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Interreg EXPERIENCE- Social Impact Monitoring: Kent Residents Survey

WAVE 6 - WINTER 2022/23





VISIT KENT
BUSINESS
GARDEN of ENGLAND

Kent Downs
Area of Outstanding Natural Beauty

Contents

Introduction and Report Overview

This report looks to present findings from the sixth and final wave of data collection as part of the Kent Residents research, which looks to gather valuable insights into the perceptions of seasonal tourism. Findings for this wave are based on Winter tourism in 2022/23, with the previous wave based on Summer 2022. Reports for all previous waves 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. The support of local communities is fundamental to successful tourism development and continuity, and can have a considerable impact socially, economically, environmentally, and on 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 seasons, parallels and contrasts can be drawn, allowing findings to be aligned to help support and inform wider project activity. The survey looks to cover areas including, perceptions of key impacts of tourism, impact on wellbeing, observed changes in footfall and engagement with local attractions and facilities, alongside overall support for tourism in the county.

As the surveys have progressed throughout the project, additional questions have been added to further enrich the usefulness of insights. This included a series of questions around residents' leisure travel and preferences, to further develop the hyper-local audience insights and to help inform local marketing activity and campaigns. This also included questions around changes to working patterns due to the pandemic, alongside engagement with local cafes, amenities and green spaces for walking and cycling when working from home. Alongside identifying changes from previous waves, as this is the last in the series of seasonal surveys, this report will also look to summarise key trends and findings across all data collection waves.

Sustainable growth of seasonal tourism, without compromising eco-systems & quality of life for local residents

Given the unprecedented impact of COVID-19, a number of previous waves aimed to monitor the implications of the pandemic. 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 into the present context.

Consequently, when comparing findings with previous waves, it is be imperative that these are understood and interpreted in line with when data was collected. The timeline presented below highlights survey periods an those that were impacted by COVID-19 restrictions.

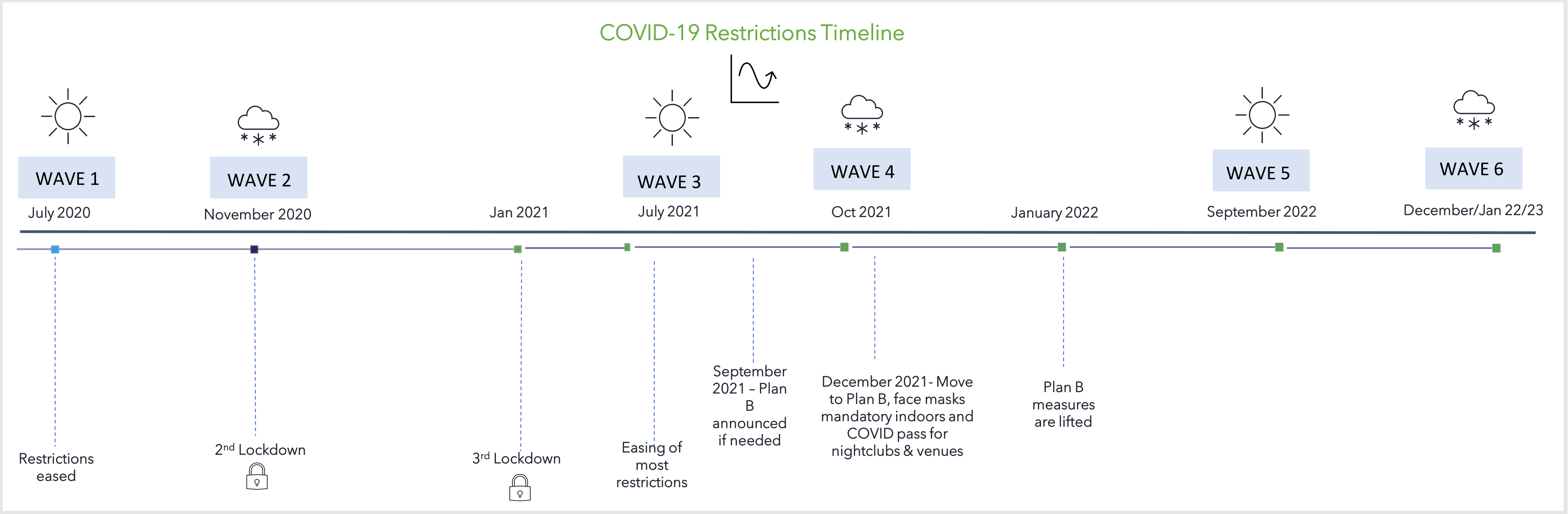


Diagram showing a timeline of survey waves that were impacted by COVID-19 restrictions

Kent Residents Research - Wave 6

KEY FINDINGS

This report is based on findings from the sixth wave of the Residents Research, 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

87% Agreed with the statement 'I support winter tourism in my local area'

Perceived Main Attraction

Coast/Beaches	Museums/Historic sites	Countryside
30%	30%	24%

686 Kent Residents

Online Survey

Too many visitors

10% Agreed that there are too many visitors in their local area, down vs. the previous summer

-17% vs. Wave 5

Damage to the Environment

48% Agreed that tourism can cause damage to the natural environment

-11% vs. Wave 5

82% Of residents agreed with the statement 'I live in a beautiful area'

Transport

-20% decrease in agreement that local transport services are improving vs. wave 5

In winter 2022
55% took a day trip in Kent
15% took an overnight trip in Kent

53% will take more day trips & 14% more overnight stays Kent in 2022/23

49% had friends and relatives to stay in the last 6 months

When working from home...

49% use more local cafes and shops

73% access more outdoor green spaces

46% Of residents agreed having visitors around helps them feel more strongly connected to their local area

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.

06

Wave 6 - Winter 2022/23

Wave 6 of the survey was sent out to Kent residents in January 2023, to gain an insight into perceptions of winter 2022/23 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 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 also kept strictly anonymous and confidential.

The survey was scripted and hosted by the University of Surrey, who are partners in the project, with data then being 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 686 respondents.

Please note, that due to the total sample size for wave 6 being lower compared to previous waves, results will not be analysed by demographics. However, key trends identified in previous waves by age and other segments will be summarised in the key findings and recommendations section at the end of this report.

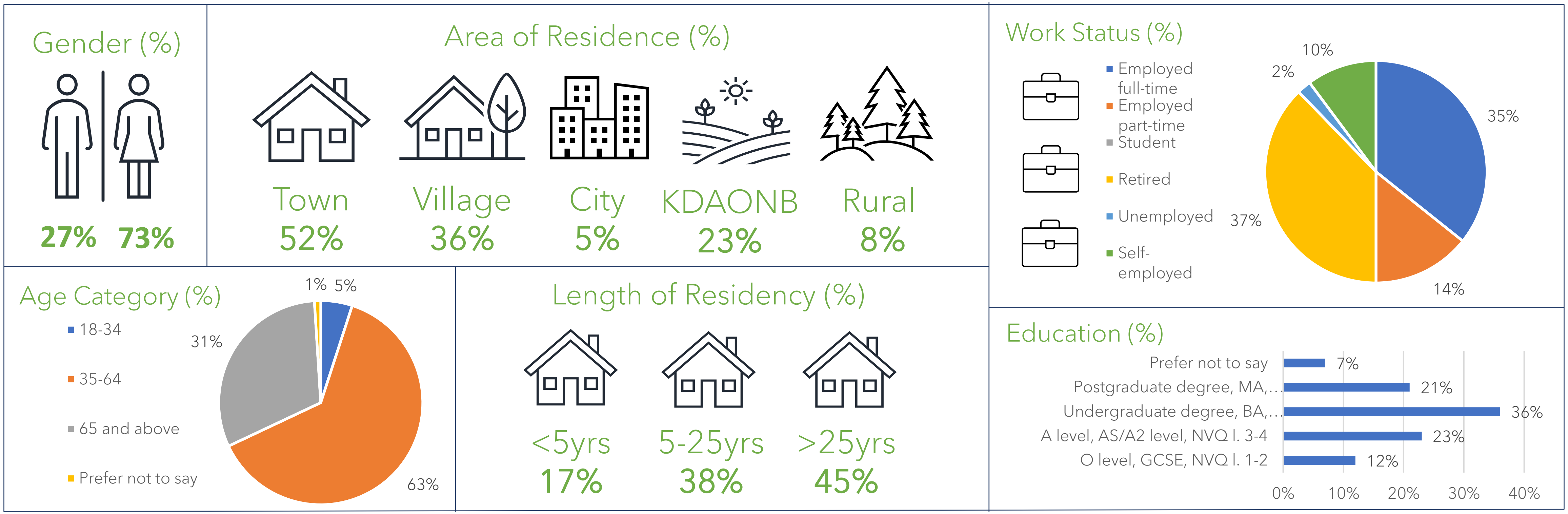
Online survey sent to Kent Residents

12 minutes to complete

686 Respondents

Sample & Demographics

- Findings show that similarly to previous waves, the majority of respondents were female, and those aged 35-64 years.
- Respondents most commonly stated they live in a town (**52%**), with **45%** having lived in their area for over 25 years. The largest proportion were retired (**37%**), closely followed by **35%** employed full-time.
- Overall, demographics mirror the previous wave, however there was a decrease in the proportion of male respondents vs. wave 5 (**-15%**), alongside a **-12%** decrease in those aged 18-34 years.



District

- The survey asked respondents to specify which district they live in. As shown in the graph, in wave 6 the largest proportion of respondents were located in Ashford (**16%**), followed by those living in Maidstone (**12%**) and Folkestone & Hythe and Canterbury (both **10%**).

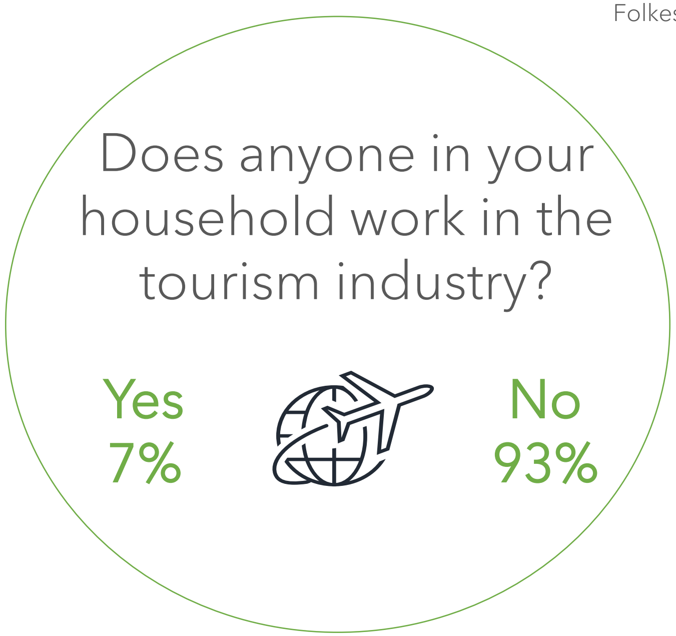
- The proportion of respondents located in each district does indicate that the sample is fairly illustrative of each of Kent's regions, with representation in East, West and North Kent. Please note that when comparing results with previous waves, the sample sizes of respondents in each district will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

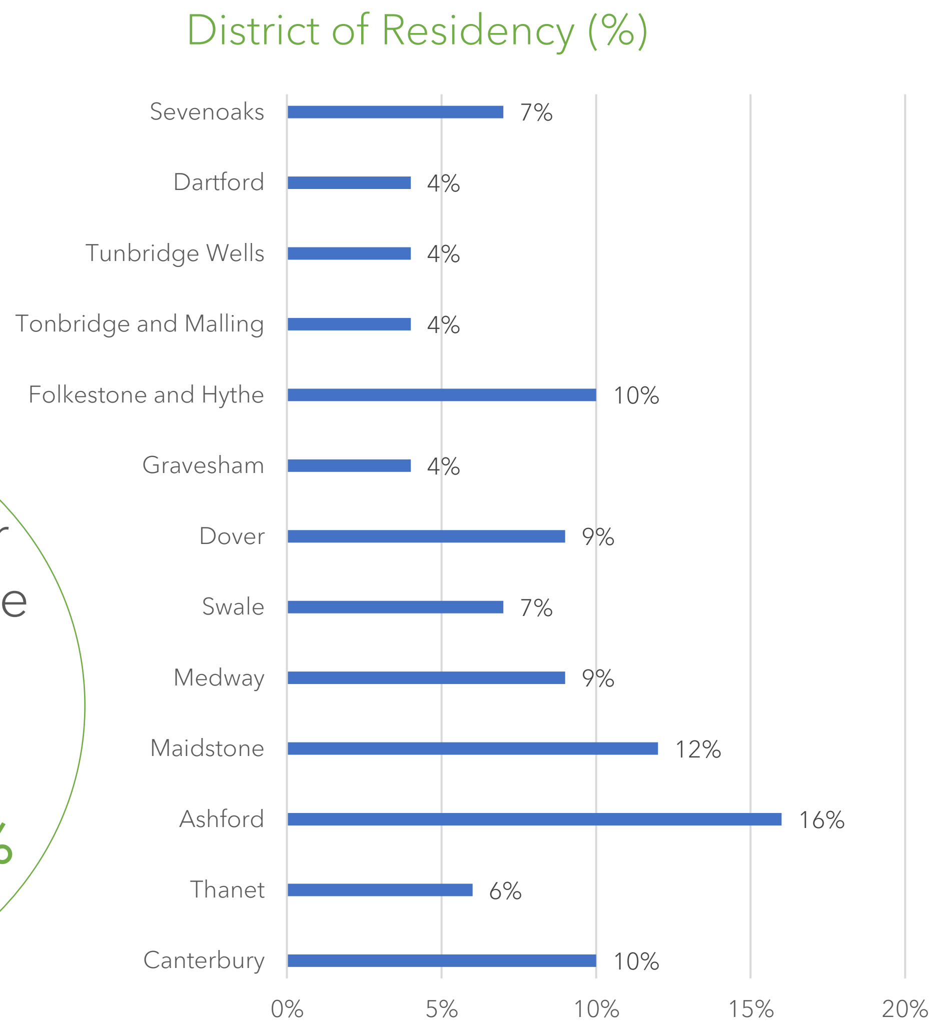
Tourism Industry Involvement

- In wave 6, **7%** of respondents stated that someone in their household worked in the tourism industry at the time of data collection.

- Looking at responses across each wave, on average **10%** of respondents had a household member working in the sector.

- Excluding waves 1-3, when the industry was heavily impacted by COVID-19, results may show that this percentage is higher in the summer months, which may be due to the traditional increase in demand for seasonal staff, during the busier summer months.





KENT RESIDENTS SURVEY FINDINGS

IMPACT AND BENEFITS OF TOURISM

01

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.

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 for each wave will be included in the appendices, which can be found at the end of this report.

- Overall, respondents were more likely to agree that tourism **reduces their ability to access local services** in summer, as opposed to winter. This demonstrates that due to potential overcrowding in the peak season, some residents may feel this inhibits their ability to access local amenities as easily. This sentiment also supports the need to disperse visitors to other areas in the county during busier periods, but also shows justification for potential resident initiatives, such as priority entry, discounted tickets and local campaigns such as the Kent Big Weekend.
- In support of this, respondents were more likely to agree there are **too many visitors in their local area** in summer as opposed to winter. However, as illustrated in the diagram, this does not represent the majority of residents and, therefore, for many, they do not negatively perceive visitors' presence.
- In terms of **prices for local services and amenities**, agreement that tourism increases these was higher in summer overall, with a sharper increase in agreement seen in wave 5. Overall, around 50% or more of residents agreed with this, which may be a result of concerns related to the cost of living crisis. Therefore, it will be important to continue to incorporate free things to do and cost-effective trip options in marketing content to the hyper-local audience and to explore and share discounted entry options to attractions.

Agreement	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6
Tourism reduces my ability to access local services and facilities	23%	25% ⇧	30% ⇧	25% ⇩	36% ⇧	17% ⇩
Tourism increases prices for local services and amenities	45%	47% ⇧	52% ⇧	47% ⇩	57% ⇧	43% ⇩
There are too many visitors in my local area	16%	22% ⇧	18% ⇩	15% ⇩	27% ⇧	10% ⇩

- Since wave 1, there has been a steady increase in agreement that **local transport services are improving**, however in wave 6 this saw a sharper decline. Although this sentiment may show acknowledgement of initiatives to improve transport locally, this still only represents a small proportion of residents and may reflect ongoing strike actions and increases in prices. These results demonstrate the need to carry on improving perceptions around transport locally, by continuing to work closely with transport providers and provide and promote cost-effective ticketing.

- Perceptions **around local infrastructure** has seen significant improvement, particularly following wave 3. These results demonstrate that residents strongly acknowledge that tourism can be a mechanism for improving facilities. This demonstrates the need to continue to maintain this and to ensure that funding continues to be reinvested into improving facilities.

- Despite small fluctuations wave on wave, perceptions around tourism's ability to **increase employment and improve the economy** has been consistently positive throughout each wave, and is seen as a key benefit of tourism activity. However, agreement in relation to job creation did see a dip in wave 2, but this is likely a result of the pandemic, with many businesses being forced to close and place people on furlough, but since then this has seen improvement, highlighting signs of recovery.

Agreement	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6
Local transport services are improving	8%	9%	13%	23%	36%	16%
Local infrastructure is improving (e.g. public toilets, car parks, playgrounds, footpaths, cycle paths)	17%	19%	20%	46%	54%	47%
Tourism increases employment opportunities	92%	79%	88%	85%	90%	88%

Impact on the Natural Environment

- In terms of tourism's impact on the natural environment, following a sharp increase in wave 2, agreement that tourism is harmful to natural places has seen fluctuations, with a decrease in wave 3 and 4, followed by a slight increase in Summer 2022. However, looking at wave 6, this saw a decrease of **-11%,** with **48%** agreement. When looking at the previous 5 waves, results may indicate that agreement is higher in Summer, which may be due to increased visitation. However, results overall do demonstrate that residents do feel that tourism can be harmful to the environment, and therefore indicates the need to address this and focus on sustainable and nature-positive initiatives.

- When looking at tourism's ability to protect and enhance the natural environment, results from across all six waves have been fairly consistent, with around **50%** of residents agreeing to some extent that tourism can help to enhance natural areas. Moving forward, it will be vital that tourism organisations continue to work to invest and engage in environmental projects and initiatives.

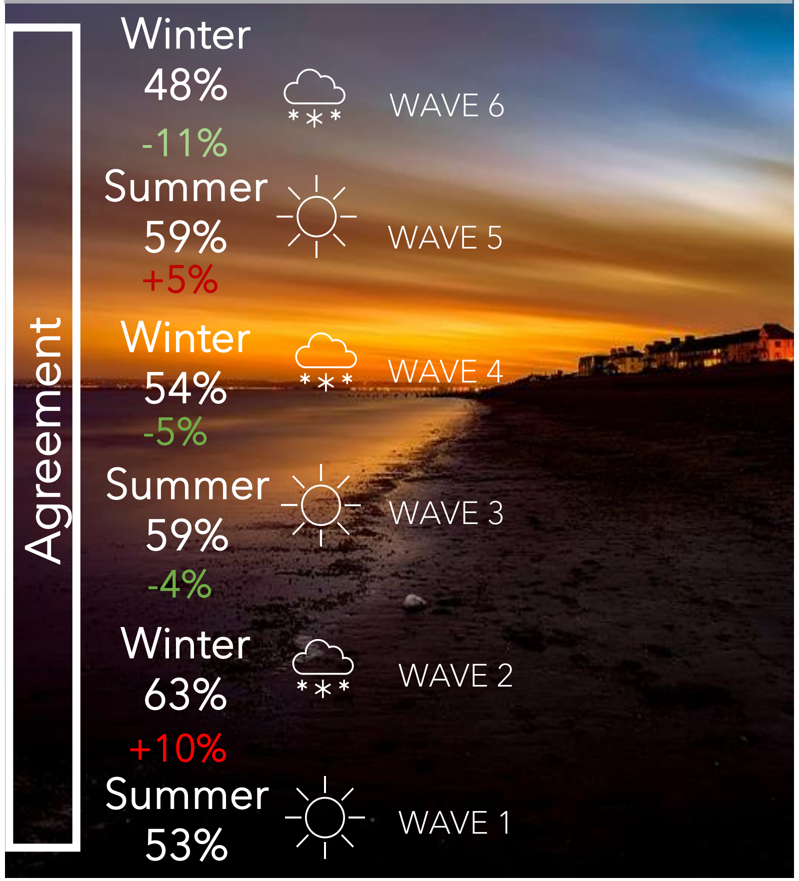
Tourism protects and enhances the natural environment - Agreement (%)

WAVE 1	WAVE 2	WAVE 3	WAVE 4	WAVE 5	WAVE 6
55%	51%	45%	49%	49%	50%

When asked for further information across each of the waves, 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 also 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'



Preservation & Demand for Heritage

Throughout the surveys, respondents have consistently displayed a strong level of agreement that tourism preserves both historic buildings and monuments but also increases the demand for these and cultural attractions, with an average of around 90-95% agreement. In turn this demonstrates that residents strongly acknowledge that tourism is a key driver in maintaining these important assets.

Availability of Local recreational facilities/opportunities

Looking at sentiment across each wave, findings show that on average around 80% of respondents agreed that tourism increases the availability of local recreational facilities and opportunities. Agreement also saw improvement following wave 3 after the lifting of COVID-19 restrictions, with this being likely reflective of businesses being able to open and residents being able to more easily access and visit local facilities and attractions. But overall, this sentiment also highlights that residents do acknowledge that tourism helps to create recreational facilities locally, which they can benefit from, creating a sense of place.

Visitor Interaction

In terms of visitor interaction, between 60-70% of respondents agreed across each wave that they like to meet visitors of their local area, with consistent results irrespective of season. As a result, this sentiment will help to create a friendly and welcoming environment for visitors, which is vital in terms of tourism development and creation of a sense of place.

Parking Availability

Concerns around parking availability became progressively worse between waves 1-3, however this did even out, with a slight decrease observed in wave 6. However, this has continued to be a major concern for residents, with an average level of agreement of 72%. Furthermore, this indicates that this is a key issue for local communities and therefore needs to be addressed.

Local Investment, Development & Infrastructure

Agreement that tourism improves local investment, development and infrastructure spending in the economy saw a sharp increase in wave 2. This increase could be due to the impact of the pandemic on the tourism industry being evident, with the loss of the sector's contribution being felt greatly. Since the pandemic, this has seen a steady level of agreement of around 80% and is therefore seen as a key benefit of tourism activity. Moving forward, it will be important to continue to seek out funding opportunities and to share information about ongoing or planned development and investment opportunities in local communities, to maintain this positive perception.

KENT RESIDENTS SURVEY FINDINGS

IMPACT ON WELLBEING & EMOTIONAL CONNECTION

02

Impact of Winter Tourism on Emotional Connection

Winter — Summer

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

- Across each wave, respondents have demonstrated a strong level of agreement that they are satisfied with their life, alongside agreeing that they live in a beautiful area, with the latter being slightly higher in the winter waves.

- This slight increase in agreement that they live in a beautiful area in winter could be due to this period of the year being traditionally less busy and therefore residents may be able to explore and visit places more freely.

- Findings show that regardless of the season, the majority of residents agreed that tourism would not be a reason for them to move away from their local area, which shows that this is not a negative influence, highlighting support for tourism activity.

- Overall, respondents agreed their local area is peaceful and calm, seeing a peak in waves 1 and 2, with this potentially being a result of the pandemic, with less visitors in certain areas and many places being closed.

- Agreement that residents feel safe in their local area also saw a good performance across each wave, with results showing that this was marginally lower in the summer vs. winter, which could be due to more noise, visitation and traffic at this time of year.

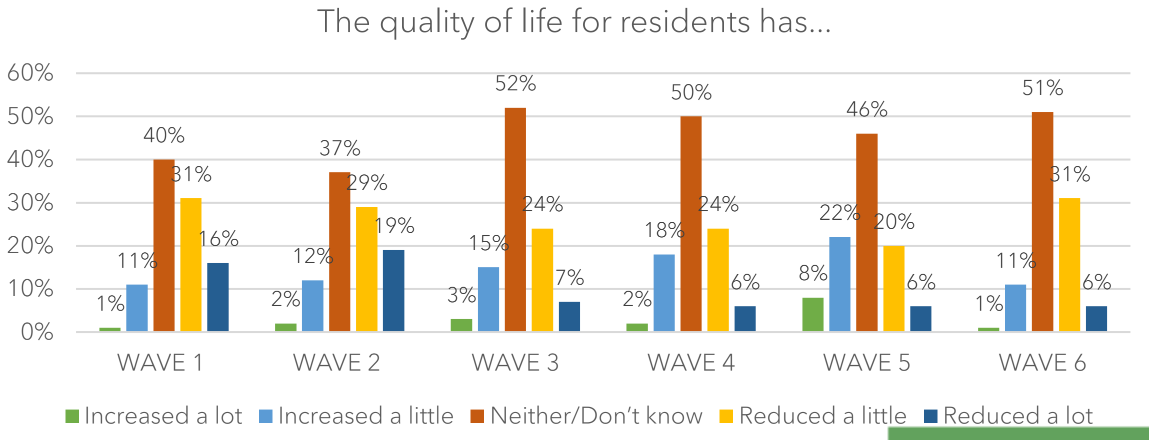
- When asked if having visitors around helps residents feel more strongly connected to their local area, on average around 50% agreed with this, slightly higher in summer. As a result, this shows that for a significant proportion of residents, visitor presence may help to create a stronger connection with their local area, contributing to a more vibrant area and increased sense of place.

For a significant proportion of residents, visitor presence may help to create a stronger connection with their local area, contributing to a more vibrant area and increased sense of place.

- Looking at optimism for the future, in wave 6 **71%** agreed with this, on par with wave 5. Over all six waves this was highest in wave 2, although this may have been due to respondents feeling hopeful of the pandemic coming to an end, but following this, results still show that residents are optimistic and excited for the future.
- While only marginal, findings show that agreement that residents feel calm and relaxed, was slightly higher in winter, which may mirror findings around local areas being quieter in the off-season.
- In terms of financial security, following waves 1 and 2, this saw a decline, potentially due to the cost of living crisis, however overall a good proportion do feel financially secure.

	WAVE 1	WAVE 2	WAVE 3	WAVE 4	WAVE 5	WAVE 6
Overall, I feel very excited about my future	70%	75%	65%	63%	70%	71%
Overall, I feel calm and relaxed	72%	77%	71%	72%	74%	76%
I feel financially secure living here	82%	80%	74%	73%	70%	74%
I feel strongly connected to my local area (1-3 MORE CONNECTED)	65%	65%	57%	79%	78%	78%

- Findings show that agreement that residents feel strongly connected to their local area has been consistent since wave 4, with **78%** of respondents agreeing with this in wave 6.
- In terms of quality of life, prior to wave 5 this was presented in relation to COVID-19, with this then being removed. Overall, results show that residents may be more likely to feel that their quality of life increased in the summer. However, across each wave the largest proportion have consistently specified 'neither/don't know', with a larger proportion feeling this had decreased as opposed to this improving. Moving forward, it will be important to continue to monitor residents' views towards quality of life in further research. In addition, it will be important to continue to focus on initiatives that looked to improve residents' wellbeing.



KENT RESIDENTS SURVEY FINDINGS

VISITOR FOOTFALL AND LOCAL ENGAGEMENT

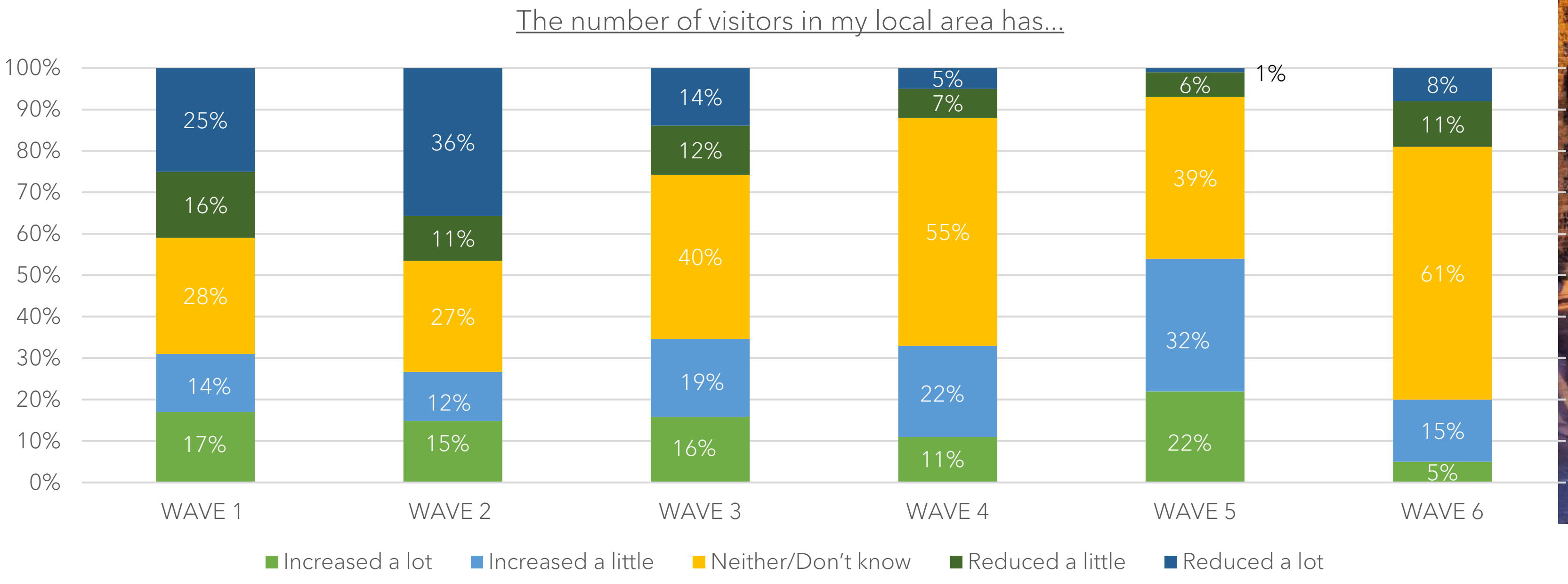
03

Change in Visitor Numbers

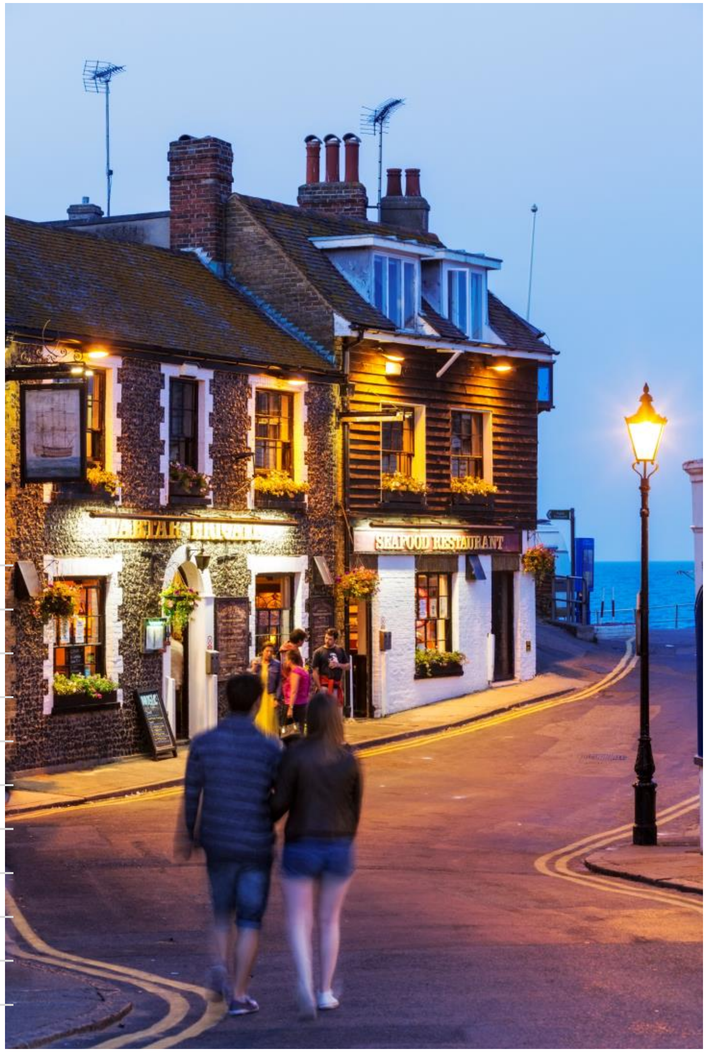
Throughout each wave, respondents were asked whether they had observed any changes in visitor footfall in their local area compared to the previous wave.

- Generally, when looking at sentiment across all six waves, findings show that respondents were more likely to have observed an increase in visitor footfall in the Summer waves, compared to Winter. To illustrate this, in wave 6, **20%** observed an increase in footfall vs. **54%** in Summer (wave 5).

- Overall, results highlight the popularity of the Summer season and the need to focus on visitor dispersal in certain tourism hotspots in the county, while continuing to promote and build Kent's tourism offering in the off-season to facilitate this dispersal further.

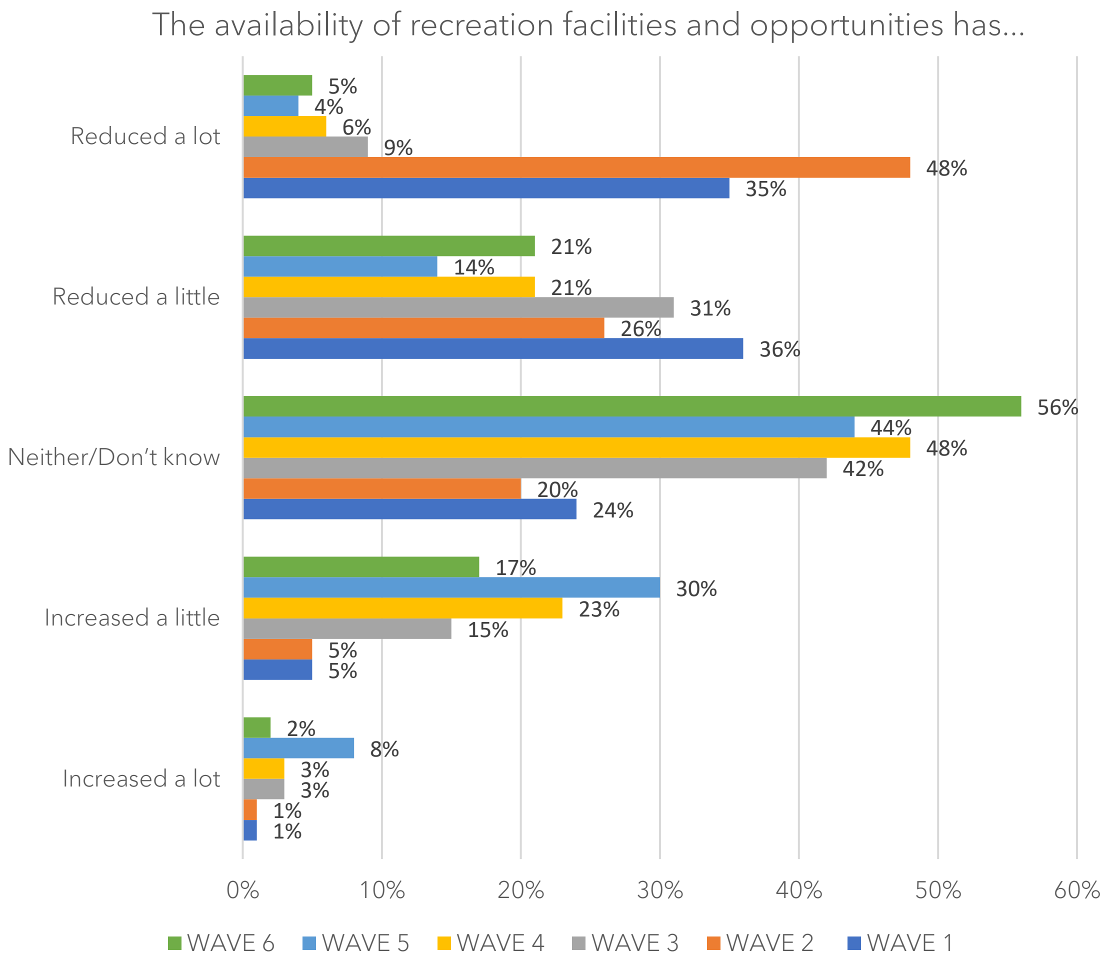


Graph showing changes to visitor footfall BASE= 686



Participation and Availibility

- Looking at the availability of local amenities such as cultural attractions and recreational facilities, results firstly show that these were heavily impacted in waves 1-3, with only a small proportion feeling these had increased, likely due to the impact of the pandemic, with many businesses being forced to close.
- However following this, results across all six waves have shown that respondents are more likely to agree that the availability of these local facilities and attractions are higher in Summer compared to Winter.
- For example, in wave 6, **23%** of respondents agreed that the number of cultural attractions available to visit such as exhibitions and events has increased, compared to **47%** in the previous Summer wave. Similarly, **19%** of respondents in wave 6 agreed that the availability of recreational facilities and opportunities has increased compared to **38%** in wave 5.
- In terms of resident engagement with local attractions and facilities, results are fairly similar. Participation of course was heavily affected in waves 1-3, due to the pandemic, however in subsequent waves respondents were more likely to have participated more so, or to observe more residents using local attractions and facilities in Summer, compared to Winter.



Graph showing the availability of recreation facilities BASE= 686

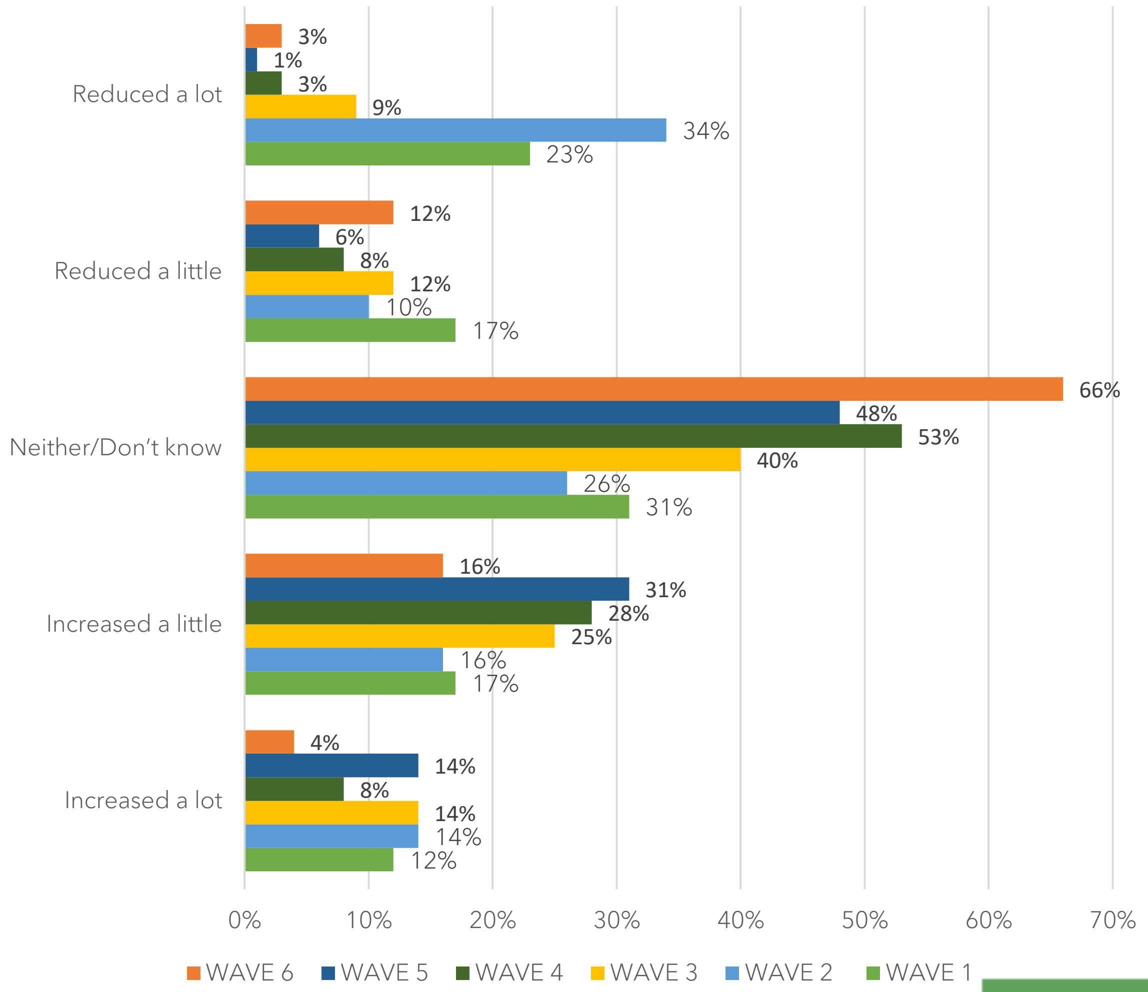
Participation and Availibility

- The availability and provision of things to do in residents' local areas are higher in Summer, and therefore may support the notion that the tourism offering in the off-season could be developed further. This also supports work and activities to extend the season, to ensure that residents are able to access and visit local attractions and facilities all year round.

- While results show that participation and engagement is greater in Summer, likely also due to the provision being higher, other questions highlight that some residents feel that they aren't as easily able to access or enjoy local facilities and attractions as freely in the Summer, which could potentially be due to overcrowding. Moving forward, it will be important to continue to measure resident perceptions around both the availability and participation.

Findings show that the availability and provision of things to do in residents' local areas is higher in Summer, and therefore may support the notion that the tourism offering in the off-season could be developed further

The number of residents using local attractions and facilities has...



Graph showing the number of residents using local attractions and facilities
BASE= 686

KENT RESIDENTS SURVEY FINDINGS

WORKING PATTERNS AND ENGAGEMENT WITH LOCAL FACILITIES

Working Patterns and Engagement with Local Facilities

Since wave 4, the survey asked respondents to specify what best describes their working patterns considering the COVID-19 pandemic.

- As illustrated in the table, the largest proportion of respondents across each wave specified they have always travelled to work, and continued to do so during the pandemic.
- This was followed by respondents 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.
- Overall, results show that a proportion of residents may be key-workers or working in industries that continued to operate more normally throughout the pandemic.
- Findings also demonstrate the growing adoption of hybrid working measures among organisations, and that in turn local residents are spending more time in their local area compared to pre-pandemic.

Looking at the following statements, which one best describes your working patterns considering the COVID-19 pandemic?	WAVE 4	WAVE 5	WAVE 6
I have always travelled to work, and I have continued to do so over the pandemic	36%	36%	37%
I have always worked from home	12%	10%	10%
Since the pandemic, my organisation introduced working from home measures, but I have now returned to the workplace full-time	7%	17%	8%
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%	31%
Prior to the pandemic, I had already began working in a more hybrid way (for example working from home on certain days)	8%	11%	8%
Other	6%	3%	6%

Engagement with Local Facilities

The survey then asked respondents who stated they work from home in some capacity about their engagement with local amenities such as shops and cafes, alongside outdoor green spaces for walking and cycling.

- Looking at engagement with local cafes and shops, **49%** of residents agreed with this statement in wave 6, a decrease of **-4%** vs. wave 5. Overall, engagement is fairly strong, with this potentially being higher in the Summer compared to Winter, but could also be due to cost of living concerns.

- Similar to the previous two waves, engagement with outdoor green spaces for walks and cycling was higher, with **73%** of respondents agreeing they use these more frequently when working from home in wave 6, on par with sentiment expressed in wave 5.

- Overall, insights demonstrate that due to the growing adoption of hybrid and home-based working following the pandemic, residents are more easily able and more likely to access green outdoor spaces. Consequently, this can bring various wellbeing benefits to local communities and therefore it will be important to continue this trend and ensure local green spaces are promoted.

- In previous waves, it was also identified that those living in more urban or city areas may not engage with green spaces as frequently. Moreover, this also shows that it will be important to also focus on promoting and developing urban green spaces.

- In addition, for some respondents they may look to minimise visits to shops and cafés to save on spending due to the cost of living crisis, and green spaces may be more appealing due to being free to explore.

WAVE 4
WAVE 5
WAVE 6

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

	Wave 4	Wave 5	Wave 6
Agree	43%	53%	49%
Disagree	43%	34%	41%

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

	Wave 4	Wave 5	Wave 6
Agree	69%	75%	73%
Disagree	31%	18%	18%

KENT RESIDENTS SURVEY FINDINGS

RESIDENT TRAVEL BEHAVIOUR AND PERCEPTIONS

05

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, to help to further develop hyper-local audience profile.

Tourist Destination

- In wave 6, **72%** agreed they consider their local area to be a tourist destination, on par with waves 4 & 5. Looking at sentiment across each wave, results strongly demonstrate that residents perceive their area as a tourist destination and in turn, may consider areas in the county for a leisure day trip or staycation.

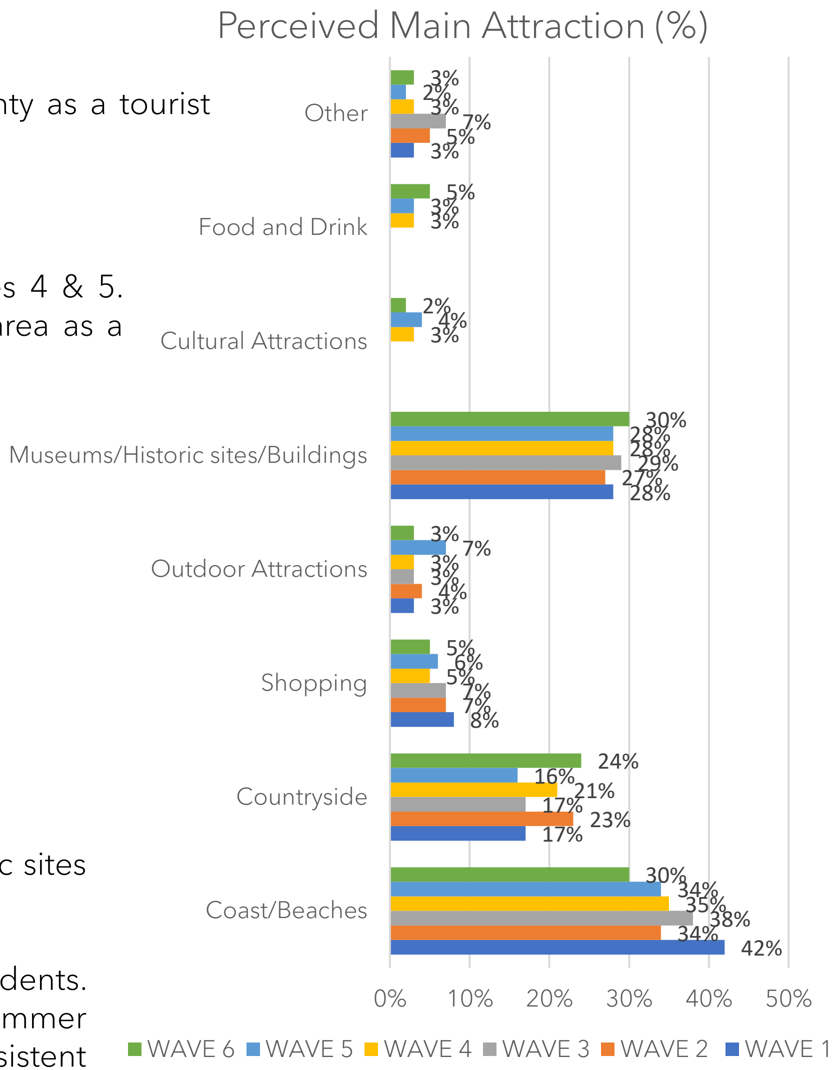
Do you consider your local area to be a tourist destination?

WAVE 1	WAVE 2	WAVE 3	WAVE 4	WAVE 5	WAVE 6
Yes 67%	Yes 65%	Yes 63%	Yes 72%	Yes 71%	Yes 72%

Main Attraction

- In wave 6, the largest proportion of respondents perceived the coast/beaches and museums/historic sites (both **30%**) as their areas' main attractions, followed by the countryside (**24%**).

- Overall, results illustrate the strength of Kent's rural, historic and coastal offering in the minds of residents. When looking at seasonal differences, the coast was selected by a higher proportion in the Summer months and countryside more so in the Winter periods. Whereas, heritage attractions saw a consistent result throughout the year.



Financial Impact on Household & The Cost of Living Crisis

- Throughout each wave, the survey looked to gain a deeper understanding into residents' financial situation, to monitor the impact of the pandemic and the cost of living crisis on household finances.
- Please note that for waves 1-5, this question was asked with regards to the impact of COVID-19, whereas for wave 6, this question was reworded to – 'Due to the increase of cost of living, has your household's financial situation…'.
- Looking at results across each wave, the largest proportion of residents up until wave 5 stated their household finances have stayed the same.

Impact to Household Finances

	WAVE 1	WAVE 2	WAVE 3	WAVE 4	WAVE 5	WAVE 6
Improved	9%	16%	15%	10%	10%	1%
Stayed the same	55%	55%	55%	50%	47%	28%
Worsened slightly	27%	22%	22%	31%	34%	59%
Worsened significantly	9%	8%	9%	10%	9%	12%

- However, since wave 4 there has been a steady increase in respondents stating finances had worsened to some degree, with this seeing the sharpest increase in wave 6 (+28%). This ongoing shift is likely due to the cost of living crisis, with the last few waves seeing increases to fuel prices, inflation, electricity prices and mortgage rates, which will have all had a significant impact for many households.

In wave 6, respondents were also asked - *How has the increase to cost of living affected your wellbeing?* The following themes emerged.

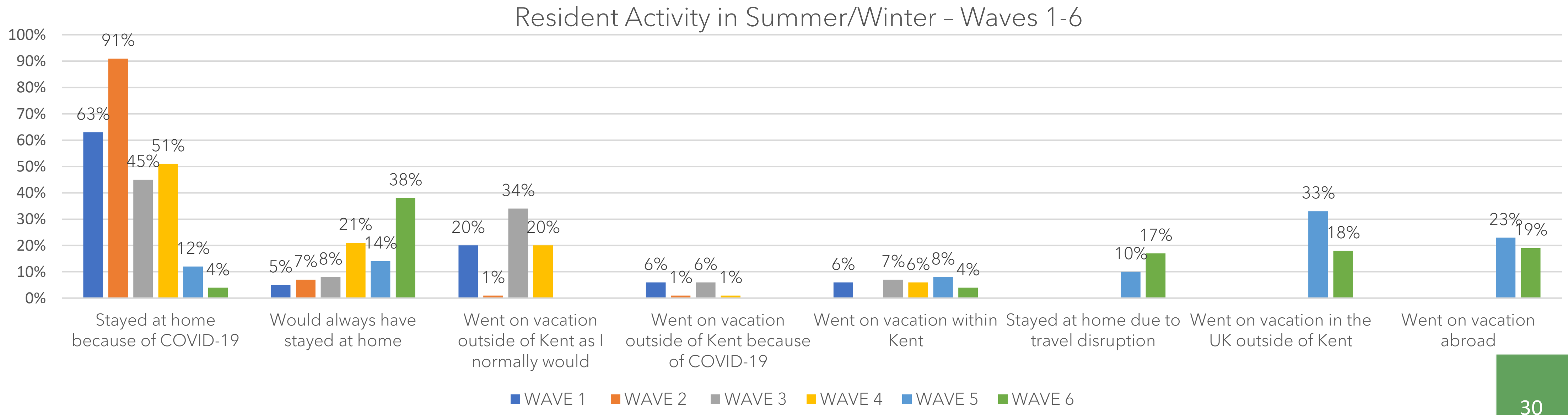
Not eating out as much	Being more frugal with spending & having less disposable income	Limiting social activities & having to budget more	Taking leisure trips closer to home & limiting car use	Less likely to be able to afford days out & visits to attractions
Feeling more concerned about the future	Increase in anxiousness, stress & worry	Concerns about retirement plans & reliance on pensions	Having to focus more on the essentials and looking for things that are free to do	More conscious of heating and electricity use

Resident Activity

- Looking at respondent's activity in Winter 2022/23, the largest proportion stated they stayed at home as they normally would (**38%**), followed by **19%** who went abroad. In contrast, in Summer 2022, the largest proportion went on a trip in the UK, outside of Kent (**33%**), which in wave 6 declined to **18%**. Findings also show that only **4%** of residents went on a trip within Kent in Winter 2022/23, compared to **8%** in Summer 2022.

- Overall, across each wave the percentage of respondents staying at home due to COVID-19 has gradually decreased, which at various times demonstrated growing consumer confidence and the emergence from the pandemic. However, as options were adapted, results for wave 6 also show that **17%** of residents stayed at home due to travel disruptions, an increase of **+7%** vs. wave 5. Therefore, this does indicate that for some residents traffic locally is an issue and a barrier to travel.

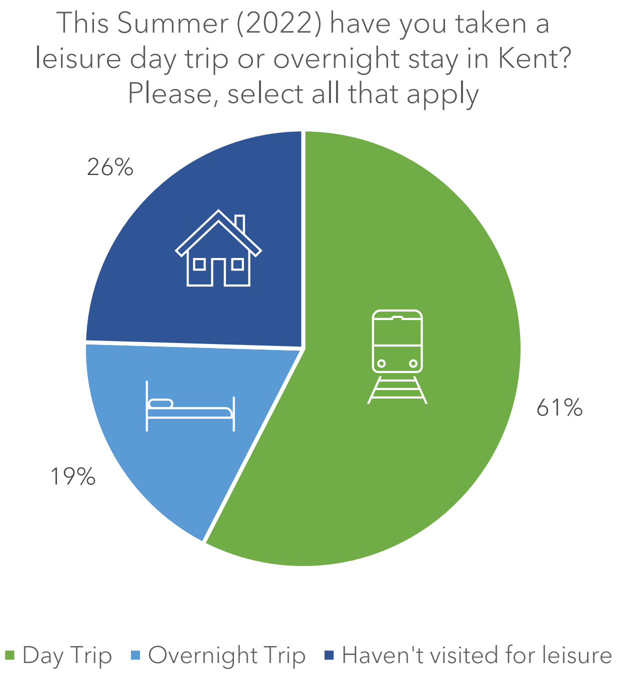
- Overall, results show an appetite for leisure trips closer to home and domestically, which may be further driven by the cost of living crisis, with people looking to spend less but still have memorable travel experiences. However, when looking at key differences by season, findings may show that residents aren't as likely to take leisure trips in the Winter compared to Summer. Furthermore, this present an opportunity to further work to promote and encourage visitation locally in the off-season, strongly highlighting the importance and reliance on quality accommodation provision in the county.

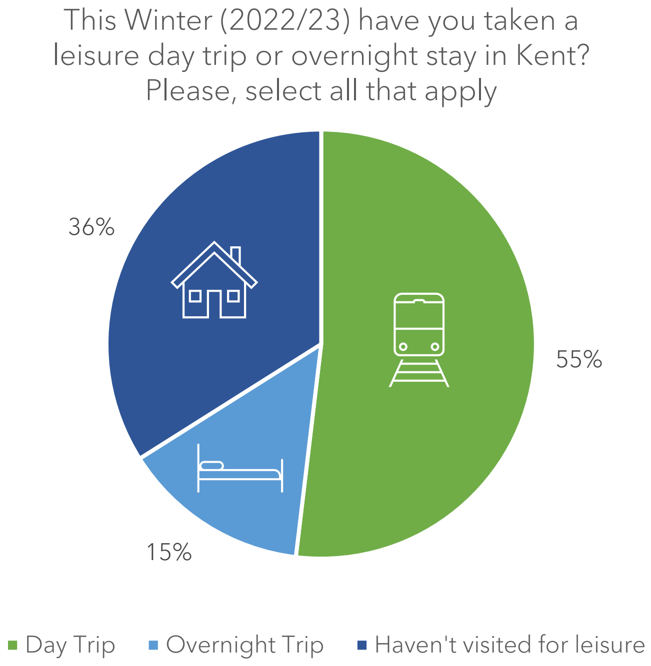


Graph showing Kent resident activity in winter 2022/23 BASE= 686

Leisure Trips

- In order to gain a deeper insight into residents' leisure travel behaviour, respondents were also asked if they had taken various types of leisure trips in Kent.
- Findings show that in wave 6, the majority of respondents had taken a day trip (**55%**) in Winter 2022/23, although this saw a decrease of **-6%** vs. wave 5 in Summer 2022.
- This was followed by **36%** who stated they haven't visited the county for leisure and by **15%** who had taken an overnight trip, with the former seeing an increase of **+10%** vs. the previous Summer.
- These results firstly show that there is an appetite for day and overnight trips, and factoring in insights from the previous question, there is an opportunity to increase trips in the Winter period.

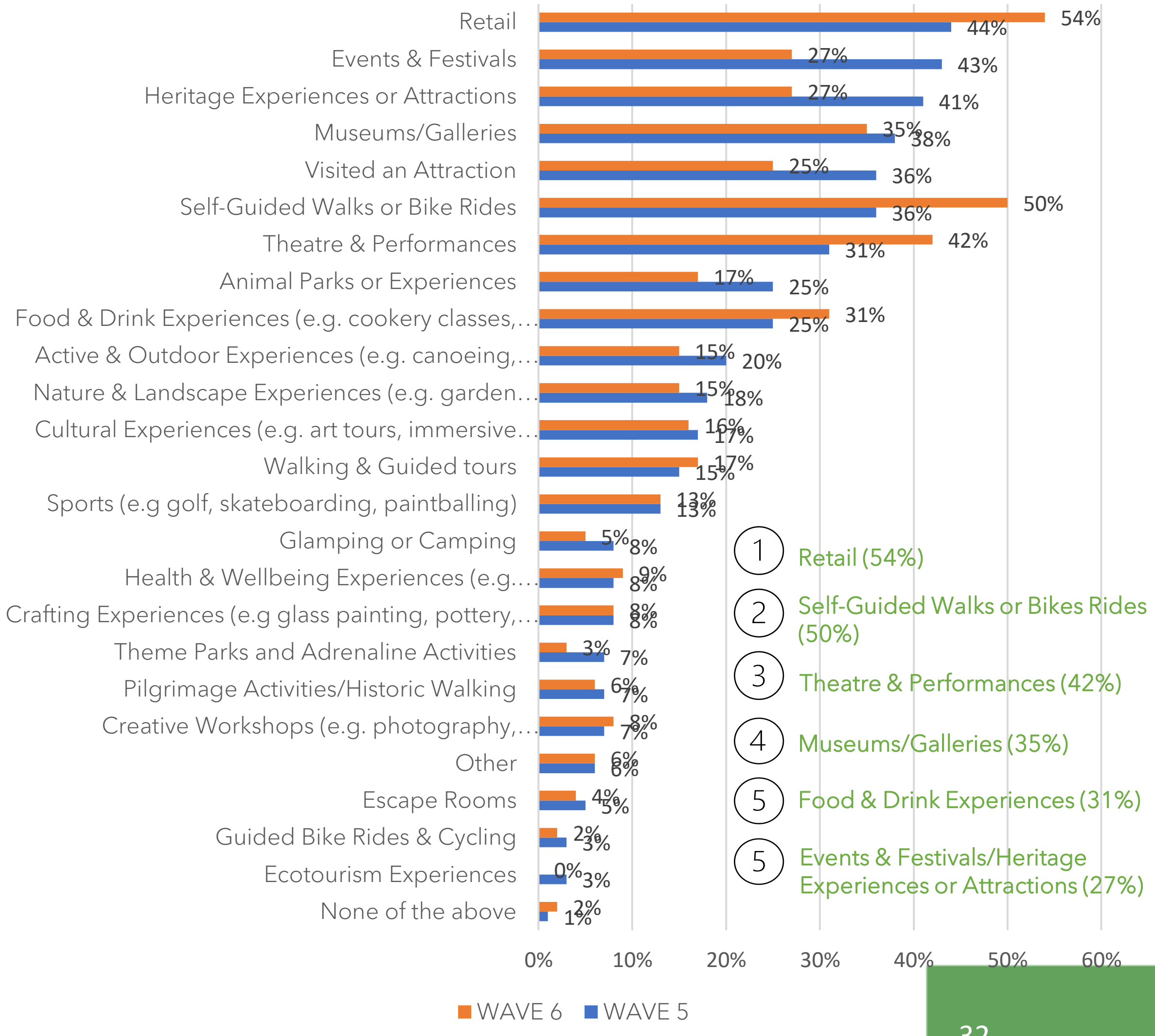




Waves 5 and 6 presented residents with a series of experiences and activities and asked them to specify if they had participated in any that Summer or Winter.

- Looking at responses for both waves, retail was the most commonly selected activity in both seasons, with this being **+10%** higher in Winter vs. Summer (**54%** vs. **44%**).
- In Summer, this was followed by events and festivals, whereas in Winter retail was closely followed by self-guided walks or bike rides. This response may indicate that while events were still in the top five in Winter, they may be more popular during the Summer months. Findings may also show that residents engage with walks and bike rides more so in the off-season, which aligns with the countryside being perceived as residents' main attraction more so in Winter, and links with Winter and new year's walking content. This could also be due to various other activities being mostly available in the Summer.
- Museums & galleries and heritage experiences/attractions, ranked fairly similar in each season, again demonstrating the strength of Kent's heritage and historical offering year-round. However, when looking at notable differences between each wave, theatre & performances ranked more highly in Winter, alongside food & drink experiences. Consequently, this may highlight that there is an increased appetite for these types of activities in the off-season and can therefore be used when creating hyper-local content.
- These insights will be key in helping to further develop the hyper-local market and position local experiences and attractions to local residents and their visiting friends and family. This can also help to inform content and campaigns and tailor content to focus on activities and experiences that may appeal more so certain seasons. However, these insights may also help to increase the provision of certain activities in the off-season, to further promote visitor dispersal and increase resident engagement.

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



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.

- Similarly to wave 5, residents were most likely to have visited locally with their partner, family or groups of friends. Comparing responses by season, mentions of family were more prominent in the Winter wave, which may be due to residents spending more time with family over the festive period.

- Again, 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.

- While responses in Summer centred more on the coastal offering, including coastal towns, Blue Flag beaches and visits to outdoor sites such as wildlife parks and events, responses in Winter did differ slightly.

- In wave 6, visits to heritage attractions were still prominent, but in Winter respondents were more likely to mention the countryside and countryside walks, alongside local restaurants, pubs and local food and drink.

VFR Visits

- Results show that **49%** of residents have had friends and relatives to stay with them in the last 6 months for leisure purposes, with this percentage seeing a steady increase across each wave.
- This demonstrates an ongoing opportunity to continue to incorporate this within messaging and campaigns to the local market to further encourage VFR visitation and showcase places for residents to visit with their friends and relatives in both the Summer and off-season.
- Furthermore, this increase could also be indicative of people looking to make leisure visits and stay with friends and relatives as a more cost-effective accommodation option, given the cost of living crisis and people looking to be more frugal with spending.

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

Yes

34% 46% 49%

WAVE 4 WAVE 5 WAVE 6

Since wave 4, the survey asked respondents – *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?* For each wave, responses were categorised thematically, as shown in the diagram below, which incorporates responses from all waves.

- Each wave has shown a similar picture, with residents most commonly looking to heritage attractions such as castles and museums, including attractions such Leeds and Dover Castle. This also included National Trust properties, alongside Canterbury Cathedral, the Historic Dockyard, Chatham and the White Cliffs. The most popular destinations included Canterbury, Dover and Rochester, in addition to Folkestone, Whitstable and Broadstairs.

- Looking at other themes, the countryside and outdoor areas, the coast, together with the food & drink offering and walking came across each wave. However, when looking at seasonal differences, residents were more likely to cite a wider variety of outdoor areas, including gardens, rivers and vineyards, alongside the coast in the Summer waves. Moreover, these findings will help to further shape content for the hyper-local market moving forward, particularly with regards to VFR content.

Attractions

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

Destinations

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

Countryside/Outdoors

Parks & Gardens
Nature & Wildlife
Rivers
Vineyards
Countryside areas
The North Downs
Country parks & walks

Coastal

Beaches
The Coast
Coastal towns
Coastal walks

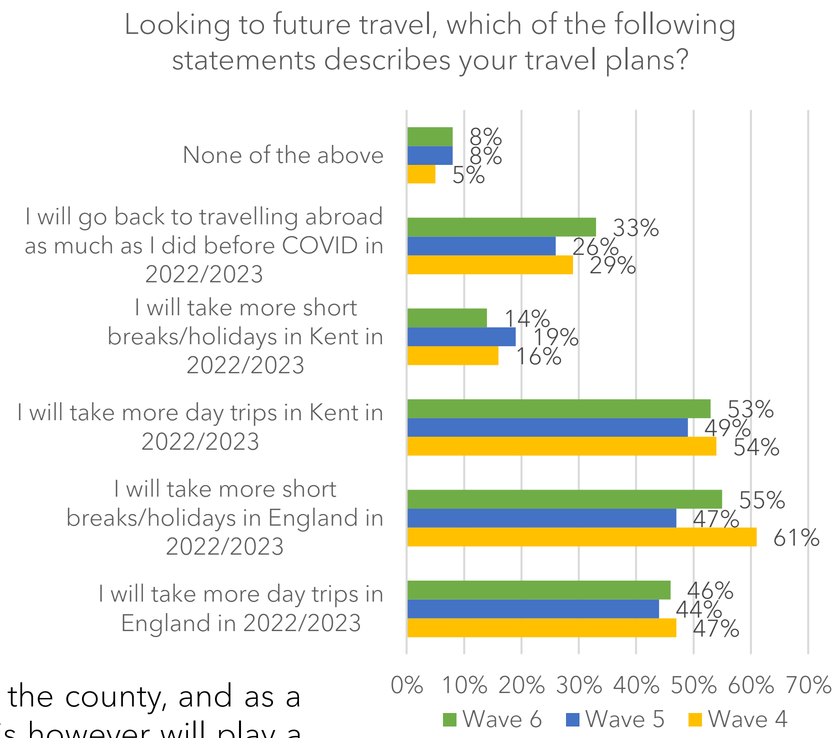
Food, Drink & Walking

Walking
Local Restaurants
Country/Local pubs
Exploring the town

Leisure 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?	WAVE 4	WAVE 5	WAVE 6
I have not changed my holiday plans or choices as a result of COVID	18%	30%	38%
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%	37%
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%	25%

- Since wave 4, respondents were asked if they have made any changes to their leisure travel behaviour due to the pandemic. When looking at results across each wave, results clearly show that the percentage of respondents who have not changed their holiday plans has gradually increased, with this standing at **38%** in wave 6. In support of this, the percentage who stated they have made changes but they were short-term, has declined gradually also, standing at **37%** in wave 6.
- While it is clear that for many consumer confidence has increased and the impact of COVID-19 on leisure travel behaviour has diminished, a substantial proportion still feel that they have made short-term changes that will either last for the next year or two or perhaps longer into the future. However, it may be that these changes result in more looking to take trips closer to home.
- In terms of future travel intentions, findings from the last 3 waves indicate that respondents have displayed a consistent interest in taking more day trips in England, with interest in taking more short-breaks in England seeing a slight dip in wave 5, however this increased slightly to **55%** in wave 6.
- In terms of taking more day trips in Kent, in wave 6 this stood at **53%,** which similar to England and has been fairly consistent across each wave. When looking at overnight trips within the county, this was higher in wave 5, compared to waves 4 and 6, which may indicate that short-breaks are more appealing to local residents in the Summer season.
- Finally, wave 6 shows that **33%** of residents stated they will go back to travelling abroad as much as they did prior to the pandemic, although this only represents a third of residents, which does indicate that for the majority they have made changes to their overseas travel behaviour.



- Overall, results do indicate that there is an appetite for both domestic trips within the UK and within the county, and as a result there is an opportunity to promote staycations and day trips within Kent. The cost of living crisis however will play a significant role in consumer travel behaviour moving forward, as people may look to balance travel and experiences while being more conscious of spending and look to make savings on things such as accommodation and eating out.

Sources of Information

The survey asked residents which sources of information they use to plan a leisure trip within the county. Across each wave, the top three sources remained unchanged, with the percentages below showing responses from wave 6.

1. Specific attraction websites (67%)
2. Kent destination websites (56%)
3. Review website e.g. TripAdvisor (49%)

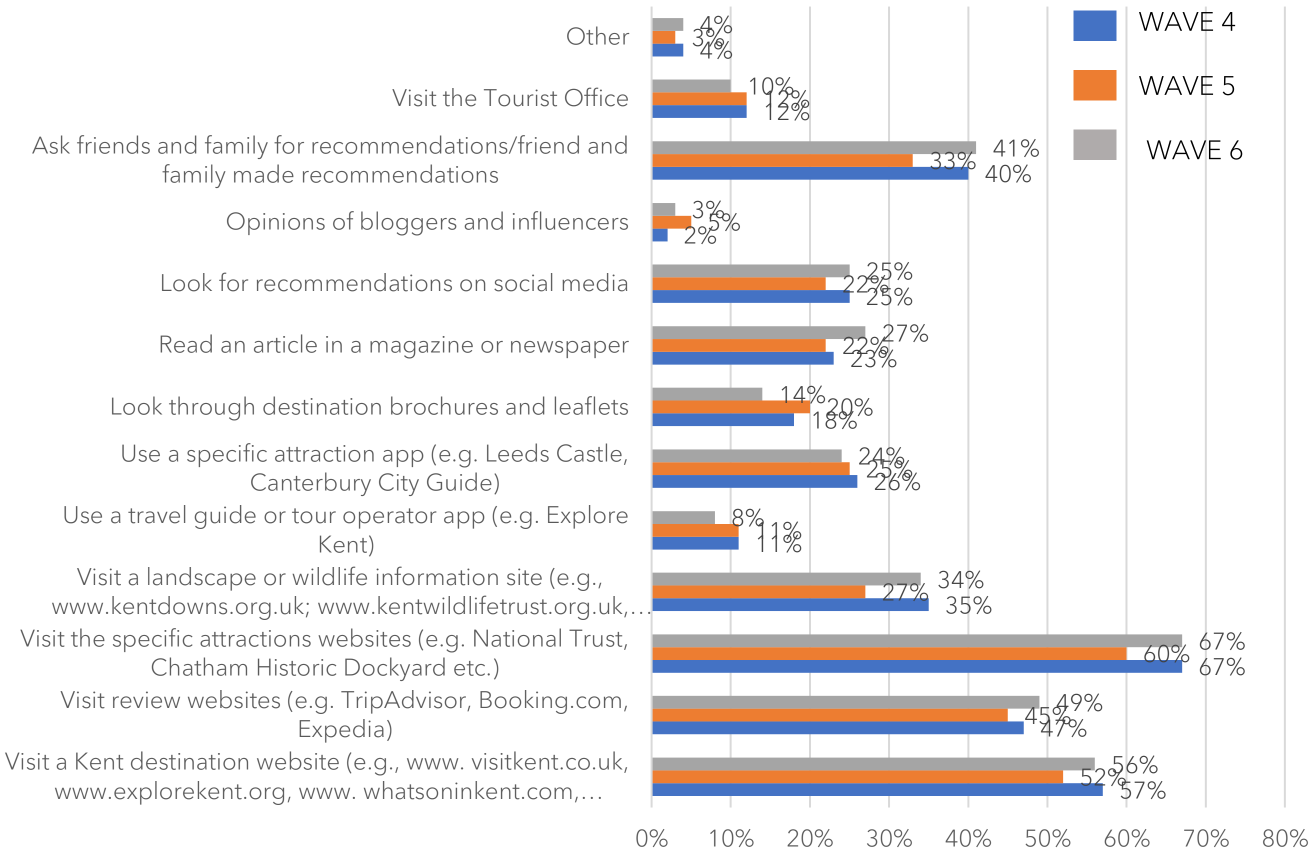
Followed by…

Ask friends & family for recommendations 41%

Landscape or wildlife information site 34%

- Mirroring waves 4 & 5, 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 across each wave, highlighting the power of reviews and maintaining high levels of satisfaction.
- In terms of targeting the local audience, it will be important to focus on key channels but also to utilise different platforms for various demographics such as age/audience. More information on preferences can be found in the key findings and recommendations section of this report.

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 **87%** of residents agreed that they support Winter tourism in their local area, a sentiment that has been consistent across each wave regardless of season.
- A significant proportion of residents (**63%**) agreed that working in the tourism and hospitality industry is an attractive career, with a strong level of agreement across each wave this was asked.
- This shows that overall working in the tourism industry is seen positively among residents, and that activity should look to continue championing working in the sector and providing quality long-term jobs for local communities.
- In wave 6, **82%** of respondents stated that the overall impact of tourism on Kent is positive, with a steady level of agreement seen across all six waves.

Overall impact of tourism on Kent?

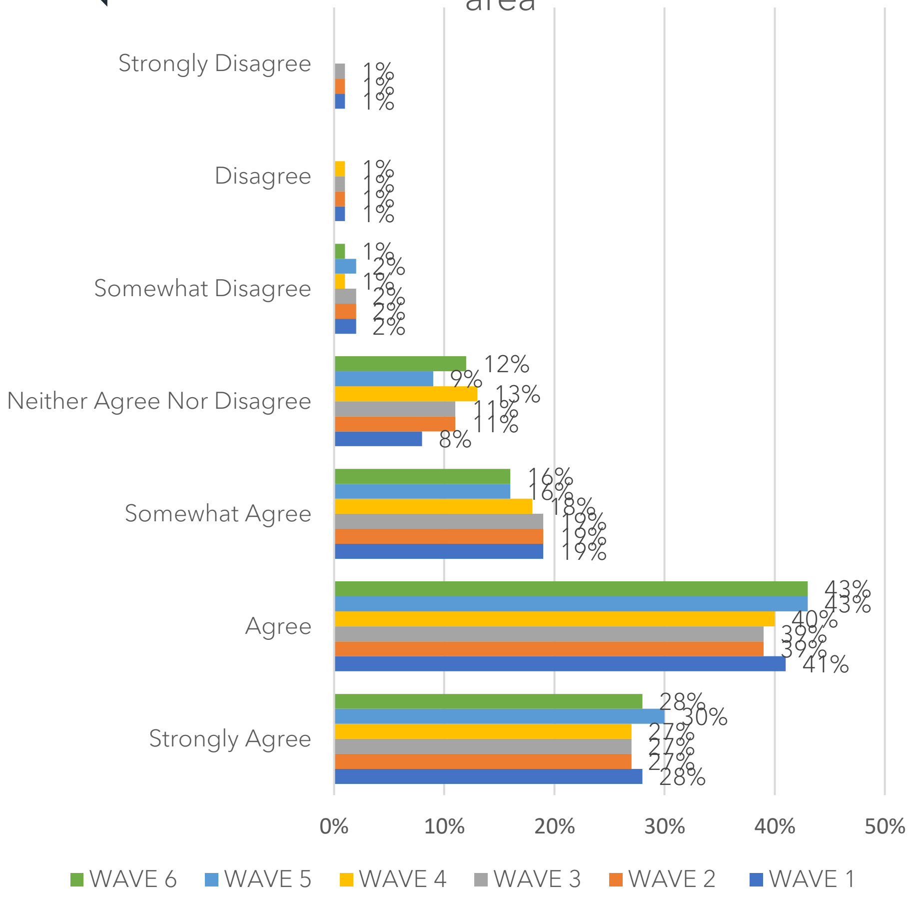
Positive	Negative	Don't Know/Neutral
82%	**3%**	**16%**

BASE= 686

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

Yes	No
63%	37%

Resident support of tourism in their local area



Graph showing the % of respondents and their level of agreement with the statement 'I support tourism summer/winter in my local area'
BASE= 686

Top Positive & Negative Impacts of Tourism

Respondents were asked to specify the top three positive and negative impacts of tourism on their local area. The word clouds below illustrate the most frequently mentioned words from wave 6, indicated by the size of the words displayed.

- Across each wave similar themes emerged, with the main positive benefits centred around the economic benefits tourism can bring to the county, alongside employment opportunities and inward investment opportunities. Other benefits included tourism helping to improve facilities and increase demand for attractions, in addition to helping to keep resident s' local area vibrant.

- However, in terms of negative impacts the most common issues mentioned included issues around traffic and congestion, alongside tourism's negative impact on the natural environment and local wildlife, including litter and pollution. Other concerns included lack of parking availability, overcrowding and high costs and house prices.

Positive

Negative

Additional Comments

Finally, the survey also gave respondents the opportunity to leave any additional comments they might have about the impact of tourism on their local area, or regarding the answers given throughout the survey. The following diagram presents a sample of comments given in wave 6.

"I love Kent and it's huge variety of attractions"

"Insufficient opportunities for cyclists in my immediate area and poor local public transport, apart from rail link to London"

"Rochester Sweep & Dickens festivals & Christmas markets are now too popular that I don't go anymore as too crowded. Leeds Castle is also too busy when events are on. Certain places like these have become too popular"

"More recreational and leisure facilities required. Toilets needed in more local areas and need to be improved"

"Tourism needs to balance with the needs of local people, i.e. facilities like parks, pools, playgrounds need to be renovated and expanded to support mental health for residents"

"I support tourism projects as long as the infrastructure is growing alongside too"

"Broadly, tourism in Folkestone & Hythe is positive and it's lovely to share this beautiful part of the world with others. If properly invested in, tourism makes a positive local contribution all year round. However, this requires adequate provision from local councils"

"Sadly restaurants and cafes are closing due to rates and lack of staff"

"I would like to visit more local attractions but they are too expensive. Tourists are likely to have more disposable income by nature of the fact they are on holiday, and attractions price themselves with that in mind, not for local people who maybe cannot afford a holiday but would like to do day trips"

"Local facilities are neglected, and opening times are tourist based"

""In general, provided it is managed correctly, tourism will bring benefits to Kent"

Key Takeaways & Recommendations

The Environment

- Throughout each wave, findings show that respondents are likely to agree that tourism is harmful to the natural environment, with this being higher in the Summer season, likely due to increased visitation. In contrast, results also show that on average 50% of respondents agree on some level that tourism can also be a catalyst for preserving and protecting the environment.
- Overall, this shows that residents do acknowledge tourism's ability to reinvest revenue and efforts back into the environment, and that tourism can be a mechanism for funding and grant opportunities, to facilitate conservation projects and initiatives. However, responses highlighted that revenue needs to be effectively managed, and that footfall needs to be minimised in certain areas to maintain vital natural and heritage assets.
- Moving forward, these findings demonstrate the importance of sustainability activity at both destination and local-level, alongside the need to focus on visitor dispersal and nature-positive initiatives. This activity should continue to focus on shifting visitor behaviour through effective consumer messaging to both educate and inspire visitors to make this behavioural change. This can also include sharing examples of best practice through business case studies, to both inspire other businesses to make similar changes, while also helping to shift visitors' and residents' perceptions around the necessary efforts to help conserve and protect the environment.

Parking

- Residents' growing concern around tourism's impact on parking availability and therefore continues to be an area that could see improvement. To help facilitate this, work around promoting use of public transport both to and within the destination could in turn help ease traffic issues and increase the availability of parking locally. In support of this, responses have also shown that for some respondents traffic issues locally has been a barrier to travelling, which continues to show the importance and need for lobbying for the county around traffic challenges.

Local Transport

- There is a need to continue to work to improve perceptions around public transport, which will have been negatively impacted somewhat by the recent industrial rail action. Moving forward, it will be important to continue to work closely and collaboratively with key transport providers at destination level, while working to provide and promote cost-effective ticket options and increased services and activity around last-mile solutions.

Visitor Interaction

- Residents view visitor interaction and presence positively, illustrating growing consumer confidence following the pandemic. This sentiment will also help to foster a welcoming and friendly destination for visitors, creating a strong sense of place and helping to facilitate tourism development. Findings also demonstrate that for a significant proportion of residents, visitor presence may help to create a stronger connection with their local area, contributing towards a more vibrant area and an increased sense of place for residents also.

Key Findings & Recommendations

Local Investment & Infrastructure

- Overall, results show that residents acknowledge that tourism is a key driver for improving local investment, development and infrastructure spending in the local economy. Consequently, this demonstrates that it will be vital to continue to share ongoing or planned local development opportunities, to ensure that this positive perception is maintained and that tourism activity continues to focus on accessing funding opportunities to improve the provision of local infrastructure in a sustainable way.

Visitor Footfall & Resident Engagement

- Overall, findings show that residents are more likely to have observed an increase in visitor footfall in Summer compared to Winter. The availability and provision of things to do in residents' local areas are higher in Summer, and therefore may support the notion that the tourism offering in the off-season could be developed further. This also supports work and activities to extend the season, to ensure that residents are able to access and visit local attractions and facilities all year round.
- This also highlights the need to continue to work on visitor dispersal particularly in tourism hotspots, which in turn may have a negative impact on natural and heritage assets. However, when looking at residents' views towards their ability to access and engage with local attractions and facilities overall, it is somewhat of a balance. While they do acknowledge that tourism helps to facilitate and increase the availability of places to visit, some residents do feel that potentially due to overcrowding in the Summer season, they aren't as easily able to access these. Moreover, this may present an opportunity to further develop the provision of attractions and facilities on offer in the Winter months, to ensure that residents can enjoy these all year round.

Working from Home

- Findings have continued to demonstrate the growing adoption of hybrid working measures among organisations following the pandemic, and, as a consequence, residents are spending more time in their local areas. Residents engage more so with green and outdoor spaces for walking and cycling when working from home, however engagement with these and local cafes/shops are potentially higher in the Summer vs. Winter. It will be important to continue to promote green spaces to help contribute further towards residents' wellbeing, particularly in the off-season and in urban areas. However, results may also demonstrate that due to the cost of living crisis residents may not seek to visit cafes and local shops as frequently.

Wellbeing & Emotional Connection

- Results have continued to demonstrate that residents do have a strong sense of wellbeing and emotional connection with their local area. A steady level of agreement that respondents live in a beautiful area is apparent, demonstrating a sense of pride. Alongside this, overall respondents have agreed they are satisfied with their life, while also feeling safe and calm living in their local area. However, it will be important to continue to monitor residents' quality of life, and focus on initiatives that look to improve wellbeing, particularly in the Winter, and given the impact of the cost of living crisis.

Key Findings & Recommendations

Key Findings & Recommendations

Leisure Behaviour Insights

- A significant proportion of respondents have continued to consider their local area to be a tourist destination, showing great support towards encouraging stays locally, with many potentially considering their area and other areas in the county as leisure destinations.

- Many respondents have had friends and relatives to stay with them in the last six months for leisure purposes, which again highlights the appeal of the area and that residents want to showcase this. Furthermore, this highlights that VRF visits are a key market opportunity, to increase visitation in both the Summer, but maybe even more of an off-season opportunity.

- When looking at travel behaviour, results show that there is an appetite for leisure trips closer to home, both in terms of day trips and overnight visits, which may be further driven by the cost of living crisis. However, results do show that residents aren't as likely to take trips in the Winter compared to Summer, with this presenting an opportunity to continue to promote and develop the off-season offering.

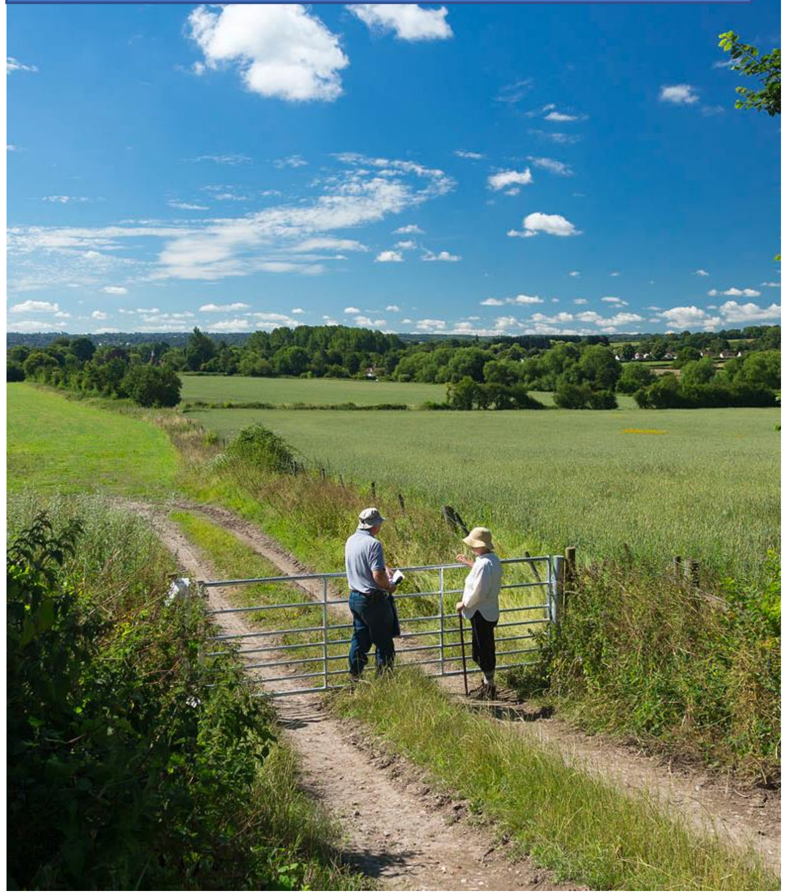
- In terms of activities that residents look for, results show that retail was the top selected activity in both seasons, although this was higher in Winter. Findings also show that heritage and historical attractions have an appeal all year-around.

- However, looking at seasonal differences, in Winter interest centred more around countryside walks and the theatre. Whereas in the Summer, residents looked more to events and festivals. Focusing on more experiential activities, overall results show that food & drink experiences were most popular overall, mirroring results from the Visit Kent Perception Research Study.

Sources of Information

- Looking at sources of information to use when targeting the hyper-local market, results have consistently shown high engagement with destination, attraction and landscape websites and therefore demonstrate the importance of maintaining and sharing inspirational content on these channels. Alongside this, review websites and recommendations from friends and family are also key, highlighting the power of reviews and maintaining high levels of satisfaction.
- Interestingly, respondents are more likely to look to recommendations from friends and family and websites in Winter. This may show that in the off-season residents are more unsure of what there is to do and therefore seek out information from these sources more so. But overall, these insights should be used to effectively communicate with residents and promote overnight stays and days out locally, both in the Summer and Winter seasons.

Key Findings & Recommendations



Cost of Living

- Results show an increase in the number of respondents whose household finances have worsened, likely due to the cost of living crisis.
- Moving forward, consumers will still very much look to prioritise travel and create memorable experiences, however the cost of living crisis will play a role, with both visitors and residents looking to make savings on things such as eating out and accommodation and being more conscious of spending habits and priorities.
- Therefore, it will be important to ensure this is incorporated within marketing content by utilising and showcasing the range of free things to do, packaged together with quality attractions, experiences and accommodation all year round. Focus should also be on communicating the value of these visits.
- Findings also show that only a third of respondents stated they will go back to travelling abroad as much as they did prior to the pandemic, which indicates that the majority have made changes to their behaviour regarding overseas travel. Consequently, this shift may result in more residents and visitors looking to take trips closer to home, potentially driven by the increase in the cost of living.
- Travel behaviour around visiting friends and relatives may also present a more cost-effective accommodation option, freeing up more money to spend on things to do while away. This benefit therefore may help to drive this market further.

Overall Support

- Results have consistently shown that residents have expressed a strong level of support for tourism in their local area, with the majority also agreeing that working in the tourism and hospitality industry can be an attractive career. Furthermore, the latter also shows that activity should continue to champion working in the sector and to strive to provide quality long-term jobs for local communities in both the peak and off- season, improving the welcome and the overall experience.

The following insights outline findings by age across each wave, to help further develop local audience insights and inform effective targeting and content creation

18-34

- Most likely to use social media recommendations & bloggers & influencers
- They expressed the most interest in taking more short-breaks in Kent and were least likely to make changes to future travel due to COVID-19
- More likely to positively perceive public transport use and are more 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
- Look for experiential activities such as, ghost tours, escape rooms and strawberry picking, alongside food & drink, events and festivals and guided bike rides & cycling
- Beaches favoured highly, followed by countryside and heritage
- More likely to have taken an overnight trip in Kent & more likely to have had VRF visits
- More likely to have taken part in experiences based around food & drink, active & outdoors, culture & creative and crafting activities as well as health & wellbeing

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
- 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 longer-term due to COVID-19
- Favour destinations such as Canterbury, Dover, Whitstable & Rochester & attractions including Leeds, Dover & Hever Castles & the Historic Dockyard, Chatham
- Look for National Trust properties, coastal areas, parks, walking, wildlife attractions, countryside & heritage, retail and events & festivals

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 rather 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 Castles, 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. Also interested in theatre & performances, self-guided walks or bike rides

-

The following outlines key insights by other demographics from waves 1-5.

KDAONB

- More likely to be concerned about tourism's harmful impacts on the environment but at the same time are more aware of initiatives to help preserve and enhance the environment
- More likely to engage with outdoor and green spaces for walking and cycling more frequently when working from home
- More likely to consider their local area as a tourist destination and were more likely to have had friends or relatives to stay in the last six months for leisure purposes
- Displayed increased wellbeing and emotional benefits, including an increased sense of pride and connection with their local area, alongside feeling an increased sense of calm and relaxation
- More likely to agree that they live in a beautiful area

Urban

- Overall, they were more likely to agree that there are too many visitors in their local area
- More likely to agree that local infrastructure and public transport services are improving
- More likely to use local shops and cafes more frequently when working from home, but green spaces less so
- More likely to express an interest in taking more short-breaks in the county in the future

Rural

- Findings may show that those living in a village were less likely to agree that local infrastructure is improving, alongside local infrastructure development and transport connections
- Overall, those living in either a village or rural setting were less likely to engage with local cafes and shops when working from home, however they were more likely to engage with green spaces
- In several waves these areas were more likely to be concerned about tourism's harmful impact to the natural environment

Footfall

- Overall, findings show that residents are more likely to observe an increase in footfall in the Summer months, and during these periods those living in coastal areas were more likely to receive an influx of visitors.
- When looking at district, Folkestone & Hythe, Canterbury, Thanet and Dover were more likely to observe an increase in visitors in most survey periods. Consequently, this may show that these areas in particular are popular with visitors and tourism hotspots, and that residents living there may be more affected by overcrowding.

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%
WAVE 6	34%	40%	18%	5%	3%	1%	0%	92%	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%
WAVE 6	39%	48%	12%	4%	2%	1%	0%	99%	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%
WAVE 6	18%	39%	22%	10%	8%	2%	1%	79%	11%
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%
WAVE 6	3%	7%	38%	19%	19%	12%	2%	48%	33%
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%
WAVE 6	11%	19%	34%	18%	9%	7%	2%	64%	18%

There are too many visitors in my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
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%
WAVE 6	1%	2%	7%	25%	21%	33%	11%	10%	65%
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%
WAVE 6	11%	37%	22%	24%	3%	3%	1%	70%	7%
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%
WAVE 6	5%	16%	29%	27%	19%	4%	1%	50%	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%
WAVE 6	25%	46%	17%	7%	3%	2%	1%	88%	6%
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%
WAVE 6	32%	44%	17%	5%	2%	0%	1%	93%	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%
WAVE 6	18%	38%	23%	12%	7%	1%	1%	79%	9%
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%
WAVE 6	2%	7%	7%	26%	28%	17%	13%	16%	58%
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%
WAVE 6	5%	14%	24%	37%	13%	6%	1%	43%	20%

Tourism reduces my ability to access local services and facilities	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
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%
WAVE 6	2%	5%	10%	30%	24%	24%	5%	17%	53%
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%
WAVE 6	6%	19%	22%	19%	21%	9%	4%	47%	34%
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%
WAVE 5	25%	47%	17%	7%	3%	1%	0%	89%	4%
WAVE 6	28%	48%	13%	8%	2%	1%	0%	89%	3%
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%
WAVE 5	23%	50%	16%	6%	3%	1%	0%	89%	4%
WAVE 6	28%	47%	18%	5%	2%	1%	0%	93%	3%
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%
WAVE 6	16%	35%	20%	21%	4%	3%	1%	71%	8%
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%
WAVE 6	16%	36%	24%	14%	7%	3%	1%	76%	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%
WAVE 6	6%	19%	21%	39%	8%	5%	2%	46%	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%
WAVE 6	37%	39%	7%	9%	2%	4%	2%	83%	8%
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%
WAVE 6	19%	46%	21%	6%	5%	2%	1%	86%	8%
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%
WAVE 6	11%	39%	24%	15%	9%	3%	0%	74%	12%
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%
WAVE 6	2%	1%	6%	8%	8%	38%	39%	9%	85%
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%
WAVE 6	12%	26%	29%	13%	13%	5%	2%	67%	20%

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%
WAVE 5	26%	34%	20%	10%	6%	3%	1%	80%	10%
WAVE 6	27%	34%	21%	7%	7%	3%	1%	82%	11%
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%	9%
WAVE 6	19%	37%	22%	14%	4%	3%	1%	78%	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%
WAVE 5	22%	32%	39%	6%	1%	54%	7%
WAVE 6	5%	15%	61%	11%	8%	20%	19%
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%
WAVE 6	4%	16%	66%	12%	3%	20%	15%
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%
WAVE 6	2%	21%	56%	17%	5%	23%	22%
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%
WAVE 6	1%	11%	51%	31%	6%	12%	37%
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%
WAVE 6	2%	17%	56%	21%	5%	19%	26%
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%
WAVE 6	2%	27%	38%	26%	8%	29%	34%

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%
WAVE 5	30%	43%	16%	9%	2%	0%	0%	89%	2%
WAVE 6	28%	43%	16%	12%	1%	0%	0%	87%	1%

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	Stayed at home due to travel disruption	Went on vacation in the UK outside of Kent	Went on vacation abroad
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%			
WAVE 5	12%	14%	N/A	N/A	8%	10%	33%	23%
WAVE 6	4%	38%	N/A	N/A	4%	17%	18%	19%

Are you?	Male	Female	Prefer not to say
WAVE 1	27%	73%	1%
WAVE 2	32%	66%	1%
WAVE 3	33%	66%	1%
WAVE 4	31%	69%	1%
WAVE 5	42%	57%	
WAVE 6	27%	73%	0%

What is your age category?	18-34	35-64	65 and above	Prefer not to say
WAVE 1	8%	64%	27%	1%
WAVE 2	16%	58%	24%	2%
WAVE 3	15%	61%	23%	1%
WAVE 4	6%	62%	31%	2%
WAVE 5	17%	54%	28%	1%
WAVE 6	5%	63%	31%	1%

Please select the highest education level that you have achieved	O level, GCSE, NVQ l. 1-2	A level, AS/A2 level, NVQ l. 3-4	Undergraduate degree, BA, BSc	Postgraduate degree, MA, MSc, PhD	Prefer not to say
WAVE 1	20%	27%	29%	13%	10%
WAVE 2	16%	24%	35%	17%	8%
WAVE 3	17%	25%	33%	17%	9%
WAVE 4	20%	27%	29%	16%	8%
WAVE 5	18%	23%	35%	14%	10%
WAVE 6	12%	23%	36%	21%	7%

What would best describe your area of residence?	Village	Town	City	Rural
WAVE 1	32%	57%	4%	6%
WAVE 2	30%	58%	5%	6%
WAVE 3	29%	60%	5%	5%
WAVE 4	31%	58%	5%	6%
WAVE 5	26%	58%	12%	4%
WAVE 6	36%	52%	5%	8%

Does anyone in your household work in the tourism industry?	Yes	No
WAVE 1	7%	93%
WAVE 2	10%	90%
WAVE 3	6%	94%
WAVE 4	9%	91%
WAVE 5	18%	82%
WAVE 6	7%	93%

Please specify the number of years you have lived in your local area:	Under 5	5 to 25	More than 25
WAVE 1	14%	40%	46%
WAVE 2	16%	41%	44%
WAVE 3	15%	42%	43%
WAVE 4	11%	39%	51%
WAVE 5	12%	42%	46%
WAVE 6	17%	38%	45%

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%
WAVE 5	10%	47%	34%	9%
WAVE 6	1%	28%	59%	12%

Do you consider your local area to be a tourist destination?	Yes	No
WAVE 1	67%	34%
WAVE 2	65%	35%
WAVE 3	63%	37%
WAVE 4	72%	28%
WAVE 5	71%	29%
WAVE 6	72%	28%

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%
WAVE 5	34%	16%	6%	7%	28%	4%	3%	2%
WAVE 6	30%	24%	5%	3%	30%	2%	5%	3%

Please specify your work status	Employed full-time	Employed part-time	Student	Retired	Unemployed	Self-employed
WAVE 1	39%	18%	0%	36%	7%	
WAVE 2	42%	17%	2%	30%	4%	
WAVE 3	44%	17%	1%	28%	5%	
WAVE 4	32%	16%	1%	37%	3%	7%
WAVE 5	37%	16%	1%	30%	3%	9%
WAVE 6	35%	14%	0%	37%	2%	10%

Overall, do you feel the impact of tourism on Kent is…?	Positive	Negative	Don't Know/Neutral
WAVE 1	88%	8%	4%
WAVE 2	87%	8%	5%
WAVE 3	87%	7%	7%
WAVE 4	78%	4%	14%
WAVE 5	76%	6%	18%
WAVE 6	82%	3%	16%

Are you in the Kent Downs AONB?	Yes	No
WAVE 2	19%	81%
WAVE 3	16%	84%
WAVE 4	20%	70%
WAVE 5	23%	64%
WAVE 6	23%	68%

Looking to future travel, which of the following statements describes your travel plans? Please select all that apply.	Wave 4	Wave 5	Wave 6
I will take more day trips in England in 2022/2023	47%	44%	46%
I will take more short breaks/holidays in England in 2022/2023	61%	47%	55%
I will take more day trips in Kent in 2022/2023	54%	49%	53%
I will take more short breaks/holidays in Kent in 2022/2023	16%	19%	14%
I will go back to travelling abroad as much as I did before COVID in 2022/2023	29%	26%	33%
None of the above	5%	8%	8%

Sources of Information	Wave 4	Wave 5	Wave 6
Visit a Kent destination website (e.g., www. visitkent.co.uk, www.explorekent.org, www. whatsoninkent.com, www.kentdowns.org.uk)	57%	52%	56%
Visit review websites (e.g. TripAdvisor, Booking.com, Expedia)	47%	45%	49%
Visit the specific attractions websites (e.g. National Trust, Chatham Historic Dockyard etc.)	67%	60%	67%
Visit a landscape or wildlife information site (e.g., www.kentdowns.org.uk; www.kentwildlifetrust.org.uk, Woodland Trust or RSPB)	35%	27%	34%
Use a travel guide or tour operator app (e.g. Explore Kent)	11%	11%	8%
Use a specific attraction app (e.g. Leeds Castle, Canterbury City Guide)	26%	25%	24%
Look through destination brochures and leaflets	18%	20%	14%
Read an article in a magazine or newspaper	23%	22%	27%
Look for recommendations on social media	25%	22%	25%
Opinions of bloggers and influencers	2%	5%	3%
Ask friends and family for recommendations/friend and family made recommendations	40%	33%	41%
Visit the Tourist Office	12%	12%	10%
Other	4%	3%	4%

Changes to travel behaviour	Wave 4	Wave 5	Wave 6
I have not changed my holiday plans or choices as a result of COVID	18%	30%	38%
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%	37%
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%	25%

Do you think that working in the tourism/hospitality industry is an attractive career?	Wave 4	Wave 5	Wave 6
Yes	62%	61%	63%
No	38%	39%	37%

Have you had any friends and relatives to stay with you in the last 6 months for leisure purposes?	Wave 4	Wave 5	Wave 6
Yes	34%	46%	49%
No	66%	54%	51%

Working Patterns	Wave 4	Wave 5	Wave 6
I have always travelled to work, and I have continued to do so over the pandemic	36%	36%	37%
I have always worked from home	12%	10%	10%
Since the pandemic, my organisation introduced working from home measures, but I have now returned to the workplace full-time	7%	17%	8%
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%	31%
Prior to the pandemic, I had already began working in a more hybrid way (for example working from home on certain days)	8%	11%	8%
Other	6%	3%	6%

When working from home, I use more local cafes and shops	Wave 4	Wave 5	Wave 6
Strongly agree	11%	8%	13%
Agree	17%	26%	21%
Somewhat agree	15%	19%	15%
Neither agree nor disagree	15%	12%	11%
Somewhat disagree	10%	12%	10%
Disagree	22%	14%	18%
Strongly disagree	11%	8%	13%

When working from home, I access outdoor green spaces for walks or cycling more frequently	Wave 4	Wave 5	Wave 6
Strongly agree	27%	21%	25%
Agree	26%	32%	32%
Somewhat agree	16%	22%	16%
Neither agree nor disagree	2%	7%	9%
Somewhat disagree	19%	13%	10%
Disagree	8%	3%	5%
Strongly disagree	3%	2%	3%

This summer have you taken a leisure day trip or overnight stay in Kent? Please, select all that apply	Wave 5	Wave 6
Day Trip	61%	55%
Overnight Trip	19%	15%
Haven't visited for leisure	26%	36%

Which of the following, if any, experiences or activities in Kent have you participated in this summer? Please select all that apply	Wave 5	Wave 6
None of the above	1%	2%
Ecotourism Experiences	3%	0%
Guided Bike Rides & Cycling	3%	2%
Escape Rooms	5%	4%
Other	6%	6%
Creative Workshops (e.g. photography, painting, wreath making)	7%	8%
Pilgrimage Activities/Historic Walking	7%	6%
Theme Parks and Adrenaline Activities	7%	3%
Crafting Experiences (e.g glass painting, pottery, jewellery making)	8%	8%
Health & Wellbeing Experiences (e.g. meditation, yoga, retreats, Tai Chi, spas)	8%	9%
Glamping or Camping	8%	5%
Sports (e.g golf, skateboarding, paintballing)	13%	13%
Walking & Guided tours	15%	17%
Cultural Experiences (e.g. art tours, immersive theatre)	17%	16%
Nature & Landscape Experiences (e.g. garden workshop, bushcraft, bird or sealing watching)	18%	15%
Active & Outdoor Experiences (e.g. canoeing, archery, mountain biking)	20%	15%
Food & Drink Experiences (e.g. cookery classes, brewery tours, vineyards, foraging)	25%	31%
Animal Parks or Experiences	25%	17%
Theatre & Performances	31%	42%
Self-Guided Walks or Bike Rides	36%	50%
Visited an Attraction	36%	25%
Museums/Galleries	38%	35%
Heritage Experiences or Attractions	41%	27%
Events & Festivals	43%	27%
Retail	44%	54%

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