity in summer 2022 BASE= 935

Summer Leisure Trips

- In order to gain a deeper insight into residents' leisure travel behaviour locally, additional questions were added to the survey.

- Firstly, residents were asked if in summer 2022 they had taken a leisure trip in Kent, either for the day or overnight. As shown in the pie chart below, findings show that the majority of residents had taken a day trip (**61%**). This was then followed by **26%** who stated they haven't visited the county for leisure and **19%** who had taken an overnight trip.



The survey then presented residents with a series of experiences and activities, and asked them to specify if they had participated in any this summer.

- 44% of residents most commonly selected 'shopping', closely followed by 'events & festivals' (43%). These were then followed by heritage experiences/attractions (41%) and 'museums & galleries' (38%).

- When looking at the top selected activities, results illustrate the strong interest and importance of retail, events and heritage among the hyper-local market.

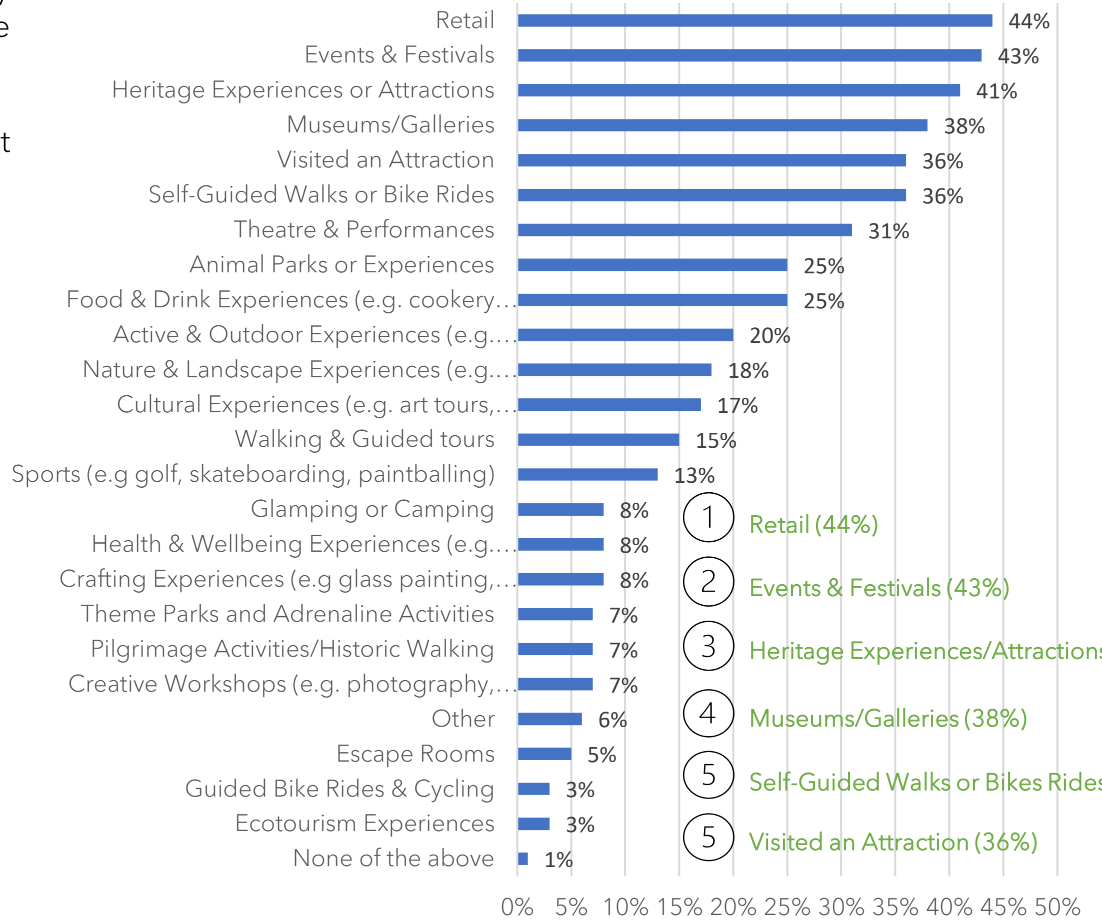
- In terms of other activities/experiences selected, findings show the prominence of self-guided walks and bike rides (36%). This demonstrates a strong interest in active travel and use of green spaces, alongside an opportunity to promote more outdoor spaces locally. And as expected, visiting a visitor attraction also came out strongly, selected by 36% of respondents.

- In terms of more experiential activities, residents engaged more so with theatre & performances (31%), food & drink experiences, including cookery classes and brewery tours, animal parks or experiences (both 25%), alongside active & outdoor experiences such as canoeing or archery (20%).

- The latter findings also reinforce insights from the Visit Kent Perception Research Study, which showed an increased interest in food & drink and outdoor-based experiences.

- These insights will be key in helping to further develop hyper-local market insights and position local experiences and attractions among the local audience.

Which of the following, if any, experiences or activities in Kent have you participated in this summer? Please select all that apply



1 Retail (44%)

2 Events & Festivals (43%)

3 Heritage Experiences/Attractions (41%)

4 Museums/Galleries (38%)

5 Self-Guided Walks or Bikes Rides (36%)

5 Visited an Attraction (36%)

The survey then asked respondents to provide any additional information based on their visits to experiences or attractions, including who they visited with, where this was and what was involved, based on their responses to the previous question.

- Looking at responses provided, residents were most likely to have visited locally with their partner, followed by those travelling with family or children and friends.

- Mirroring previous results around VRF visits, residents most commonly visited heritage attractions, including Leeds Castle, Dover Castle, and other English Heritage and National Trust properties. Other attractions commonly cited included, The Historic Dockyard, Chatham and Rochester Cathedral.

- The coastal offering emerged strongly, including coastal towns such as Herne Bay and Folkestone, with mentions of the Creative Quarter and the Harbour Arm. This also included mentions of the seaside, blue flag beaches and the White Cliffs.

- Summer visits also consisted of walking and cycling, visits to wildlife parks including Port Lympne Hotel and Reserve and Wingham Wildlife Park, in addition to various events and festivals and water-based activities.

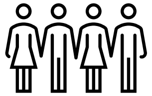
VFR Visits

- Results show that 46% of residents have had friends and relatives to stay with them in the last 6 months for leisure purposes.

- This therefore indicates that a significant proportion of respondents have taken VFR leisure visits within the country, and demonstrates an ongoing opportunity to integrate this market further into the hyper-local audience and marketing comms and campaigns.

- Compared to wave 4, the proportion of residents who have had friends and relatives to stay in the last six months for leisure purposes saw a +12% increase. This could indicate that people are looking for more closer to home visits and stay with friends and relatives as a more cost effective accommodation option.

- Findings also mirror results from wave 4 that residents living in the KDAONB were more likely to have had VFR visits (62%). This perhaps highlights the appeal of the KDAONB area.



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

Yes	No
46%	54%

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.

- Results show a similar picture to the previous wave, with residents most commonly looking to heritage attractions such as castles and museums, with particular attractions such as Leeds and Dover Castle being mentioned. This also included National Trust properties, alongside Canterbury Cathedral, The Historic Dockyard, Chatham and The White Cliffs.

- Similarly to wave 4, the most popular destinations included Canterbury, Dover and Rochester, however Folkestone was more frequently mentioned, which may be due to increased visitation to the Harbour Arm and the seafront area in the summer months.

- Looking at other themes, these included countryside and outdoor areas, the coast, together with the food and drink offering and walking. Furthermore, when comparing this with the previous Winter wave, residents cited a wider variety of outdoor areas including parks, gardens, rivers and vineyards, alongside the coast, which again may be due to the warmer weather.

Attractions

Castles, Museums, Leeds Castle
Dover Castle, National Trust properties,
Canterbury Cathedral
The Historic Dockyard, Chatham
The White Cliffs
Walmer Castle
Wingham Wildlife Park
Rochester Castle
Rochester Cathedral
Sissinghurst Castle, Hever Castle
Railways

Destinations

Canterbury
Dover
Rochester
Folkestone
Whitstable
Broadstairs
Chatham
Deal, Margate, Walmer
Hythe , Ramsgate, Herne Bay
Sandwich , Faversham

Countryside/Outdoors

Parks & Gardens
Nature & Wildlife
Rivers
Vineyards

Coastal

Beaches
The Coast
Coastal towns

Food, Drink & Walking

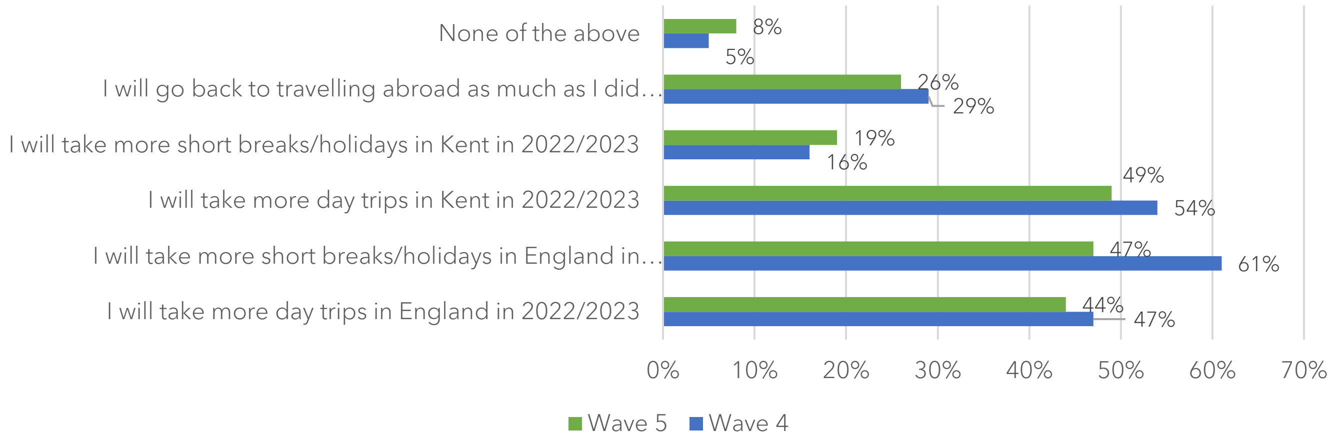
Walking
Pubs
Restaurants

Leisure Travel Behaviour

- **45%** stated they have made short-term changes to their travel behaviour due to the pandemic, followed by **30%** having not changed their behaviour and **25%** who felt that short-term changes will likely influence their plans long-term. Looking at sentiment compared to wave 4, there is a shift away from plans being impacted due to the pandemic, with an increase of **+12%** in those not changing their holiday plans.

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?	WAVE 4	WAVE 5
I have not changed my holiday plans or choices as a result of COVID	18%	30%
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%	45%
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%	25%

Looking to future travel, which of the following statements describes your travel plans?



- Looking to future travel intentions, **47%** of residents stated they will take more short breaks/holidays in England in 2022/23, alongside **19%** in the case of trips within Kent.

- For day trips, this stood at **44%** for England and **49%** for Kent, with **26%** stating they will travel abroad as much as they did prior to the pandemic.

- Overall, results show an appetite for travel, although compared to wave 4 there was a slight decrease in interest in taking trips in England. This may be due to increasing cautiousness around spending, however there is an ongoing opportunity to promote staycations and day trips within Kent, as people will still look to prioritise travel. This is further supported by a slight increase of **+3%** in those interested in taking short breaks in the county.

- Residents living in a city were slightly more likely to state they will take more short-breaks/holidays in Kent during 2022/2023 than all respondents (**24%** vs. **19%**), which may indicate that those living in more built-up areas may look to escape to more rural or coastal destinations to overcrowding. This group were also less likely to want to take day trips in Kent, as they may live in popular day trip areas.
- Residents aged 18-34 also expressed a higher interest in taking short-breaks in Kent compared to all respondents (**24%** vs. **19%**), while residents aged 65+ were more likely to express an interest in taking more day trips in Kent inn 2022/2023.

Sources of Information

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

1. Specific attraction websites (60%)
2. Kent destination websites (52%)
3. Review website e.g. TripAdvisor (45%)

Followed by…

Ask friends & family for recommendations
33%

Landscape or wildlife information site
27%

- Mirroring wave 4, 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

- More likely to have taken an overnight trip in Kent (**23%** vs. **19%**) & more likely to have had VRF visits in the last 6 months (**65%** vs. **46%**).
- More likely to have taken part in experiences based around food & drink, active & outdoors, culture & creative and crafting activities as well as health & wellbeing.
- This group also had a higher level of engagement with escape rooms and guided bike rides & cycling.

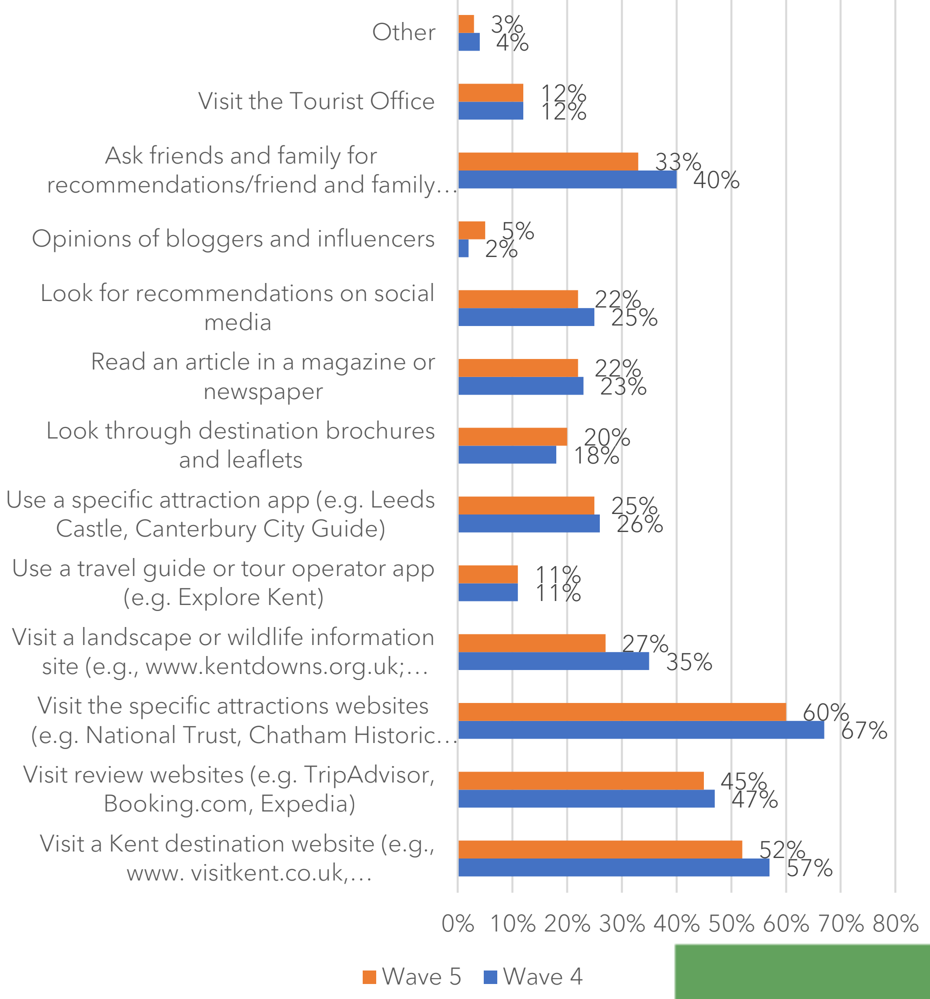
35-64

- More likely to have taken a leisure day trip in Kent in summer 2022 (**66%** vs. **61%**).
- More likely to have visited animal parks and look for animal-based experiences.
- This age group were also more likely to have engaged in retail and events & festivals in summer 2022, compared to all respondents.

65+

- More likely to have visited heritage attractions/experiences and museums and galleries.
- This age group were also more likely to have engaged with – theatre & performances, self-guided walks or bike rides and events & festivals.

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?



KENT RESIDENTS SURVEY FINDINGS

OVERALL SUPPORT OF TOURISM & TOP POSITIVE AND NEGATIVE IMPACTS

Overall Support of Tourism

- Results show that **89%** of residents agreed that they support summer tourism in their local area, a sentiment that has been consistent across each wave.
- Findings show that a significant proportion of residents (**61%**), agreed that working in the tourism and hospitality industry is an attractive career. Previously, this was lower among residents aged 18-34 and those living in rural areas, however for this wave responses among those aged 18-34 saw improvement (**65%**), whereas this was still lower among those living in rural areas (**57%**).
- **76%** of residents stated that the overall impact of tourism on Kent is positive, with **6%** selecting 'negative' and the remaining **18%** selecting 'don't know/neutral'.
- When comparing sentiment around overall impact of tourism with previous waves, this is fairly consistent, although there was a **+4%** increase in the number of residents who agreed they support summer tourism.

Overall impact of tourism on Kent?

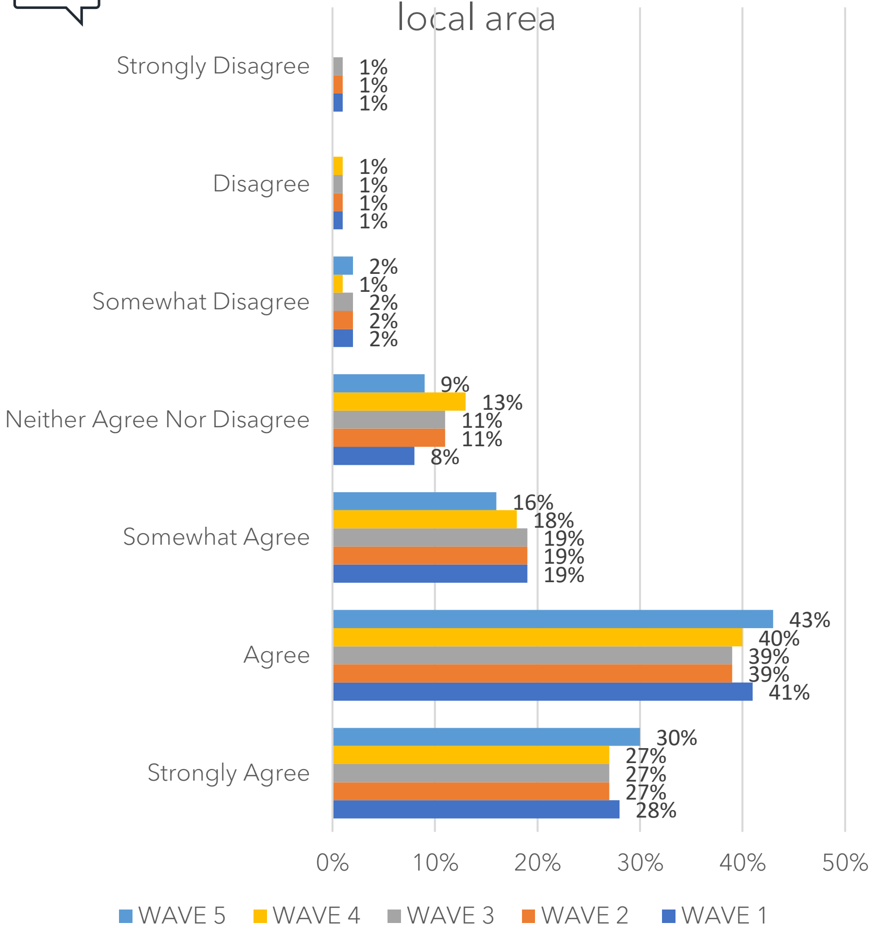
Positive	Negative	Don't Know/Neutral
76%	**6%**	**18%**

BASE= 935

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

Yes	No
61%	39%

Resident support of summer 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= 935

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 below illustrates the most frequently mentioned positive words, indicated by the size of the words displayed.

- As highlighted in previous waves, residents most commonly perceive tourism as having predominantly economic benefits, bringing additional income to the area.
- Similarly to the above, employment opportunities were also commonly mentioned by residents as a positive impact of tourism activity.
- Responses also included that tourism helps to attract investment, helping to improve facilities and infrastructure, alongside generating development and the profile of the area.
- Findings generally indicate that residents feel that tourism helps to keep the area busy and vibrant and overall tourism improves the area.
- The countryside, beaches, castles, restaurants and other historic sites were also mentioned, which may indicate that residents feel that tourism helps to facilitate these and in turn provides places for residents to visit and enjoy.
- 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 traffic were the most commonly cited negative impacts, an aspect that also emerged strongly in previous waves. This response may have also been further impacted by recent traffic disruptions in the county, including Operation Brock.
- Responses show concerns about the increasing damage to the natural environment and local wildlife.
- As with previous waves, residents expressed strong concerns around parking, which has consistently flagged as an issue in each wave of the survey.
- Other aspects that were commonly mentioned included concerns around overcrowding, high costs and house prices, in addition to crime.
- Overall, results do mirror sentiment expressed in previous waves and it is evident that environmental damage and traffic 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 any the answers they gave throughout the survey. The following diagram presents a sample of comments given.

"It's great when an area is regenerated and more vibrant, but is does always come at a cost to locals in terms of rental and property prices, this seems to be the case for the whole of the Kent coast"

"Tourism was way down this year in Folkestone due to Operation Brock hanging over us"

"Due to current housing developments, lack of investment in infrastructure and the state of the roads in Kent travel, especially from South of Kent to the North can be plagued with traffic problems, tourism does effect littering and rubbish all over Kent, however, people visiting the county do support pubs and restaurants, cafe's and other services as well as improvements in visiting historic sites and investments into these"

"I volunteer in a visitor information centre and enjoy assisting visitors, however a lot of litter and waste can be left"

"I would love to see more ticket options for families"

"Locals are proud of where they live and want it to look its best – we need litter picking, benches, signage, conservation areas, volunteer guides"

"Discounts should be offered to locals"

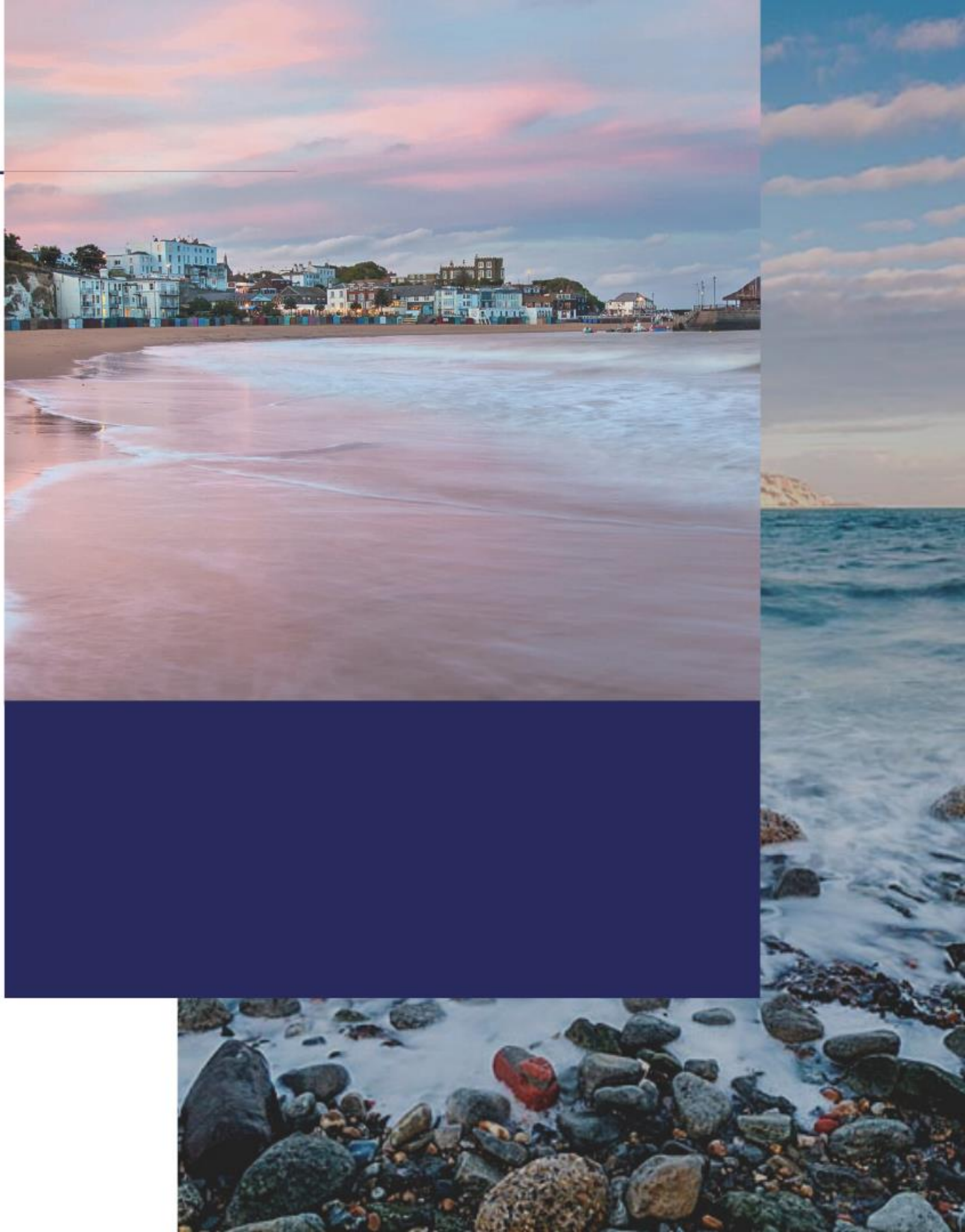
"Seasonal nature of tourism means attractions close over winter and this creates a void atmosphere"

"Coastal area over crowed and too expensive for locals"

"M20 awful for locals because of tourists and freight travelling cross channel"

"Great shame the tourist office closed a few years back, due to Government imposed cuts to Local Authorities funding"

Key Takeaways & Recommendations



Key Findings & Recommendations

Finances & Cost of Living

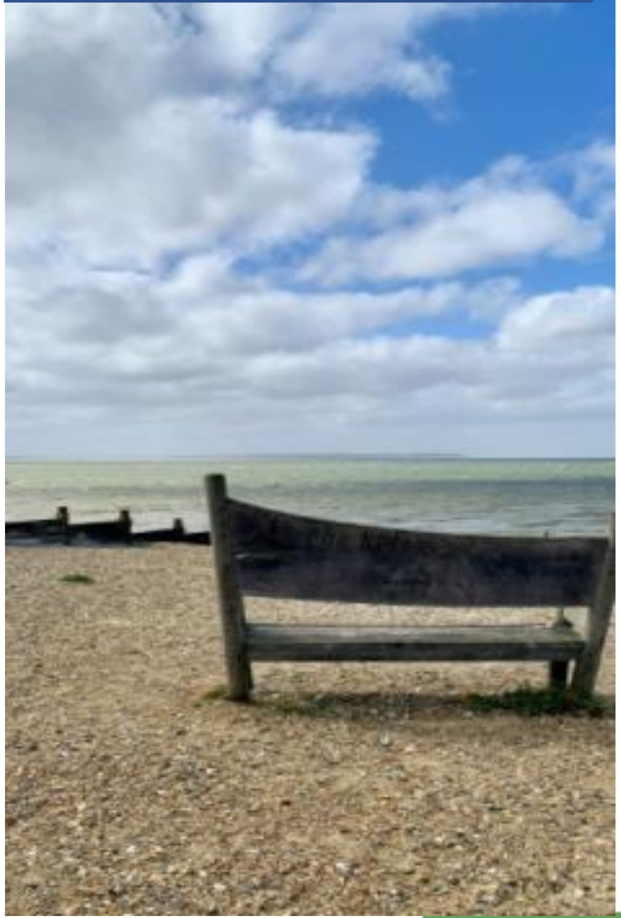
- Findings demonstrate an ongoing trend of concern around financial security, with a steady increase in agreement that tourism increases prices locally. This trend is likely reflective of the cost of living crisis, with results also showing that financial stability was lower among those aged 35-64, as this group likely to consist of those with older or younger children, which may incur additional costs.
- This sentiment demonstrates the need to continue to incorporate messaging around the cost of living in marketing communications and campaigns, including promoting free things to do within the destination and cost effective ticketing options for families.

Employment

- Across each wave findings have demonstrated an improvement around perceptions that tourism helps to support local employment, with results for this wave further demonstrating signs of recovery for the sector following the pandemic in terms of residents' perceptions around employment opportunities.
- Overall, residents do agree that working in the tourism and hospitality industry is an attractive career, with this perception seeing an improvement among the younger age bracket, but still slightly lower in rural areas.
- Results highlight an opportunity to further improve perceptions of employment opportunities in the tourism industry in more rural areas, and continue to promote careers to the younger demographic.

Increase in Visitor Footfall

- Residents are more likely to observe an increase in visitor footfall in the peak summer season vs. winter, which is further supported by residents also agreeing that there are too many visitors at this time, particularly in more built-up urban areas.
- However, residents are also more likely to agree that resident engagement with attractions and facilities is higher in the summer, but that perhaps they are harder to access likely due to overcrowding.
- These insights further justify and show the importance of visitor dispersal work and activity to extend the tourism season into the shoulder months.



Key Findings & Recommendations

Transport

- Wave 5 shows an improvement in perceptions around public transport services, which may indicate that residents are acknowledging initiatives to develop local transport connections and projects. However, wave 5 results do show that 10% of respondents stated that they didn't travel for leisure in summer 2022 due to travel disruptions.

Infrastructure

- Results are continuing to show improvement around the perceptions of tourism's impact on improving local infrastructure, particularly among KDAONB residents. This re-emphasises the success of various projects and local initiatives to improve infrastructure such as foot and cycle paths and rights of way.

The Environment & Sustainability

- Results still highlight that residents do strongly acknowledge that tourism can be harmful to the natural environment, with agreement seeing a +5% increase compared to wave 4. However, when looking at this trend overtime, although there was a sharp increase in wave 2, since then agreement has been higher in the summer months.
- Findings again highlighted that residents living in the KDAONB are more aware of both the negative and positive impacts that tourism can bring to the environment.
- Overall, it will be vital that we continue to strive to become a more sustainable destination, and work to counteract any negative impacts that tourism causes to the environment, through both inspirational and educational consumer messaging. This should also include ensuring that visitors respect and protect the environment in more busier periods, where certain areas may experience overcrowding and are therefore more susceptible to pollution, litter and traffic in the summer months.

Key Findings & Recommendations

Working Patterns & Engagement with Green Spaces

- Results still illustrate the adoption of hybrid working following the pandemic, however results do show that there has been an increase in residents that have returned to working in the office full-time.
- Engagement with local cafes, shops and green spaces when working from home is strong, with both seeing an increase compared to the previous wave. Again this was particularly high in the case of residents engaging with green spaces and outdoor areas for walking and cycling, with this lending itself well to the fact that these are free to access and are good for well-being. This increase in engagement may also be due to these activities being more appealing and accessible in the warmer summer months.
- Again, similar to the previous wave, engagement with green spaces was higher among residents living in the KDAINB and rural areas. Overall, results demonstrate an opportunity to continue to promote green spaces and outdoor areas, particularly in more urban locations, where green spaces may not be as readily available.

Kent as a Leisure Destination

- Findings demonstrate that residents do perceive the county as a leisure day trip or staycation destination, with this being higher among KDAONB residents and for those aged 65 years+. This again highlights the opportunity to further position Kent as a leisure destination for residents looking for something to do on their doorstep.

- This is further supported by just under half of residents having had friends and relatives to stay in the last six months for leisure, with this seeing a +12% increase compared to the previous wave. This could indicate that people are looking to take more closer to home trips and/or stay with friends and relatives as a more cost effective accommodation option. These insights continue to show the strength of the VRF market, and may also show that this increase may be due to increased visitation in the summer months. Moving forward, this percentage can continue to be monitored in the final Winter wave of the survey and moving forward to further monitor this trend.

Key Findings & Recommendations

Summer Activity & Travel Intentions

- Results show a shift away from residents staying at home due to the pandemic, with more residents taking trips for leisure, showing an appetite for trips closer to home.
- This may be further driven by the cost of living crisis, with people looking to spend less but still have memorable travel experiences. This was supported by the majority of residents having taken a day trip in Kent in summer 2022 and just under 20% having taken an overnight trip.
- Looking at future travel intentions, there is an ongoing opportunity to promote staycations and day trips within Kent, as people will still look to prioritise travel.
- In terms of attractions and experiences residents engaged with in summer, results illustrate the strong interest and importance of retail, events and heritage among the hyper-local market, and show the appetite for active travel and use of green spaces. And in terms of more experiential activities, findings show a particular interest in food & drink and outdoor-based experiences.
- These insights will be key in helping to further develop hyper-local market insights and position local experiences and attractions among the local audience and tailor content for each audience.

APPENDICES

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%
WAVE 5	33%	41%	16%	6%	3%	1%	0%	90%	4%
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%
WAVE 5	37%	43%	15%	3%	2%	1%	0%	95%	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%
WAVE 5	23%	34%	23%	11%	6%	3%	0%	80%	9%
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%
WAVE 5	9%	17%	33%	20%	13%	7%	2%	59%	22%
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%
WAVE 5	18%	26%	29%	16%	6%	4%	1%	73%	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%
WAVE 5	6%	12%	9%	27%	16%	24%	6%	27%	46%
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%
WAVE 5	14%	33%	18%	27%	5%	3%	1%	65%	9%
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%
WAVE 5	10%	18%	21%	27%	19%	4%	1%	49%	24%

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%
WAVE 5	33%	41%	16%	6%	3%	1%	0%	90%	4%
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%
WAVE 5	36%	42%	16%	4%	2%	1%	0%	94%	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%
WAVE 5	25%	36%	20%	12%	6%	2%	0%	81%	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%
WAVE 5	11%	15%	10%	23%	21%	13%	9%	36%	43%
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%
WAVE 5	12%	22%	23%	30%	8%	4%	1%	57%	13%
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%
WAVE 5	7%	14%	15%	28%	20%	14%	3%	36%	37%
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%
WAVE 5	15%	22%	17%	18%	17%	8%	4%	54%	29%

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%	0%	91%	4%
WAVE 3	25%	46%	16%	7%	4%	2%	1%	87%	7%
WAVE 4	23%	46%	18%	9%	2%	1%	1%	87%	4%
WAVE 5	25%	47%	17%	7%	3%	1%	0%	89%	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%	0%	92%	5%
WAVE 3	23%	47%	17%	6%	4%	2%	1%	87%	7%
WAVE 4	22%	47%	20%	6%	3%	1%	0%	89%	4%
WAVE 5	23%	50%	16%	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%
WAVE 5	16%	32%	22%	20%	7%	2%	2%	70%	11%
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%
WAVE 5	15%	35%	24%	14%	8%	2%	1%	74%	11%

Having visitors around helps me feel more strongly connected to my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
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%
WAVE 5	9%	25%	18%	34%	8%	5%	2%	52%	15%
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%
WAVE 5	27%	49%	10%	11%	3%	3%	1%	86%	7%
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%
WAVE 5	17%	41%	20%	10%	8%	2%	1%	78%	11%
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%
WAVE 5	13%	36%	21%	16%	9%	3%	2%	70%	14%
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%
WAVE 5	4%	5%	6%	11%	11%	30%	33%	15%	74%
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%
WAVE 5	11%	27%	29%	13%	12%	6%	2%	67%	20%
I live in a beautiful area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
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%
WAVE 5	26%	34%	20%	10%	6%	3%	1%	80%	10%
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		
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%
WAVE 5	21%	34%	23%	13%	5%	3%	1%	78%	

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%
WAVE 5	22%	32%	39%	6%	1%	54%	7%
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%
WAVE 5	14%	31%	48%	6%	1%	45%	7%
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%
WAVE 5	9%	38%	42%	10%	2%	47%	12%
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%
WAVE 5	8%	22%	46%	20%	6%	30%	26%
The availability of recreation facilities and opportunities has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot		
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%
WAVE 5	8%	30%	44%	14%	4%	38%	18%
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%
WAVE 5	9%	43%	27%	15%	6%	52%	21%

Looking to future travel, which of the following statements describes your travel plans? Please select all that apply.	Wave 4	Wave 5
I will take more day trips in England in 2022/2023	47%	44%
I will take more short breaks/holidays in England in 2022/2023	61%	47%
I will take more day trips in Kent in 2022/2023	54%	49%
I will take more short breaks/holidays in Kent in 2022/2023	16%	19%
I will go back to travelling abroad as much as I did before COVID in 2022/2023	29%	26%
None of the above	5%	8%

Sources of Information	Wave 4	Wave 5
Visit a Kent destination website (e.g., www. visitkent.co.uk, www.explorekent.org, www. whatsoninkent.com, www.kentdowns.org.uk)	57%	52%
Visit review websites (e.g. TripAdvisor, Booking.com, Expedia)	47%	45%
Visit the specific attractions websites (e.g. National Trust, Chatham Historic Dockyard etc.)	67%	60%
Visit a landscape or wildlife information site (e.g., www.kentdowns.org.uk; www.kentwildlifetrust.org.uk, Woodland Trust or RSPB)	35%	27%
Use a travel guide or tour operator app (e.g. Explore Kent)	11%	11%
Use a specific attraction app (e.g. Leeds Castle, Canterbury City Guide)	26%	25%
Look through destination brochures and leaflets	18%	20%
Read an article in a magazine or newspaper	23%	22%
Look for recommendations on social media	25%	22%
Opinions of bloggers and influencers	2%	5%
Ask friends and family for recommendations/friend and family made recommendations	40%	33%
Visit the Tourist Office	12%	12%
Other	4%	3%

Changes to travel behaviour	Wave 4	Wave 5
I have not changed my holiday plans or choices as a result of COVID	18%	30%
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%	45%
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%	25%

This research report has been produced by:

VISIT KENT BUSINESS GARDEN of ENGLAND

Kent Downs Area of Outstanding Natural Beauty

Conducted as part of the Interreg Channel Experience Project and co-financed by the European Regional Development Fund

Interreg France (Channel Manche) England EXPERIENCE

EUROPEAN UNION European Regional Development Fund