



VISIT KENT
BUSINESS
GARDEN of ENGLAND



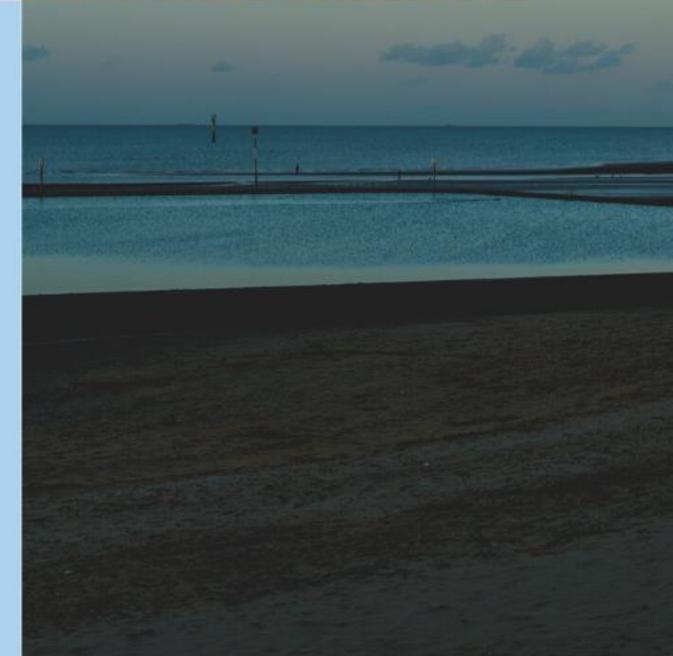
Interreg EXPERIENCE- Social Impact Monitoring: Kent Residents Survey

22 January 2021



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Introduction and Report Overview

This report looks to present findings from a recent survey, which aimed to gather valuable insights into the perceptions of Kent residents on the impacts of seasonal tourism, as well as the impact of the COVID-19 pandemic on local communities.

The survey 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 also to strengthen the resilience of the sector post-COVID. The principle of sustainable tourism is a topic that is embedded in the project's approach, as it seeks to ensure sustainable growth of seasonal tourism without compromising ecosystems and quality of life for local residents. The contribution that the project will bring to Kent is vital, including mitigating the impact of increased visitor footfall, and aims to bring economic, social and environmental benefits to communities and the wider destination. And the revenue generated will be used to 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. And by assessing various impacts over the peak and winter season, parallels and contrasts can be drawn, and findings can be aligned to support and inform wider project activity.

**Sustainable growth
of seasonal tourism
without
compromising eco-
systems and quality
of life for local
residents**



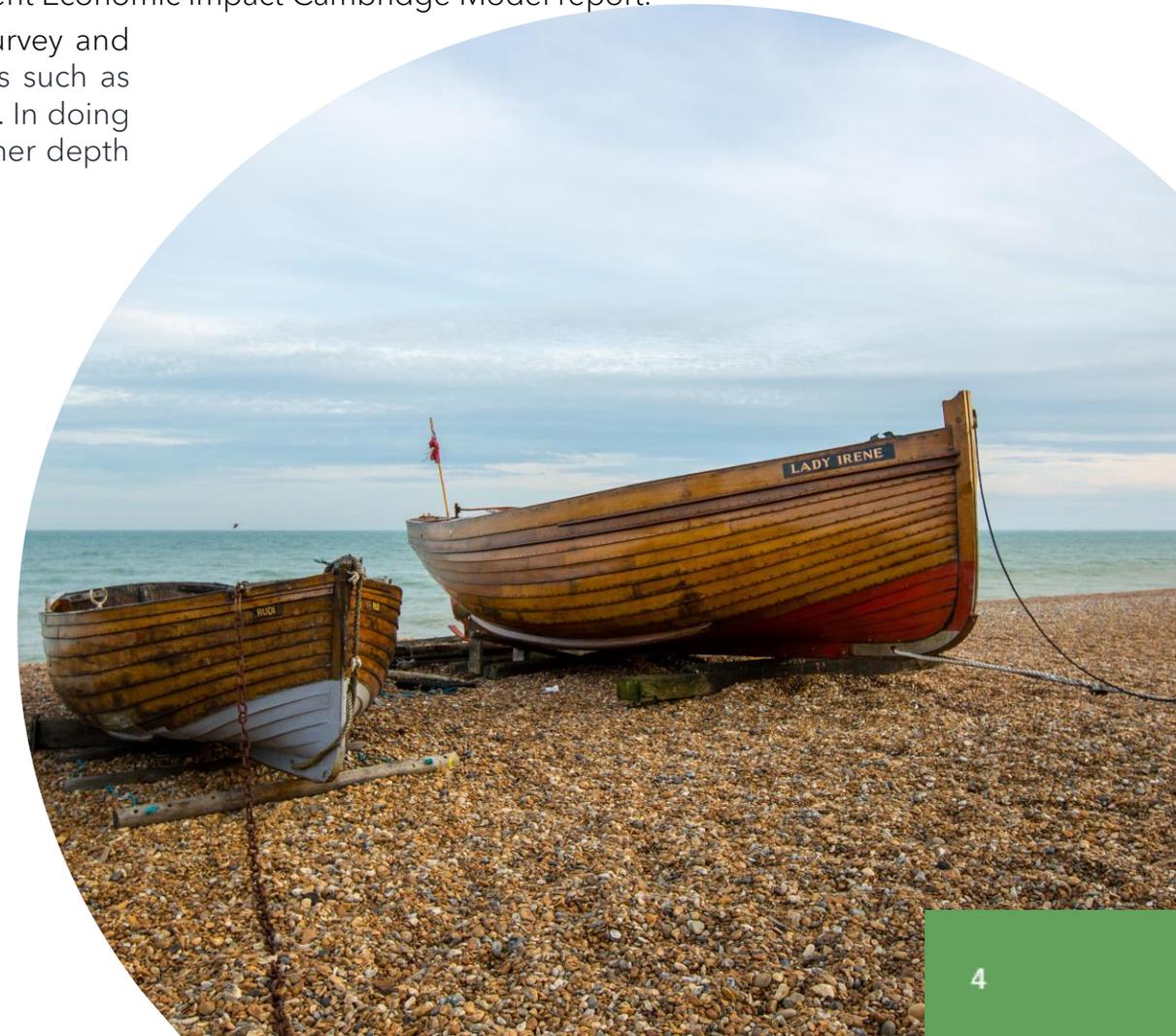
This report is based on findings emerging from the 1st wave of data collection, interrogating perceptions around the impacts of summer tourism. To create a picture of the current climate, the report will initially begin with a secondary insights section covering any relevant local or national research and trends. Alongside this, where possible throughout the report, any other relevant research findings will also be cross-referenced to enrich survey findings further, this includes any other reports completed as part of the wider EXPERIENCE project and the 2019 Kent Economic Impact Cambridge Model report.

The report will then look to present findings for all questions included in the survey and results will also be segmented by respondent demographics and other variables such as district and those situated within the Kent Downs AONB, where sample sizes allow. In doing so, any findings that differ from the overall results can be highlighted, to add further depth to findings and recommendations. The report will include the following sections.

- Perceived impacts and benefits of summer tourism in resident's local area
- Impact on wellbeing and emotional connection to local area
- The social, cultural and economic impacts post-COVID
- Impact on emotional connection post-COVID
- Top positive and negative impacts of tourism and overall resident support

Given the unprecedented impact of the COVID-19 pandemic, outlining the implications of this will be essential, and insights gained from this report will be key in understanding this impact, alongside the perceived benefits and risks associated with summer tourism on local communities. Lastly, a list of key takeaways and recommendations will be compiled to inform wider project aims and objectives, to help create a picture of residents' current perceptions and support of tourism.

Helping to create a picture of residents' current perceptions and support of tourism



Latest Research and Trends

This section looks to bring together any relevant research and trends on both a local and national level, to further enrich the interpretation and recommendations outlined in this report, and present some of the key themes that are integral to the aims and objectives of this piece of research and its wider project implications.

As a whole, tourism brings significant economic benefits to the visitor economy, supporting local jobs and attracting investment and demand to develop local infrastructure. According to the latest economic impact study commissioned by Visit Kent, in 2019 the county attracted 66.5 million visitors, with the tourism activity contributing £4.1 billion to the local economy. Figures also show that tourism supports 81,458 jobs, most notably within the food and drink and retail sectors. And when looking at growth from two years prior, total visitor spending has seen a 7.3% increase since 2017 and a 6% increase in jobs supported by this activity. These figures clearly demonstrate the value and positive economic impact tourism brings to the county and that visitor demand was undoubtedly present prior to the pandemic. However, seasonality figures from the report show that there is a significant peak in visitor volume during the summer months for both overnight and day trips,¹ supporting Visit Kent's aim to increase off-season visits.

Subsequently through product development, out of season tourism can be boosted to reduce the reliance placed on busier periods, and the resilience of the industry and local businesses post-COVID can be strengthened as part of recovery efforts and beyond. In addition to the economic benefits, according to an article published by One Planet, it is vital to ensure impacts are measured and that data can be used to help support and inform decision making, ensuring sustainability is at the core of activity and that ambitions align with and support the needs of host communities and landscapes. In general, the topic of sustainability is one that is receiving increasing attention and destinations and businesses will need to ensure they outline sustainable strategies and initiatives and begin to adopt more environmentally friendly practices.



The demand and income generated from tourism in local areas can certainly contribute positively towards the natural and built environment, including contributing towards the preservation of cultural and historical sites and conservation and maintenance of natural sites. ² However, there are also ways in which tourism can take its toll on the natural environment, mainly through overcrowding, pollution, and damage to natural and historic sites.

This adverse damage to local sites and the environment can result in attractions and destinations becoming tourism hotspots, whereby residents are unable to enjoy and access local sites themselves and have the quality of their local area diminished. Subsequently, it is important that visits to some areas are eased and that tourism activity looks to ensure sufficient visitor dispersal, mitigating the impact of increased visitor footfall.

The support of local communities in the case of tourism development and continuity is essential, as there is an increased risk that if benefits are not experienced directly, this can result in a negative and hostile viewpoint towards visitors. Consequently, this can then impact on visitors' experience, residents' quality of life and limit the area's potential in terms of appeal and growth. It is therefore vital that local communities are actively engaged and consulted on tourism developments where possible, and that the mechanisms and forums are in place for them to effectively voice any concerns. ⁴

It is this consultation that will enable communities to take an active role in shaping their local community, to work towards improving destinations for both residents and visitors. ⁴ Local residents and communities are often best placed to raise these issues and solutions, as they are the first to recognise any undesirable impacts. ³ According to an article published by City/Nation/Place on how people make places, organisations are coming together with communities on initiatives such as bringing empty buildings back into the community and increasing local pride and sense of ownership. ⁵



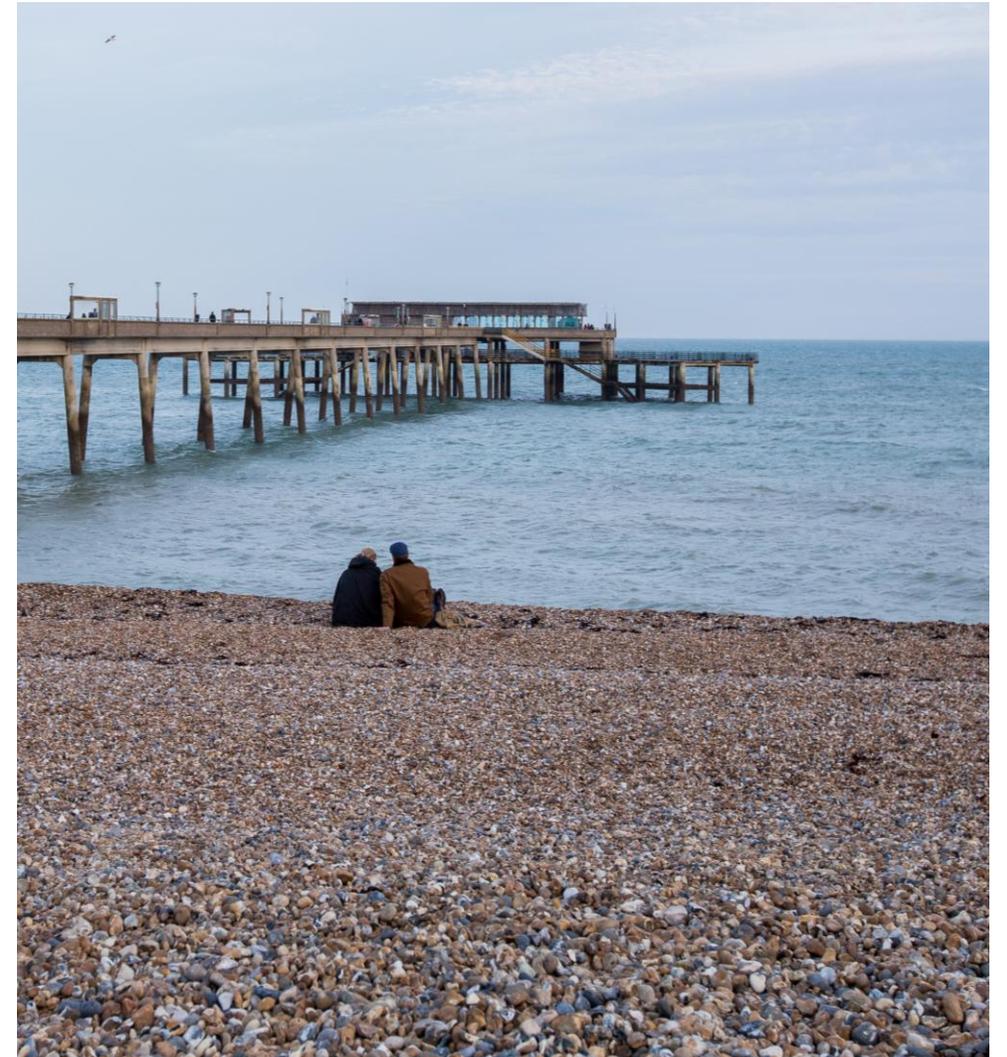
The support of **local communities** in the case of tourism development and continuity is essential

The demand for trips that offer a deeper connection to a place and authenticity is growing, with an increase in those seeking experiential activities, local produce and traditions. As local residents are experts in their area and have a wealth of knowledge, they can offer a unique aspect to the destination and assist with local tours and meet with visitors.³

For destinations to be able to deliver this effectively, local residents need to support these efforts and recognise the benefits it can bring to the local community, both economically, socially and environmentally. Although challenging at times, a balance is needed to ensure destinations work to provide authentic experiences for visitors, while ensuring meaningful livelihoods for locals.³ This includes the social and wellbeing benefits of tourism through sense of pride and utilisation of local facilities and infrastructure, that can contribute greatly to residents' quality of life.

According to the attractions recovery tracker published by ALVA in July 2020, visitors were most likely to visit more open spaces such as countryside and coastal areas once restrictions allow.⁶ As open spaces, rural and coastal destinations are perceived to be less crowded, these areas may have seen a change in visitor numbers, which could in turn impact on the quality of life and access to local facilities and attractions for local residents.

Overall, tourism is a major part of the local economy and research has shown it is vital that local communities are consulted and that impacts and perceptions are monitored in order to mitigate any adverse effects. As the recovery stage begins, tourism can be repurposed as a supporter for the community, promoting local businesses, sourcing local, creating stronger communities and enhancing satisfaction and support of tourism.²



Kent Residents Survey - Wave 1

KEY FINDINGS

This survey looked to present findings from a recent survey, which aimed to gather valuable insights into the perceptions of Kent residents on the impacts of seasonal tourism, as well as the impact of the COVID-19 pandemic on local communities.



88%

Of residents agreed with the statement 'I support summer tourism in my local area'

Perceived main attraction in local area

Coast/beaches



42%

Museums/historic sites



28%

Countryside



17%

1,258

Kent Residents



Online Survey



Top perceived benefits of summer tourism in local area



Increases availability of recreation facilities



Increases demand for historic & cultural attractions



Preserves historic buildings & monuments



Increases employment opportunities



Tourism improves the local economy



Local investment development & Infrastructure

Areas for improvement



Increase availability of parking



Increase availability of public transport services



Reduce impact to the natural environment

67% Agreed they like to meet visitors in their local area

16% Only a small proportion of residents felt there were too many visitors in their local area

Perceived change in visitor numbers during summer 2020

41%



Decrease



28%

Same/ Don't know



31%



Increase



82%

Of residents agreed they live in a beautiful area



65%

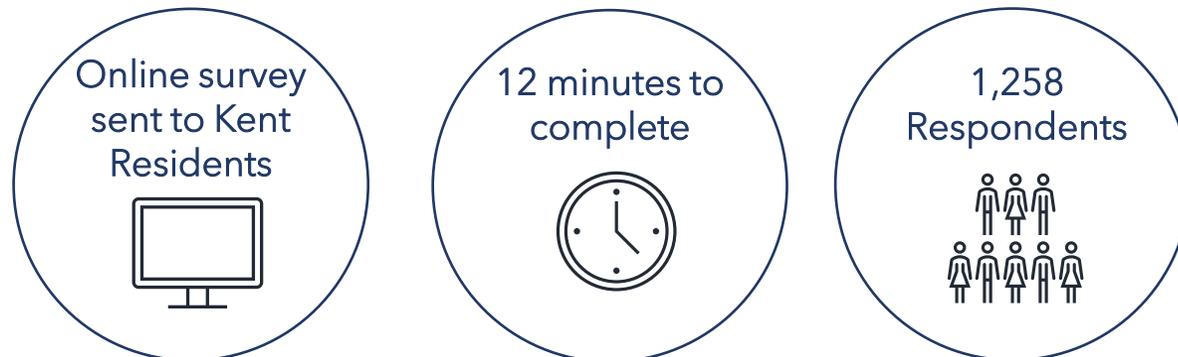
Of residents felt more strongly connected to their local area in light of COVID-19

Methodology

Data was collected through an online survey sent out to Kent residents via Visit Kent and partners' resident databases and shared via various social channels. The survey was also incentivised and gave respondents an opportunity to be entered into a prize draw.

The survey was targeted at those who live within the county and required respondents be 18 years or over to participate. Respondents' participation in the survey was also voluntary and they were able to discontinue the survey at any point and 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 incomplete responses up to an agreed point in the survey were removed for consistency and accuracy purposes, which resulted in a total sample size of 1,258 respondents. Please note, as not all questions in the survey were mandatory, sample sizes for certain questions may differ.



Sample & Demographics

Gender & Age

In order to analyse findings demographically and to create an overall picture of the sample, the survey asked respondents to answer various demographic questions, including age group and gender. Findings show that the majority of respondents were female (73%) and 27% male, with the remaining 1% stating they would prefer not to say.

In terms of age, 64% were aged 35-64 years old, followed by 27% aged 65 and over. The remaining 9% included those aged 18-34 and those that stated they would prefer not to say, as illustrated in Figure 1.

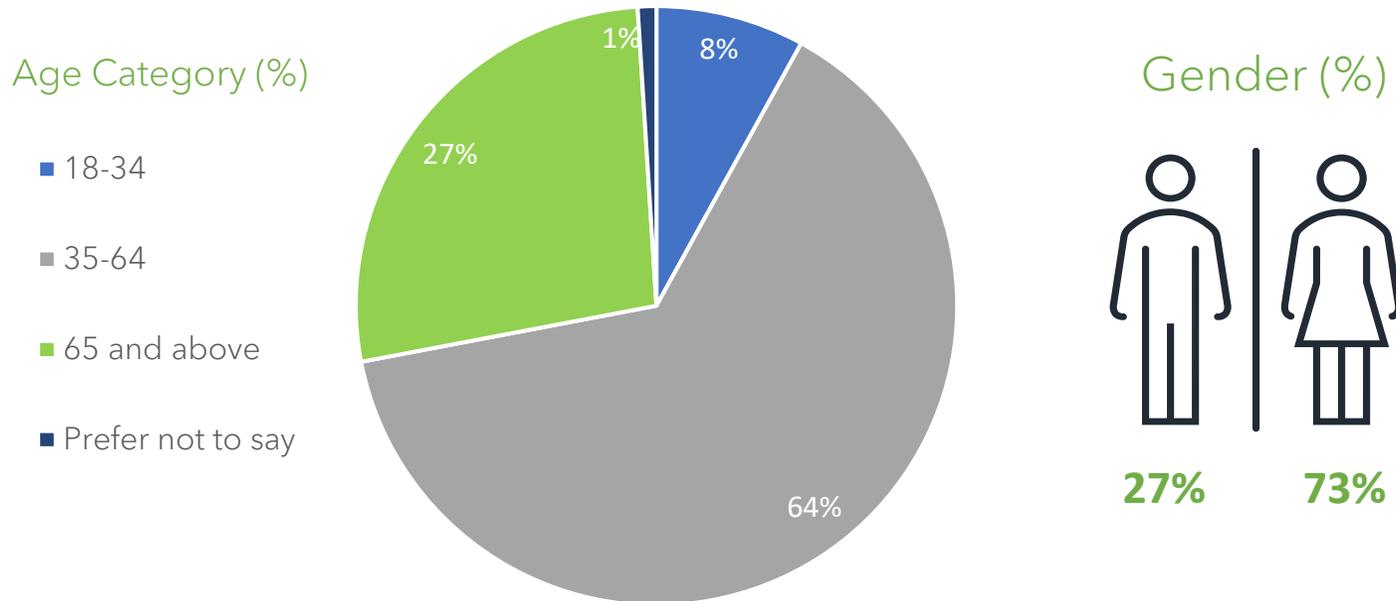


Figure 1: Graph showing the % of respondents that fell into each age category. BASE= 1258



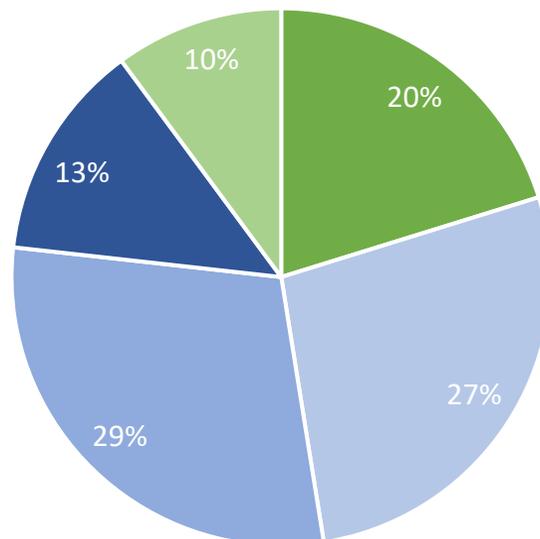
Work Status & Educational Level

Following this, respondents were asked to specify their work status alongside the highest level of education achieved. Results show that the largest proportion of residents were employed full-time (39%), followed by 36% who specified they were retired. And as illustrated in Figure 3, 18% stated they were employed part-time and 7% were unemployed. Findings also show that the largest proportion of respondents had achieved an undergraduate degree such as a BA or BSc (29%), closely followed by 27% having achieved A-level or NVQ 3-4 standard.

These percentages alongside those on the previous slide for gender and age, indicate that overall the sample is skewed slightly more towards the older demographic but inclusive of those 35 and above, alongside female residents. In addition to this, the sample strongly captures those that are employed full-time and those that are retired, two of which markets could have the most disposable income, and particularly with the retired market more free time.

Education level (%)

- O level, GCSE, NVQ I. 1-2
- A level, AS/A2 level, NVQ I. 3-4
- Undergraduate degree, BA, BSc
- Postgraduate degree, MA, MSc, PhD
- Prefer not to say



Work Status (%)

- % Employed full-time
- % Employed part-time
- % Retired
- % Unemployed

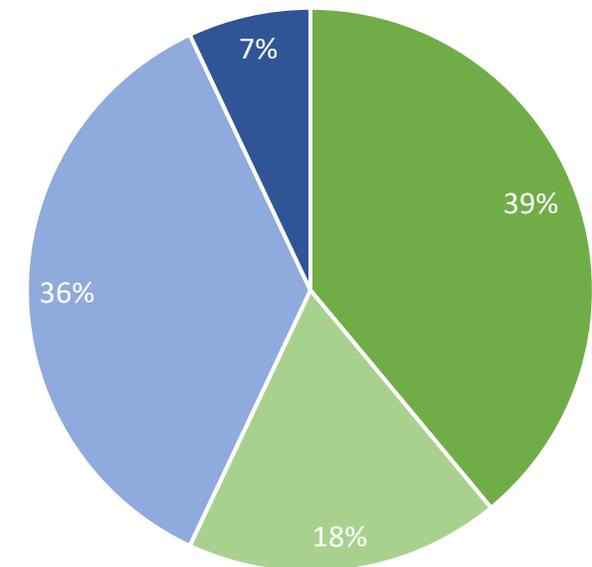


Figure 2: Graph showing the % of respondents and educational level BASE= 1256

Figure 3: Graph showing the % of respondents and their work status BASE= 1254

Location & District

The survey then asked respondents to specify which district they are located, alongside the type of area they reside in. As shown in Figure 4, the largest proportion of residents were either located in Thanet or Canterbury (both **15%**), followed by those from Ashford (**12%**). Followed by those located in Swale, Maidstone and Medway, all being selected by **8%** of respondents. The proportion of respondents located in each of these districts does also indicate that the overall sample is representative of each of Kent's regions as they cover districts in both East, West and North Kent.

In terms of type of area, the largest proportion of respondents were located within a town (**57%**), followed by **32%** residing in a village. Findings also show that only **6%** selected rural and **4%** city, with the latter most likely representing those located in the city of Canterbury. And as an additional segment, survey data was also analysed by those that live within the KDAONB, with results showing that **2%** did in fact reside in these areas.

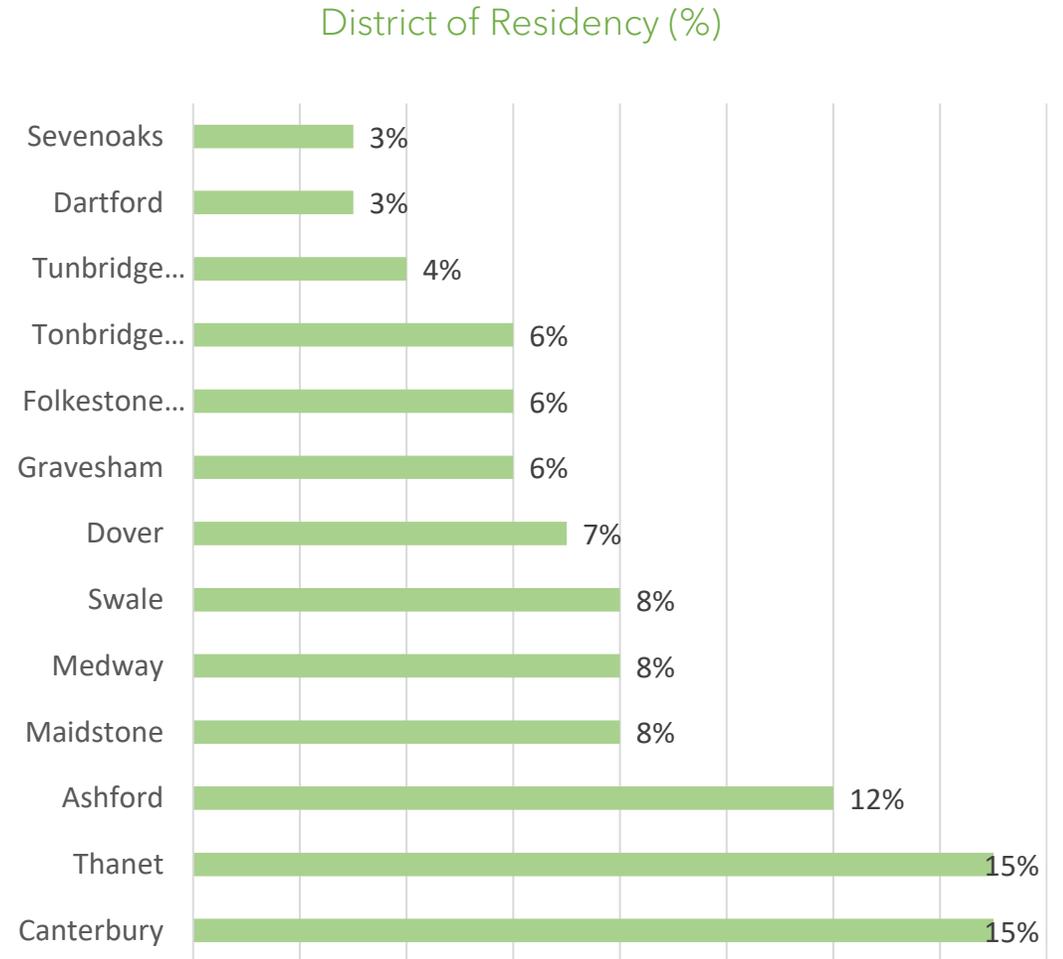
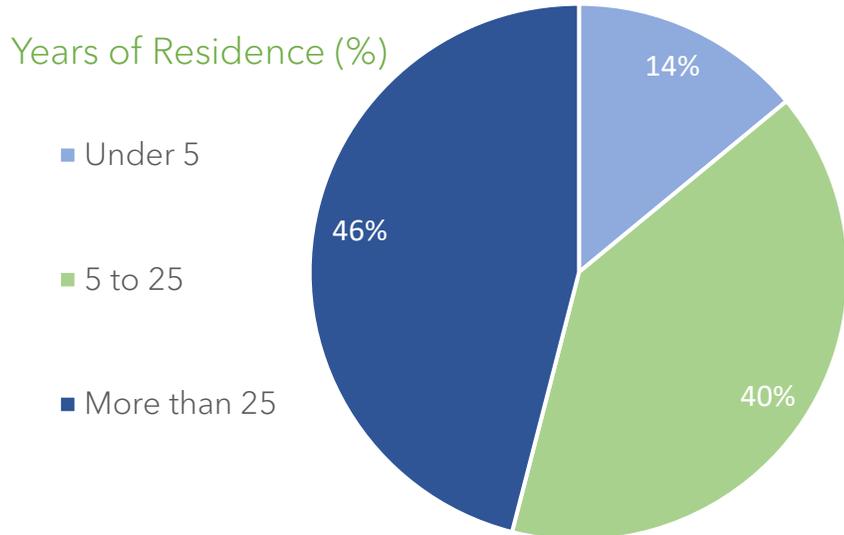


Figure 4: Graph showing the % of respondents and their home district BASE= 1257

Years of Residence & Tourism Industry Involvement

Respondents were also asked to specify their length of residency, ranging from those that had lived in their area for under 5 years, to those that had lived there for more than 25. As shown in Figure 5, the largest proportion (**46%**) of residents stated to have lived in their area for more than 25 years, followed by **40%** selecting between 5-25 years, with the remaining **14%** having been there for under 5 years. Firstly, findings show that overall, the sample is very much established in terms of length of residency, which may result in having a more extensive knowledge and experience of local changes and impacts over time. And when cross-referencing results for both age and length of residency, the older the respondents were the longer they had lived in their local area, with **60%** of those aged 65 and over, having lived in their area for over 25 years, compared to **42%** for those aged 35-64 and **33%** of those aged 18-34. Lastly, the survey also asked if anyone within their household works in the tourism industry, as this may give them a more focused and informed view of the impact benefits the tourism industry can bring. However, results show that only **7%** of residents had somebody in their household working within the industry, illustrating that overall responses are from those that do not have direct experience with the industry themselves.



Does anyone in your household work in the tourism industry?

Yes
7%



No
93%



Figure 5: Graph showing the % of respondents and their length of residence BASE= 1257

Main Attraction

Respondents were also asked to select from a predefined list what they perceive the main attraction in their local area to be. As shown in Figure 6, the largest proportion selected coast/beaches (42%), followed by 28% selecting museums/historic sites and buildings and 17% selecting countryside. Alongside this, 3% of respondents selected 'other', which included responses such as pubs and cafes, events, walking, ferry and railway links, rivers and lakes and animal attractions. In addition to these, some respondents also mentioned more specific attractions such as Folkestone's Creative Quarter and Charles Dickens themed sites. To highlight any differences between different demographic groups, results were analysed against factors such as age and years of residency. In doing this, results show that for residents aged 18-34 years, a larger proportion selected shopping as their main attraction compared to overall results and other age groups (16% vs. 8% overall). This could perhaps indicate that younger residents live in areas with more retail opportunities or perhaps they seek this offering out more and therefore perceive this to be a major part of the destination. Alongside age, results show that residents who had lived in their local area for under five years were more likely to select coast/beaches (51% compared to 42% overall) and although it is difficult to pinpoint the exact reason why this may be, it could be reflective of their decision to relocate to an area due to its coastal offering and the appeal this has.

Tourist Destination

Residents were also asked if they consider their local area to be a tourist destination, with results showing that the majority of respondents did think so with 67% selecting 'yes' and 34% selecting 'no'. Of those respondents that did perceive their local area to be a tourist destination, a higher percentage selected coast/beaches as their main attraction (51%) compared to 42% for all respondents. On the other hand, of those that did not view their area as a tourist destination, 27% selected the countryside as their main attraction, 10% higher than overall results. These findings show that Kent-wide the coastal and heritage offering is recognised strongly by local residents in terms of identity and that those situated in coastal areas were more likely to perceive themselves as a tourist destination compared to those in more rural areas. This could potentially indicate that coastal areas are more overcrowded and therefore perceived to be more of a tourist hotspot, and that rural destinations are not receiving as many tourists.

Perceived main attraction

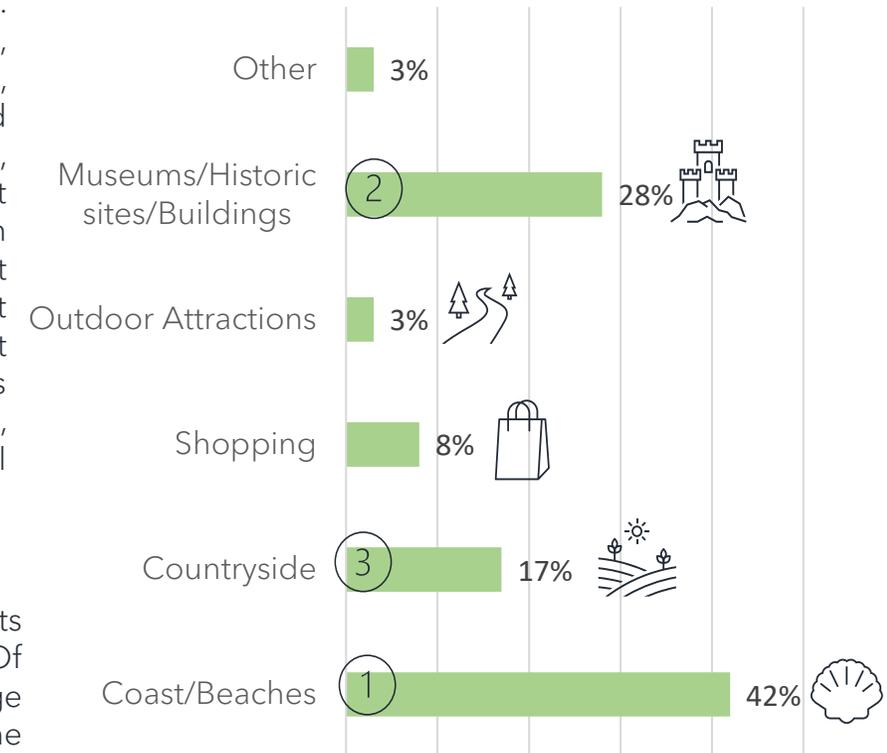


Figure 6: Graph showing the % of respondents and their perceived main attraction BASE=724



KENT RESIDENTS SURVEY FINDINGS:

IMPACT AND BENEFITS OF TOURISM

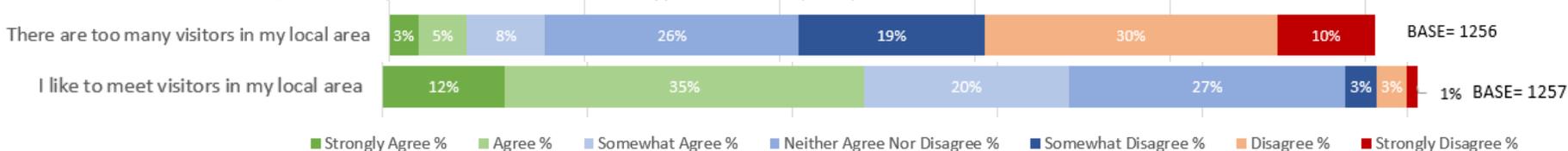


Impact of Summer Tourism

The survey was broken down into various sections, the first of which looked at the perceived impact and benefits of summer tourism locally. This began with residents being presented with a list of statements about the impact of summer tourism on where they live, and they were asked to indicate how much they agreed or disagreed by selecting one option for each statement. Prior to this respondents were also informed that 'local area' is defined as the city/town/village that they live in, rather than their home/place of residence. Alongside this, the survey also defined any references to 'tourism' as people on day trips as well as those coming from further away for a few days or more. All statements presented to respondents also specified that questions were based on a typical summer prior to the COVID-19 pandemic. This section looks to highlight the key findings and insights from these questions, and when analysing overall sentiment among residents, options for some questions have been combined, for example those that 'strongly agree', 'agree' and 'somewhat agree'. However, the full list of questions and percentages for each level of agreement and disagreement can be found in figure 7 on page 18.

Visitors in Local Area

Respondents were asked to rate their agreement with the statement 'there are too many visitors in my local area'. Findings show that when combining the percentages for those that 'strongly agree', 'agree' and 'somewhat agree', only **16%** of respondents felt there were too many visitors in their local area, with the largest proportion selecting 'disagree' (**30%**). This finding indicates that residents do not strongly feel that visitors are resulting in overcrowding or that their presence is negatively perceived in terms of quantity. Respondents were then asked if they like to meet visitors in their local area, with **67%** stating they agreed to some degree, with only **7%** displaying some level of disagreement. Overall, this response demonstrates that residents do in fact like to interact with visitors locally and this consequently strongly supports and enhances trends around the demand for authentic, local experiences and meeting with local people and owners.



Availability of Local Facilities

The survey then asked residents to rate their agreement with the statement ‘tourism increases the availability of local recreation facilities and opportunities’, with findings showing that **86%** agreed with this to some degree. This highlights the benefit tourism can bring to the local area in terms of facility creation, perhaps driven by demand from tourism and that this is clearly recognised by local communities. Respondents were then asked if tourism limits parking spaces available to local people, however unlike the previous two statements responses indicate that this is an area of concern among communities, with **71%** displaying some level of agreement with this statement. Furthermore, this presents an area for improvement in terms of resident perceptions and an opportunity to raise resident satisfaction and increase the availability of parking for local residents.

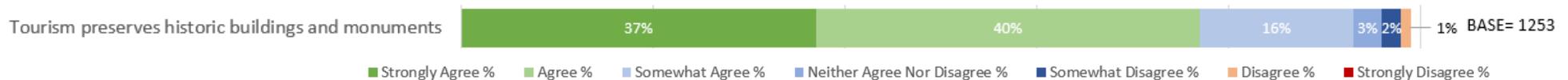


Impact to Historical Sites & Natural Places

Looking towards preservation and impact to the natural environment, respondents were asked to rate their agreement with the statement ‘tourism is harmful to natural places like the countryside or coastal areas’. Findings show that the largest proportion of respondents displayed some level of agreement with this statement, with **53%** selecting either ‘strongly agree’, ‘agree’ or ‘somewhat agree’. However, the percentage of those that selected ‘strongly agree’ only accounted for **4%**. But overall, this highlights an area of unease among residents, perhaps fuelled more so by the increasing attention and pressure on organisations and authorities to align efforts with conservation and sustainability and expectations that residents now have.



In terms of preservation, the survey asked respondents to rate their agreement with the statement ‘tourism preserves historic buildings and monuments’. With findings showing that a significant percentage (**93%**) of respondents displayed some level of agreement with this statement, demonstrating that this is a key perceived benefit tourism brings to local areas that is sufficiently acknowledged by residents. And linking with this directly, residents were also asked to rate their agreement with the statement ‘tourism increases the demand for local historical and cultural attractions’. Results for this show that a significant proportion (**95%**) of respondents agreed with this statement to some level. Together, agreement for these statements show that residents are recognising tourism’s role in driving the demand for these sites, which in turn allows income generated to be reinvested into their preservation and maintenance, which can ultimately benefit the local community and the area’s assets.



KENT RESIDENTS SURVEY

Perceived impacts and benefits of summer tourism in local area prior to COVID-19

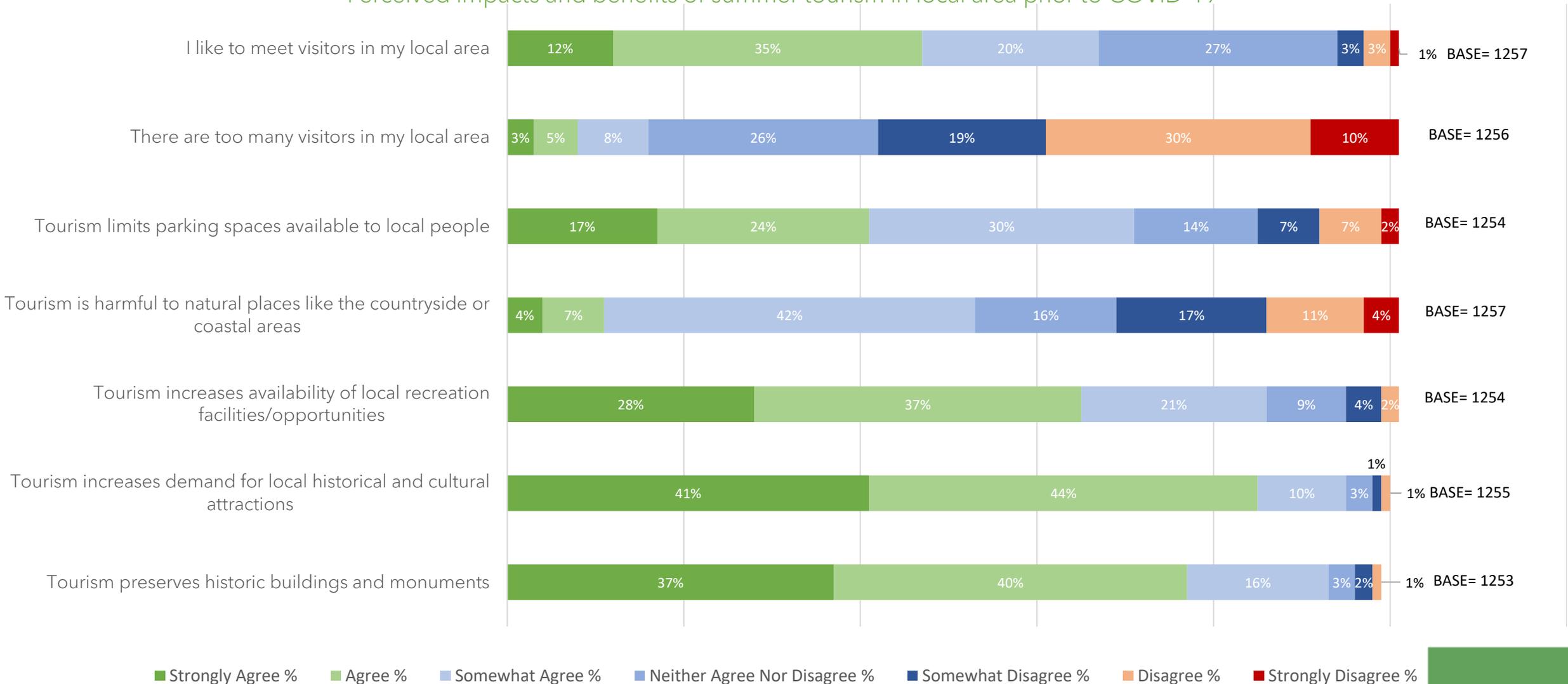
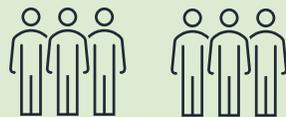


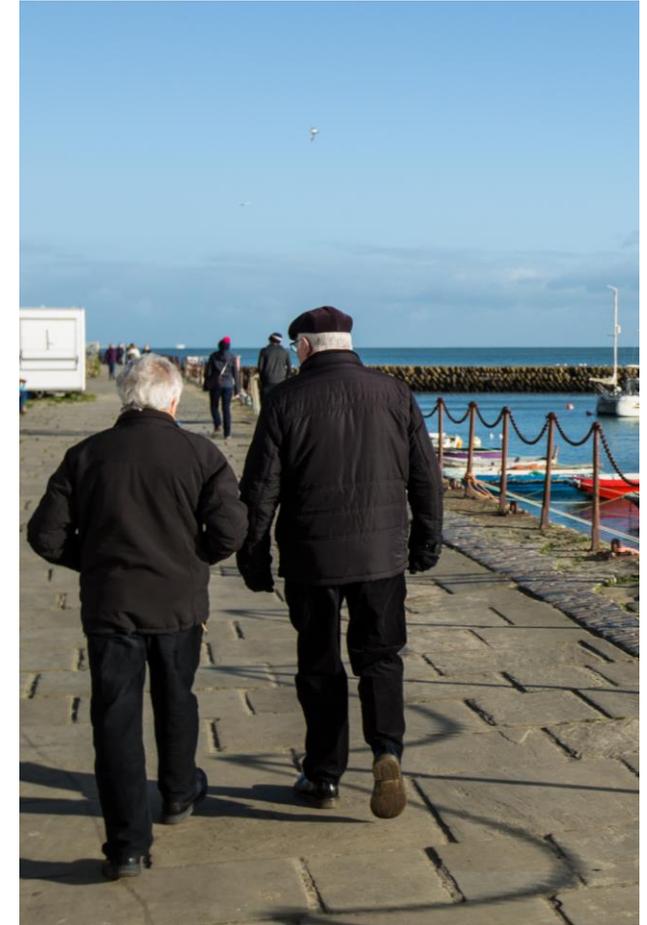
Figure 7: Graph showing the % of respondents and level of agreement with statements on the impact of summer tourism in local area

Impact of Summer Tourism- By Respondent Type

Age Category



- Looking at responses by age category, agreement with the statement 'tourism helps to preserve historic buildings and monuments' increased with age, with the majority of those aged 35-64 and those age 65 and over, selecting some level of agreement (both **94%**) compared to **88%** for those aged 18-34 years.
- In terms of tourism's impact to natural places such as the countryside and coastal areas, agreement that tourism can be harmful was highest for those under 65 years, with those aged 18-34 and 35-64 feeling more strongly about this with a **53%** and **55%** agreement retrospectively. This perhaps indicates the growing concern particularly among younger generations about climate change and damage to the environment.
- Findings also show that the youngest age bracket (18-34), felt more strongly compared to other age groups that tourism can reduce the availability of parking to residents, with **82%** agreeing to some level compared to **71%** of all respondents.
- Responses for each age group were also cross-referenced with the statement 'I like to meet visitors in my local area'. Findings show that there is an increase in agreement with age, with **74%** of residents aged 65 and over selecting some level of agreement compared to **67%** overall and only **53%** among those aged 18-34 years.



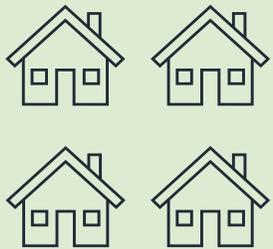
KENT RESIDENTS SURVEY

Location

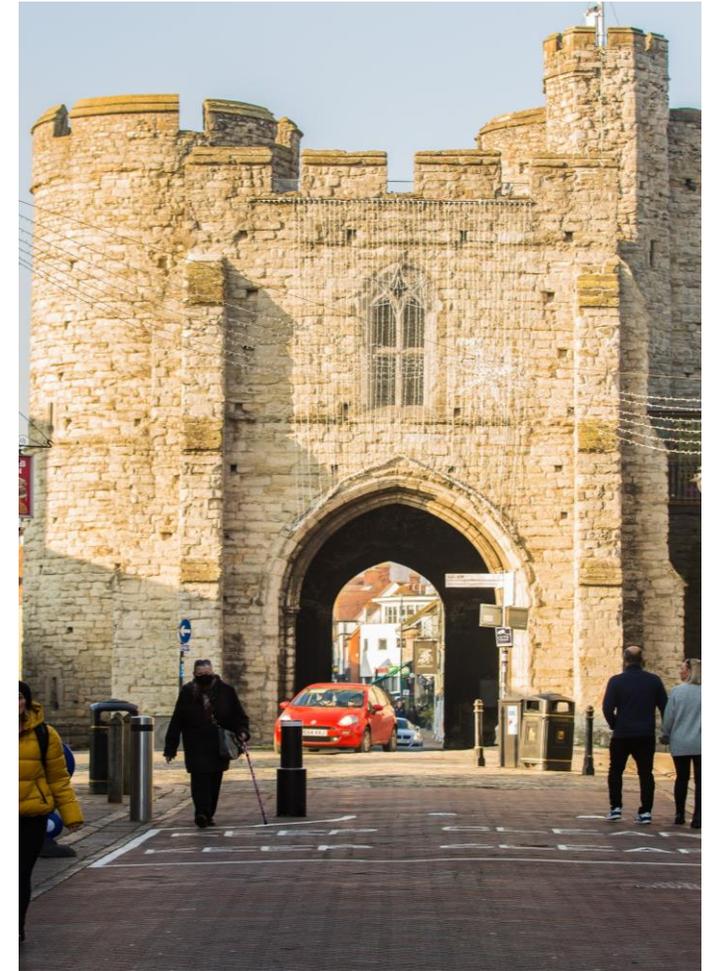


- Residents' agreement that tourism limits parking spaces available to local people was higher for residents located within a town or village, with **72%** displaying some level of agreement for both areas compared to **67%** for those living in a rural areas and **54%** among those residing in a city. These findings indicate that more focus and activity may be needed to increase the availability of parking to residents in these types of locations.
- In terms of residents' desire to meet with local visitors, those situated within a city (**75%**) agreed with this statement more so compared to respondents in other locations.

Years of Residency



- Agreement that tourism protects and enhances the natural environment was lower among residents who had lived in their local area the longest. With **53%** of residents who have lived in their area for over 25 years, expressing some level of agreement with this, compared to **60%** of residents who have been in their area for under five years. This finding indicates that the longer residents have lived in their local area the less likely they are to recognise these benefits, which could be a result of witnessing the adverse impacts of tourism to the environment over a longer period of time in that particular area.



Main Attraction



- Looking at agreement that tourism is harmful to natural places like the countryside or coastal areas, agreement was highest among those who perceived their area's main attraction to be the coast/beaches (57% compared to 53% overall and 49% for the countryside), indicating that there is a need to increase activity, to reduce harm to coastal areas in particular.



- Reinforcing this, when looking at agreement with the statement 'there are too many visitors in my local area' overall agreement was highest in areas with a strong coastal offering, with 24% agreeing there are too many visitors compared to 16% overall and only 9% for those with a countryside offering.



- When looking at results for these two questions, findings highlight the sentiment among residents that coastal areas are being adversely impacted by tourism in terms of overcrowding and perhaps pollution compared to countryside areas.

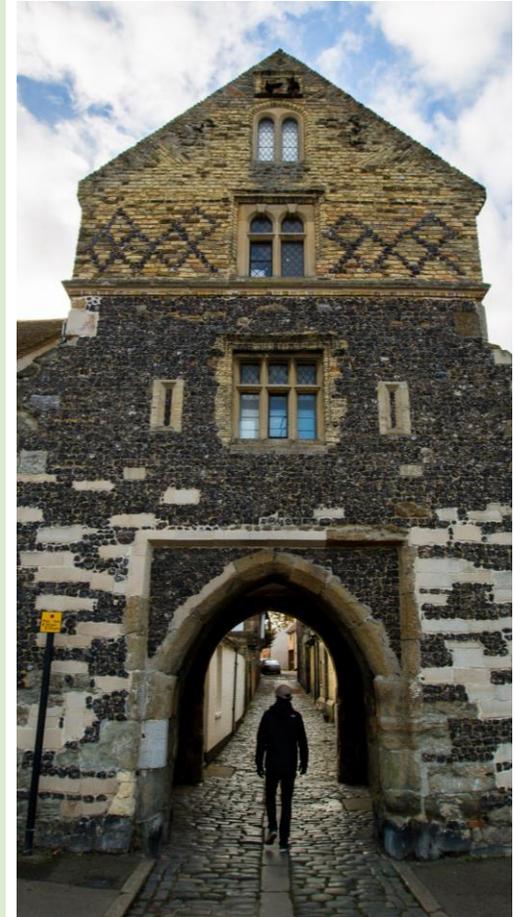
The Kent Downs AONB



- Similar to the Kent wide results, those living within The Kent Downs AONB overall did not feel there were too many visitors in their local area, however a larger percentage selected 'neither agree nor disagree' (42% vs. 26%), and therefore less respondents selected some level of agreement.
- 88% of those situated in The Kent Downs AONB selected some level of agreement that they like to meet visitors in their local area, compared to 67% for all respondents. This shows that those situated in the AONB like to meet visitors more so than overall respondents.
- Residents in this area also agreed more strongly that tourism can be harmful to the natural environment (71% vs. 53%), most probably reflective of their rural location and perhaps feeling a stronger connection to and interest in these areas being protected and adverse impacts minimised.

District

- When analysing findings for these statements alongside district, those based in Canterbury agreed more so that there were too many visitors in their area (**35%**) compared to **16%** for all respondents. And when looking at districts that disagreed with this statement, only **4%** of residents based in Gravesham and Medway agreed to some level. A similar picture was also observed for those based in Maidstone, Tonbridge and Malling (both **5%**) and Tunbridge Wells (**6%**). This perhaps indicates an opportunity to raise awareness of additional products in these areas to manage visitor dispersal in more crowded areas.
- Residents based in Canterbury and Thanet agreed more so that tourism limits the availability of parking for local residents, with **81%** of respondents in both areas displaying some level of agreement, compared to **71%** of overall respondents.
- Agreement that tourism helps to preserve historic buildings and monuments was highest for those living in Dover and Medway (both **99%** compared to **93%** among all respondents). This finding firstly shows the appreciation of tourism's contribution towards this and it is also perhaps reflective of both areas' strong heritage offering. This includes, sites such as Dover, Deal and Walmer Castles and in Medway, several English Heritage properties, Rochester Cathedral and The Historic Dockyard Chatham.
- Looking at the impact of tourism to the natural environment, agreement that tourism activity causes harm was highest amongst residents based in Canterbury (**61%**), Thanet and Tunbridge Wells (both **59%**). This sentiment among residents could perhaps indicate, particularly in Thanet and Canterbury, the damage and pollution to coastal areas and beaches, and also highlights the need to assess the impact to the environment in these areas in particular.
- Residents of Dover and Thanet displayed a higher level of agreement with the statement 'I like to meet visitors in my local area', with **72%** of residents in both areas selecting some level of agreement compared, to **67%** among all respondents. This perhaps indicates that residents in these districts are more engaged with local visitors and are more open to involvement in local authentic experiences, in addition to local guide services.

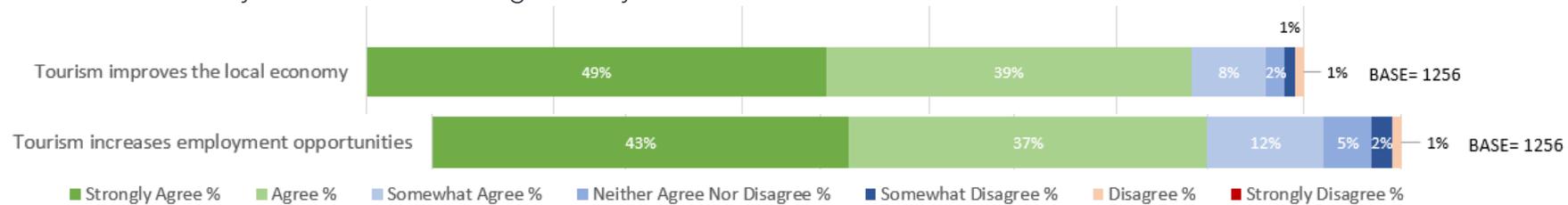


Perceived Benefits of Summer Tourism

The survey then presented respondents with a series of additional statements regarding their perceptions of the benefits of summer tourism in their local area, and again asked respondents to base their views on a typical summer pre-COVID-19. When analysing overall sentiment options for some questions answers have been combined, for example those that 'strongly agree', 'agree' and 'somewhat agree'. However, the full list of questions and percentages for each level of agreement and disagreement can be found in Figure 8 on page 25.

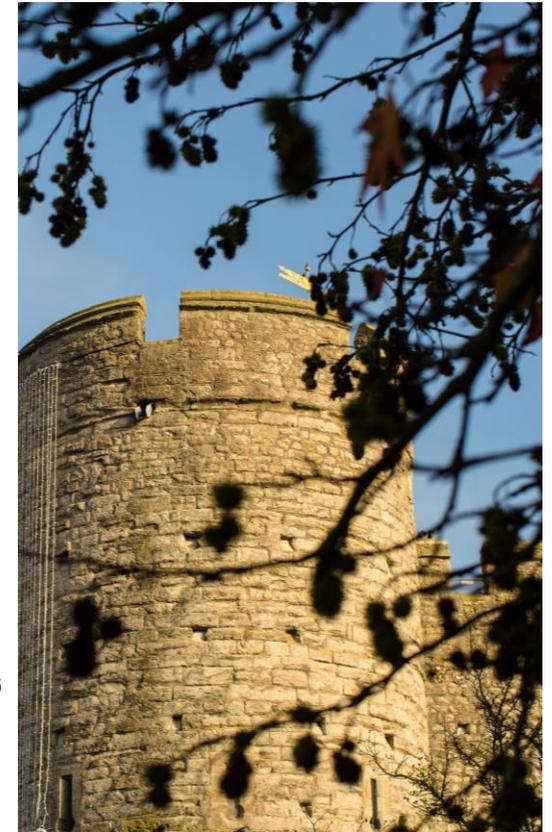
Local Economy & Employment

When looking at sentiment among residents, and agreement that tourism improves the local economy and increases employment opportunities, the largest proportion of respondents for both statements felt that they 'strongly agreed' (49% and 43% retrospectively), followed by those that 'agreed' (39% and 37%). This demonstrates the value of tourism to the local economy and that this is recognised by local communities.



Local Services & Prices

The survey then asked respondents whether tourism reduces their ability to access local services and facilities, however findings show that overall the majority of respondents displayed some level of disagreement with this statement, with only 23% agreeing to some level. Respondents were then asked to specify their agreement with the statement 'tourism increases prices for local services and amenities'. Findings show that overall, the largest proportion of residents displayed some level of agreement with this statement (45%), followed by 30% selecting 'neither agree nor disagree' and 26% expressing some level of disagreement. And when looking at the findings for both of these statements collectively, results show that while residents feel they are still able to access local facilities and services they do perceive tourism to determine an increase in prices locally.

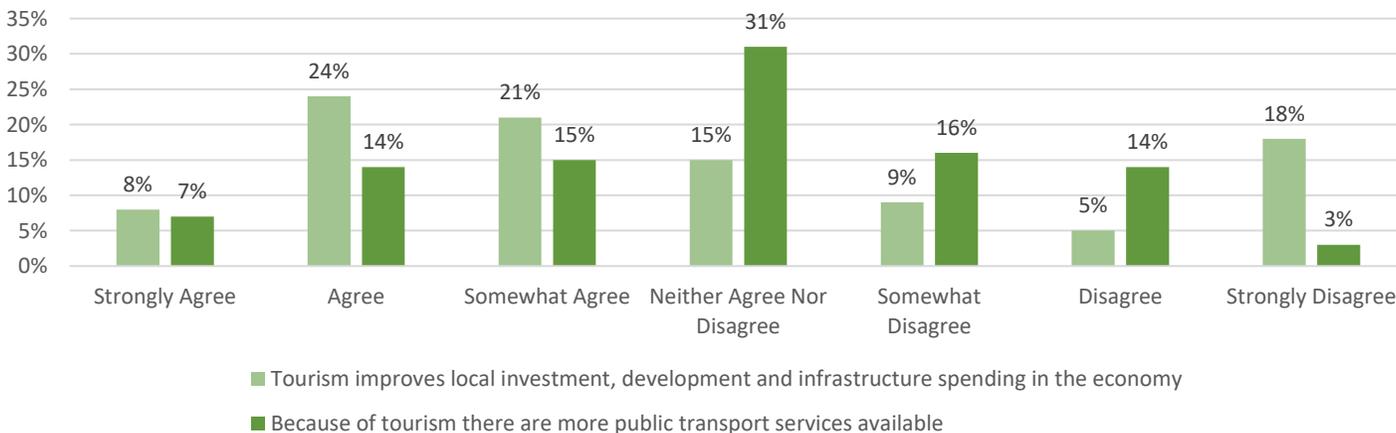


Local Investment & Infrastructure

Looking at whether tourism triggers local investment, development and infrastructure spending in the economy, the majority of respondents (53%) agreed to some level that tourism improves these aspects for the local area. Although, findings also show that 32% of respondents disagreed with this statement to some degree, with the remaining 15% selecting 'neither agree nor disagree'. But all in all, there is certainly a high degree of recognition of tourism's contribution to these areas, although perhaps in certain parts of the county this sentiment is not as high.

When asked to rate their agreement with the statement 'because of tourism there are more public transport services available', responses were fairly evenly split in terms of sentiment. With 36% expressing some level of agreement, followed by 33% specifying they disagreed to some extent, and the remaining 31% selecting 'neither agree nor disagree'. Although overall the largest proportion felt positively towards this statement, sentiment on this was not as strong as other statements.

This finding could be representative of particular destinations in the county not being as well connected as some more urban areas, again reinforcing recommendations from the EXPERIENCE Business Needs Report that transport and connectivity should be a priority for less connected areas.



Perceived impacts and benefits of summer tourism in local area prior to COVID-19

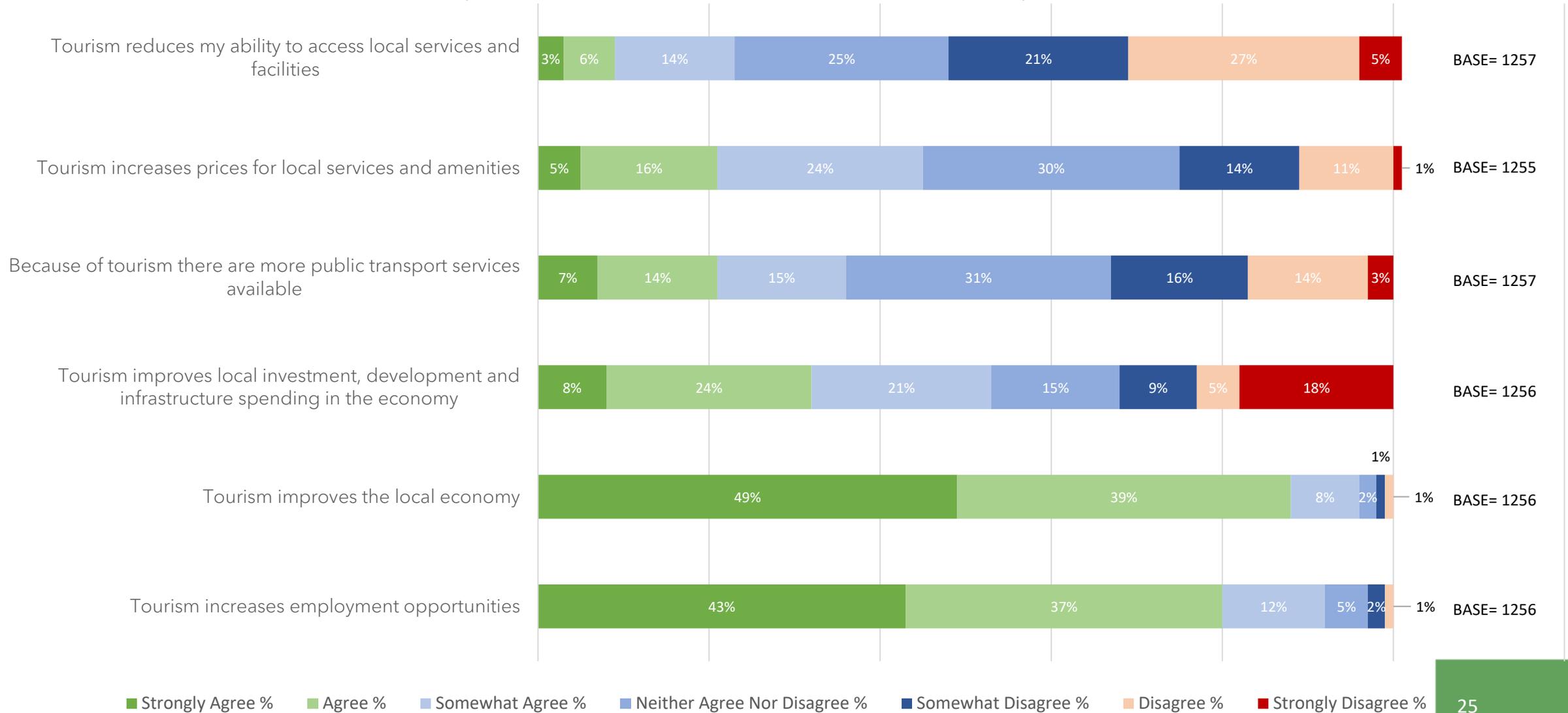


Figure 8: Graph showing the % of respondents and level of agreement with statements on the impact of summer tourism in local area

Perceived Benefits of Summer Tourism- By Respondent Type

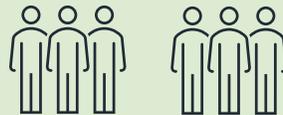
Age Category



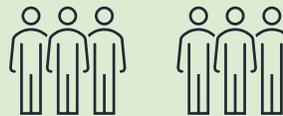
- Looking at sentiment towards tourism's role in increasing employment opportunities, the level of agreement increased among older age groups, with those aged 18-34 feeling less strongly towards this statement, with **81%** expressing some level of agreement, compared to **95%** for those aged 65 years and over. This insight could be a reflection of the job market and unemployment rates among the younger demographic, with many tourism jobs perhaps being perceived as seasonal or part-time among this age category.



- The younger age group (18-34 years) did however, display a higher level of agreement that because of summer tourism there are more public transport services available in their local area. This included **47%** of this demographic expressing some level of agreement with this statement, compared to **36%** among all respondents. This may reflect a higher use of these services among this age group.



- When it came to tourism's role in increasing prices for local services and amenities, agreement with this was highest among those residents aged 18-34 (**52%**), compared to **46%** for those aged 35-64 and **38%** among those aged over 65 years. This sentiment, could perhaps be a reflection of this market potentially having a lower disposable income and may be trying to get on the housing market. They are also more likely to be at the start of their careers financially, so the impact of any price increases would be felt more greatly.



Years of Residency



- Looking at residents' feelings towards impact on price increases, those who have lived in their area for less than 5 years agreed with this more so, compared to those that had lived in their local area for longer. This could be attributable to this group being more likely to have recently purchased a house or living in rented accommodation and therefore, may be more financially impacted by increases in living costs, compared to residents that have lived there for a longer period, and are more well established.

Location



- When analysing findings by location, agreement that tourism improves local investment, development and infrastructure was highest among residents in cities (63% compared to 53% for all other types of location). This finding is likely a consequence of cities receiving a higher visitor footfall compared to other areas and therefore attracting more investment and a need to develop infrastructure to meet demand.



- Alongside this, those living in a city felt most strongly that tourism increases the availability of public transport services, with 52% expressing some level of agreement. And again, this is reflective of the need for services in these areas to accommodate visitors and commuters. Findings also show that overall agreement was lowest for those residents in villages (30%), reinforcing the issue of connectivity to more rural areas in the county.



Main Attraction

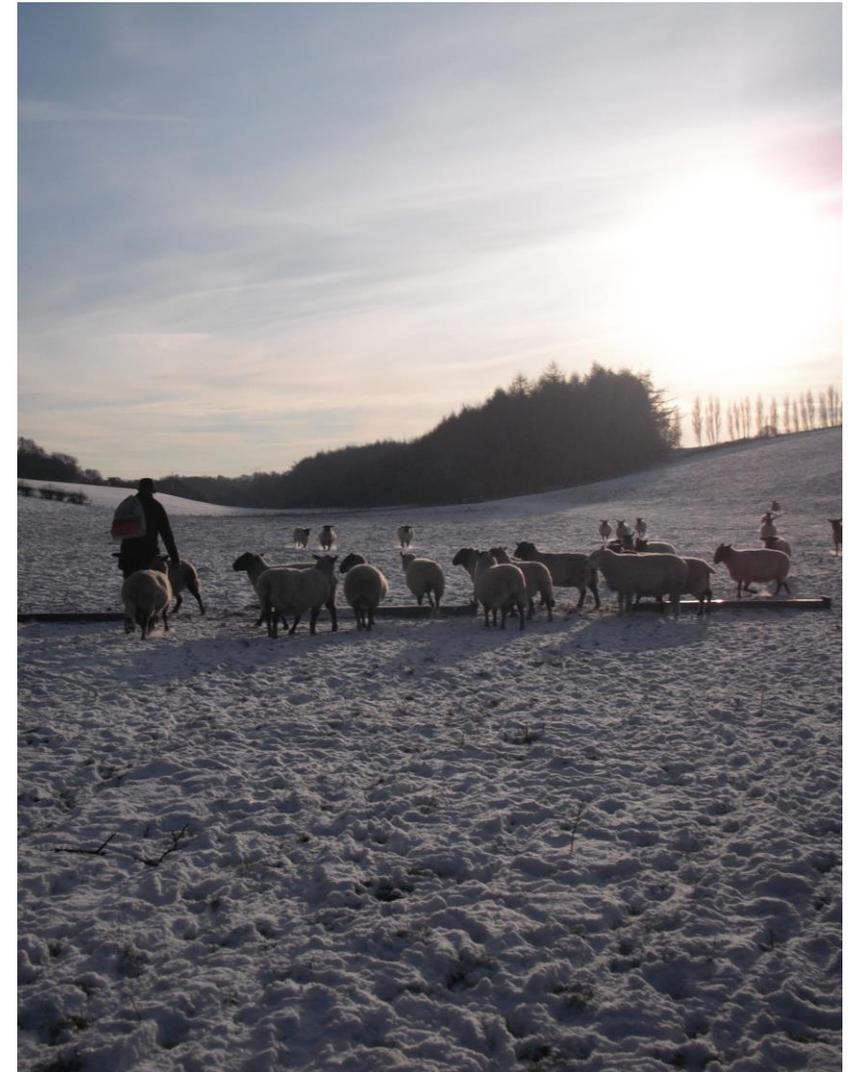


- Looking at the impact of summer tourism on decreasing ability to access local services and facilities, residents that perceived their local area to have a strong coastal/beach offering agreed more so compared to overall results. **33%** selected some level of agreement, compared to **23%** for all respondents, and only **19%** for those who selected the countryside as their main attraction.

The Kent Downs AONB



- A slightly smaller percentage of those living in The KDAONB (**47%**) agreed to some level that tourism improves local investment development and infrastructure spending in the economy, compared to **53%** for all Kent respondents. This could be reflective of more investment and infrastructure development in more urban and city areas compared to the countryside.



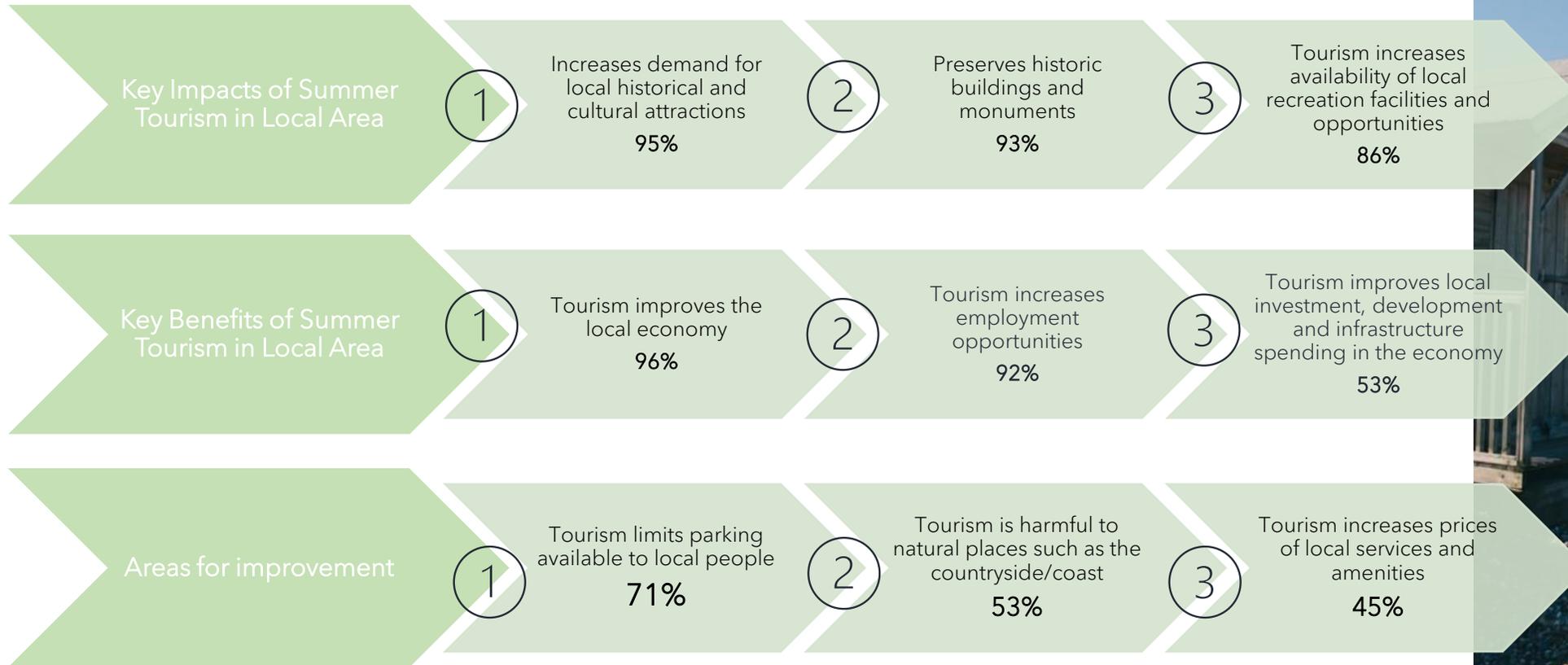
District

- Agreement that tourism increases employment opportunities, was highest for residents living in Canterbury and Medway (both **97%** overall agreement, compared to **92%** among all respondents).
- When looking at tourism's impact on the availability of public transport services available, those residing in Medway displayed the highest level of agreement (**42%**) among each of the districts. On the other hand, this agreement was lowest for those in Sevenoaks and Tunbridge Wells, with **26%** expressing some level of agreement in both destinations. These findings may be reflective of HS1 and connectivity to London from Medway, however, again illustrate perhaps the lack of public transport services in particular districts in West Kent.
- In terms of local investment and development in infrastructure, residents that expressed some level of agreement was highest for those living in either Canterbury or Ashford district. This included **67%** of residents in Ashford and **59%** of agreement in Canterbury, compared to **53%** for all respondents. These insights may be a result of various developments in Ashford, including the recent expansion at the Designer Outlet and the opening of the Curious Brewery.
- The percentage of residents that agreed tourism increases prices for local services and amenities was highest for residents in Canterbury (**58%**) and Thanet (**50%**), compared to **45%** for all respondents. However, this agreement was lowest for residents in Gravesham (**33%**), Tunbridge Wells (**34%**) and Sevenoaks (**36%**).
- Residents in Canterbury (**35%**) and Thanet (**36%**) also expressed the highest level of agreement that tourism reduces resident's ability to access local services and facilities. Insights for these two particular districts indicate that residents are being negatively impacted to some degree, whereby having a larger number of visitors may diminish the quality of life, to an extent.



Key Benefits & Impacts of Summer Tourism

Looking at key benefits and impacts of summer tourism, the below diagram illustrates the top three statements that respondents agreed with the most. With this showing that in terms of impact to the local area, residents feel strongly that tourism increases the availability of local facilities and particularly through demand increases the need for historical and cultural attractions that also benefit the local community alongside facilitating their preservation. And as mentioned previously, local residents that completed the survey showed a strong sense of recognition of the value of tourism to the local economy, job opportunities and the investment and infrastructure it can attract. Once again, these findings show a sense of support and understanding that tourism is a major contributor to several areas.





KENT RESIDENTS SURVEY FINDINGS:

IMPACT ON WELLBEING & EMOTIONAL CONNECTION



02

Impact of Summer Tourism on Wellbeing

This next section of the report presents findings from the survey on residents' perceptions of the impacts of summer tourism on wellbeing prior to the COVID-19 pandemic, to identify any connections between tourism and impact on wellbeing of local communities. Again, respondents were presented with a series of statements and asked to rate their level of agreement based on a typical summer in their area.

Resident Satisfaction

The following percentages combine all statements of agreement, including 'strongly agree', 'agree' and 'somewhat agree'. However, the full list of questions and percentages for each level of agreement and disagreement can be found in Figure 9 on page 33. As seen below, the vast majority of residents (93%) who completed the survey agreed they were satisfied with their life and that they were happy with their lifestyle. Alongside this, 72% of residents agreed they feel calm and relaxed and 70% agreeing with the statement 'overall, I feel very excited about my future'.

-  I am very satisfied with my life 93%
-  I am happy with my lifestyle 93%
-  I feel calm and relaxed 72%
-  I feel very excited about my future 70%



All in all, resident satisfaction in the county is high, particularly in terms of lifestyle, feeling calm and expressing optimism for the future. Although excitement for the future saw the largest proportion of residents selecting 'neither agree or disagree' (20%), with this perhaps reflecting current levels of uncertainty surrounding COVID-19.



KENT RESIDENTS SURVEY

Impact of tourism on resident wellbeing

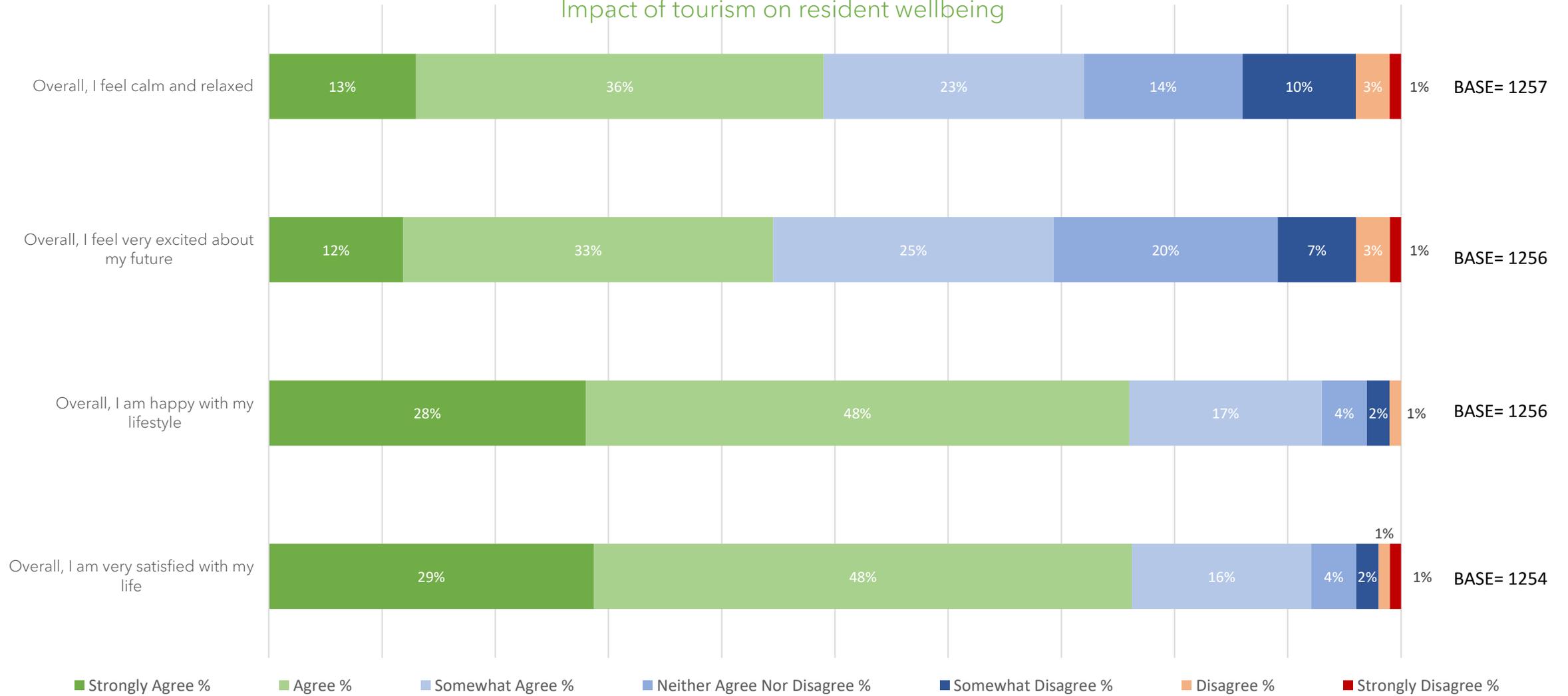


Figure 9: Graph showing the % of respondents and level of agreement with statements on the impact of summer tourism in local area on wellbeing

Impact of Summer Tourism on Emotional Connection

The survey then presented respondents with a list of statements about their perceptions of the impacts of summer tourism on their emotional connection to their local area prior to COVID-19, asking them to rate their level of agreement. Again, when analysing overall sentiment some responses have been combined, for example those that 'strongly agree', 'agree' and 'somewhat agree'. However, the full list of questions and percentages for each level of agreement and disagreement can be found in Figure 10 on page 36.

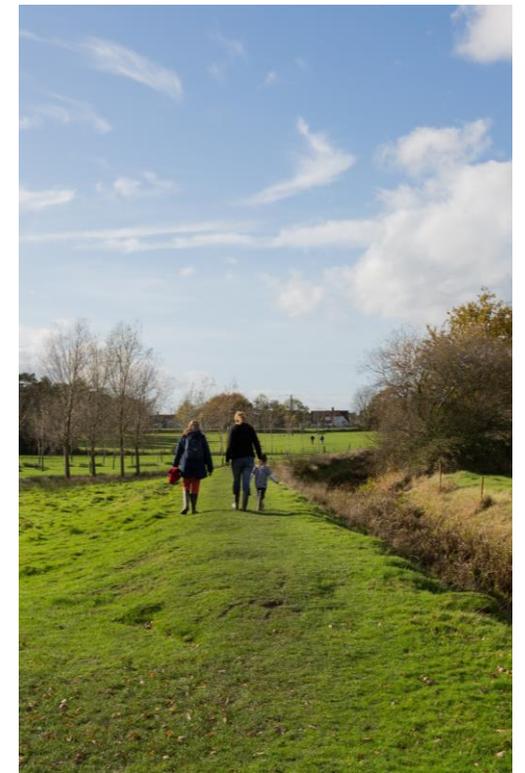
The Natural Environment

Firstly, respondents were asked to rate their agreement with the statement 'tourism protects and enhances the natural environment'. Findings show that **55%** of residents selected some level of agreement, followed by **23%** selecting 'neither agree nor disagree' and **21%** selecting either 'strongly disagree', 'disagree' or 'somewhat disagree'. But overall, this shows that the majority of residents do feel tourism benefits the environment and contributes to its conservation and development. However, outside of this **44%** did not agree with this statement, therefore highlighting an opportunity to raise the awareness of current efforts and to increase activity in particular areas of the county that may feel this more strongly.

Connection to the Local Area

Respondents were then asked to rate their agreement with statements relating to their connection to their local area. This included 'having visitors around helps me feel more strongly connected to my local area', with findings showing that the majority (**51%**) of respondents selected some level of agreement, with only **17%** disagreeing to some extent. However, **32%** of respondents selected 'neither agree nor disagree', indicating that although overall, residents enjoy and benefit from the presence of visitors, a significant proportion perhaps did not recognise this benefit. Following this, respondents were asked if they felt they lived in a beautiful area and if their local area was tranquil, peaceful and calm. Particularly for the former, residents felt strongly that the area was beautiful with **80%** selecting some level of agreement. And although not as high but still significant, **69%** of respondents agreed to some level their area was peaceful and calm. In all, insights show residents do have a strong sense of pride and ownership of their local area which was also mirrored by **89%** of respondents selecting some level of disagreement with the statement 'I dislike living here'.

82% of residents agreed that they live in a beautiful area*



*% of agreement is a combination of percentages of those that selected- 'strongly agree', 'agree' and 'somewhat agree'

KENT RESIDENTS SURVEY

Security

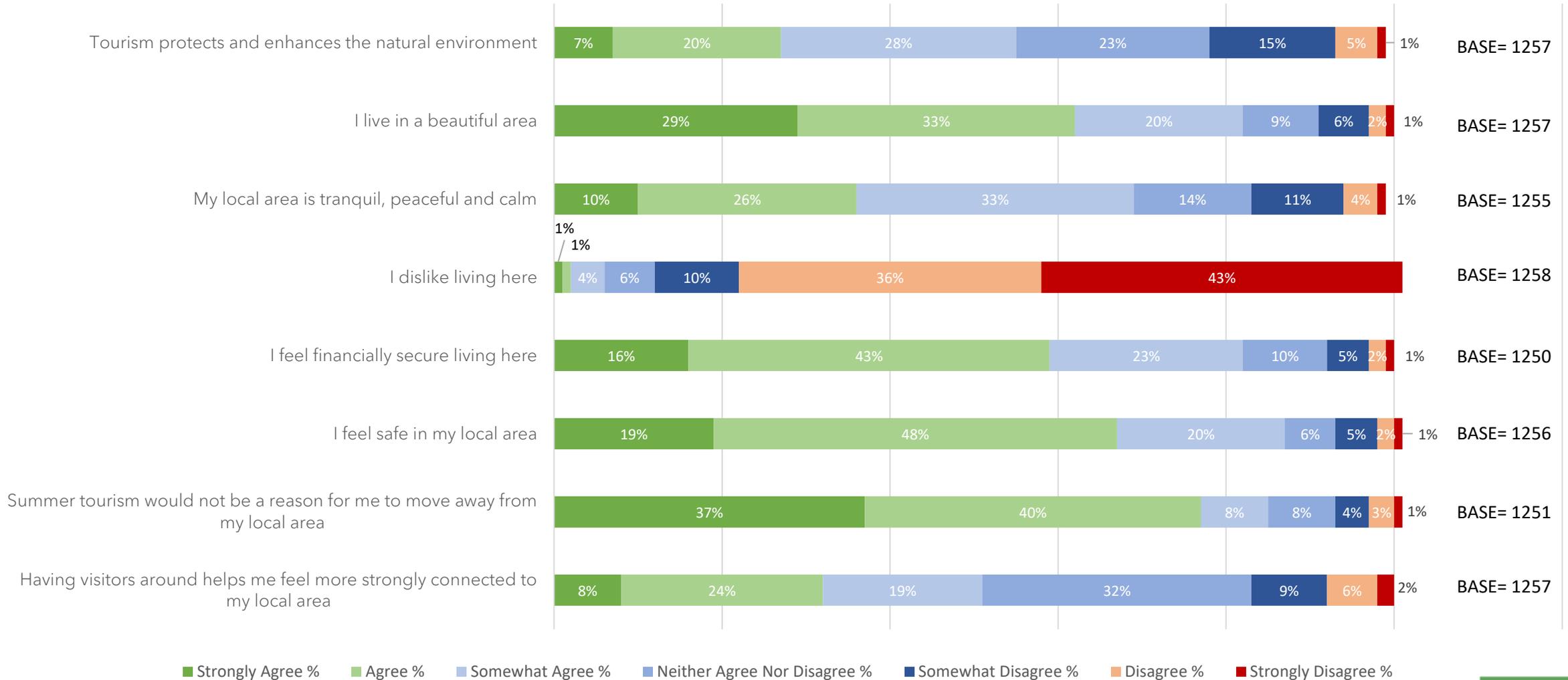
The survey then moved on to ask respondents to rate their agreement with statements relating to security and their intention to move away due to the impact of summer tourism. This firstly included gaining an insight into whether residents felt safe in their local area, with results showing that **87%** agreed with this to some degree, with the largest proportion (**48%**) selecting 'agree'. Following this, respondents were asked to rate their agreement with the statement 'I feel financially secure living here', with findings showing that the vast majority of residents (**82%**) agreed with this statement to some degree. And lastly, the survey asked respondents if summer tourism would be a reason for them to move away from their local area, with **85%** of respondents agreeing to some level this would not be a reason for them to relocate. In all, these insights show that Kent residents that completed the survey do feel safe and financially secure in their local area and that summer tourism and its impact would not affect their decision to move away.



	Agreement*
'I feel safe in my local area'	87%
'Summer Tourism would not be a reason for me to move away from my local area'	85%
'I feel financially secure living here'	82%

*% of agreement is a combination of percentages of those that selected- 'strongly agree', 'agree' and 'somewhat agree'

Impact of tourism on resident emotional connection



Strongly Agree % Agree % Somewhat Agree % Neither Agree Nor Disagree % Somewhat Disagree % Disagree % Strongly Disagree %

Figure 10: Graph showing the % of respondents and level of agreement with statements on the impact of summer tourism in local area on emotional connection

Impact on Emotional Connection- By Respondent Type

Age Category



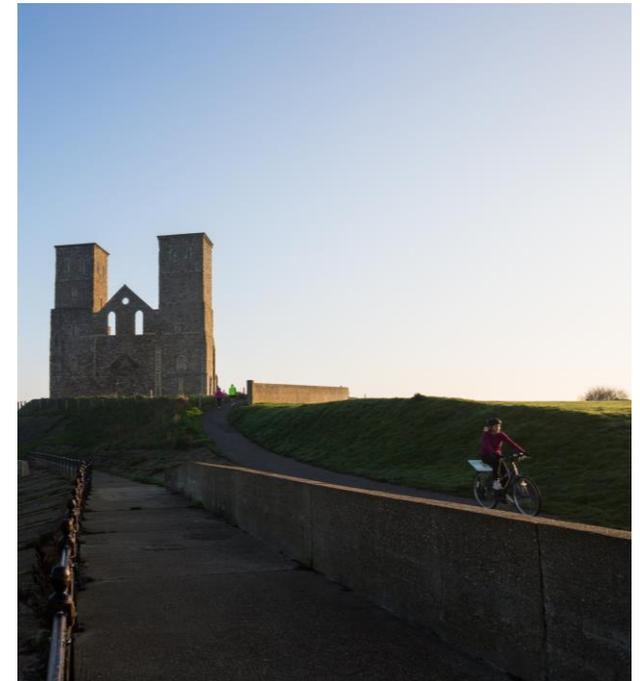
- Those aged 65 years and over agreed more so that having local visitors around them makes them feel more strongly connected to their local area (**56%** compared to **51%** for all respondents). This finding also supports the previously mentioned point that older residents have a stronger desire to meet with visitors in their local area and demonstrates this demographic's emotional connection to local visitors and tourism.
- Results also show that those aged 65 and over felt more strongly that tourism protects the natural environment, with **62%** displaying some level of agreement compared to **56%** for those aged 18-34 and **53%** for those aged 35-64. Again, these findings illustrate that on the whole younger age groups display a higher level of concern for the natural environment.

Those aged **65 years** and over agreed more so that having local visitors around them makes them feel more strongly connected to their local area

Years of Residency



- Looking at length of residency, those that had lived in their local area the longest did not agree as strongly with the statement 'tourism protects and enhances the natural environment', with **53%** agreeing with this statement to some degree compared to **60%** for those that had lived in their local area for under 5 years. This difference could be due to longer-standing residents witnessing adverse impacts to the natural environment over a longer period of time that they perhaps attribute to tourism activity.



KENT RESIDENTS SURVEY

Tourist Destination



- In terms of satisfaction and emotional connection, residents who perceive their area to be a tourist destination exhibited a higher level of agreement with the statement 'I live in a beautiful area', with **88%** agreeing to some level, compared to **69%** for those who did not perceive their destination to be a tourist area. A similar finding was also found for statements such as 'my local area is tranquil, peaceful and calm', among residents in tourist destinations with **72%** displaying some level of agreement versus **63%**.



- Residents in tourist destinations also displayed a higher level of overall satisfaction, with **92%** disagreeing to some level with the statement 'I dislike living here' versus **80%** for non-tourist destinations. When looking at the results for these questions in particular, findings demonstrate that overall, those who perceive their local area to be a tourist destination have an increased sense of pride and satisfaction. And although this may be due to other factors, findings especially in the context of the survey whereby summer tourism was cited, it could be said that tourism activity increases these factors.



Location



- Residents living in both rural areas and villages agreed more so with the statement 'I live in a beautiful area', with **93%** of those living in villages displaying some level of agreement, alongside **95%** in rural areas (compared to **82%** overall and **69%** in cities and **76%** in towns). This finding certainly highlights the sense of pride among those in more rural locations and is reflective of Kent's quality countryside offering as The Garden of England. However, overall, each type of location still displayed a strong level of agreement with this statement, with each of these locations having their own unique assets and features.



District

- When looking at findings for this section by district, residents in Dover (**64%**) and Tunbridge Wells (**56%**) displayed the highest level of agreement with the statement 'having visitors around helps me feel more strongly connected to my local area'.
- In terms of agreement with the statement 'I live in a beautiful area' when combining all three levels of agreement, this was highest among residents located in Dover and Folkestone & Hythe (both **97%**), in addition to Canterbury (**93%**), compared to **82%** among all respondents. For those located in Medway (**58%**) and Gravesham (**69%**) this agreement was lower compared to overall county results. However, this finding may be more reflective of these districts' offering compared to more coastal and rural areas with strengths in maritime, heritage and a more industrial product offering.



The Kent Downs AONB

- Nearly all (**95%**) of those in The KDAONB agreed to some level that their local area is tranquil, peaceful and calm, versus **69%** among all respondents, perhaps indicating the benefits the countryside and rural areas can bring to wellbeing in particular. To support this further, **100%** agreed to some level with the statement 'I live in a beautiful area', compared to **82%** for all respondents. These findings further emphasise that those in the KDAONB were more likely to feel strongly about their area in terms of these qualities, with this perhaps reflecting the quality and impact of the countryside on residents' sense of pride and perception of place.
- A higher percentage of those living in The KDAONB agreed with the statement 'tourism protects and enhances the natural environment' (**71%** versus **55%**), showing again that those who live in the KDAONB are more conscious of the impact of tourism to the natural environment.



KENT RESIDENTS SURVEY FINDINGS:

SOCIAL, CULTURAL & ECONOMIC IMPACTS:
POST-COVID



03

Social and Cultural Risks Post COVID-19

In order to monitor the impact on residents brought about by the COVID-19 pandemic, this section will look to outline findings from questions put to residents about the perceived social, cultural and economic risks facing their local area. To achieve this, respondents were presented with a series of statements regarding tourism in summer 2020 in light of the pandemic. When analysing sentiment among residents, options for some questions have been combined, for example those that 'increased a lot' and 'increased a little'. However, a full list of questions and percentages for each response can be found in Figures 12/14 on page 45/48.

Firstly, respondents were asked about their summer activity, and were presented with a series of options regarding possible travel behaviour. As illustrated in Figure 11, the majority of residents (**63%**) stayed at home due to COVID-19, with only **5%** staying at home as they normally would have. And when looking at residents that did take a trip away from home, **20%** went on a trip outside of Kent as they normally would and **6%** went on a trip within the county, with **6%** also taking a trip outside of Kent due to pandemic.

When cross-referencing summer activity with age category, findings show residents over the age of 65 were more likely to have stayed at home because of COVID-19 (**70%** compared to **63%** overall), most likely due to the increased health risk of the virus to this age group. And in terms of travel outside of Kent due to COVID-19, this was highest among residents aged 18-34 years (**12%** compared to **6%** overall), again this could be due to this groups perceived lower health risks. But overall, residents summer travel plans were impacted with many plans being cancelled or having to be rearranged.

Resident Summer Activity (%)

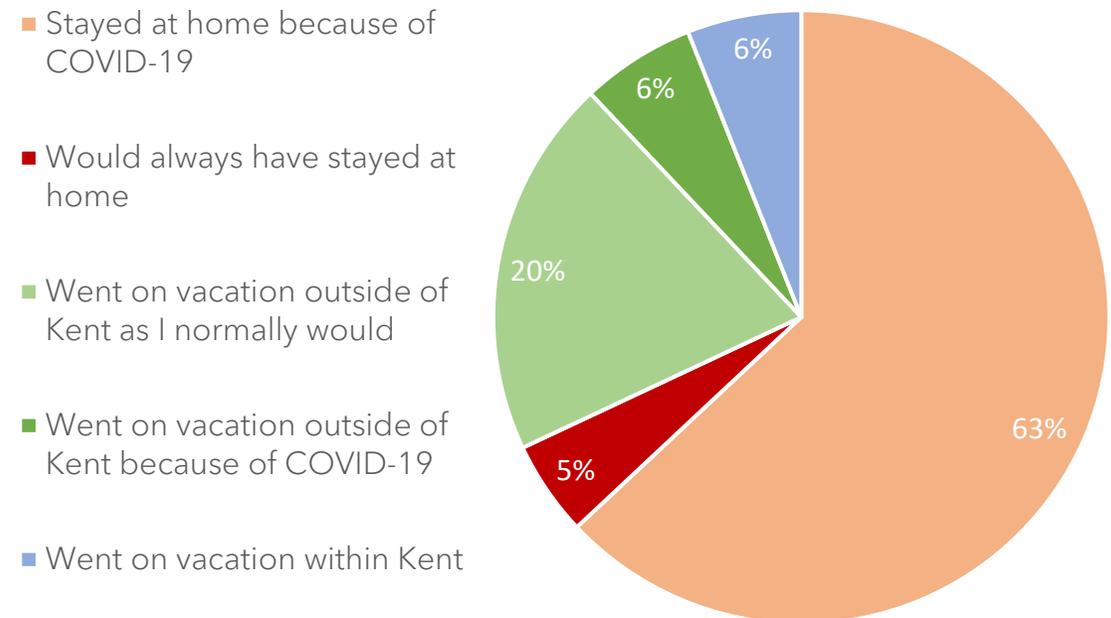
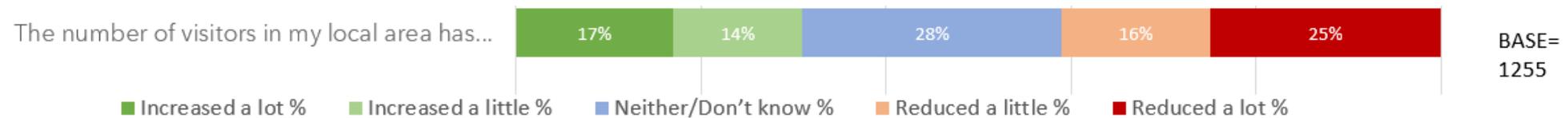


Figure 11: Graph showing the % of respondents and their 2020 summer activity
BASE=1257

Change in Visitor Numbers

Respondents were asked if the number of visitors in their local area had changed during summer 2020 as a result of the COVID-19 pandemic. Findings show that the largest proportion of respondents (**28%**) selected that this had not changed or that they did not know. However, when combining responses for 'reduced a little' and 'reduced a lot', **41%** of residents observed a reduction in visitor numbers, with the remaining **31%** selecting either 'increased a lot' or 'increased a little'. These findings are representative of the general impact of the pandemic, with many local residents opting to stay at home as previously mentioned, resulting in areas in Kent receiving less visitors compared to a traditional summer pre COVID-19. And although during certain parts of the summer restrictions and lockdowns were eased, sentiment and confidence among visitors was cautious.



Participation and Availability

The survey then presented respondents with a series of statements relating to the availability of local attractions and recreational facilities/activities. When asked about the latter, only **6%** of residents stated this had increased to some degree, with **71%** selecting either 'reduced a little' or 'reduced a lot'. Following this, respondents were asked if the number of cultural attractions available to visit such as exhibitions and events had changed, and again this saw a significant reduction during the summer of 2020, with the largest proportion of respondents (**44%**) selecting 'reduced a lot'. Together these findings demonstrate that the availability of places to visit and facilities decreased greatly for many residents due to the impact of the pandemic.

Consequently, respondents were also asked about their participation and engagement in activities, and as expected the number of residents taking part in cultural and recreational activities saw a significant reduction, with **84%** selecting either 'reduced a lot' or 'reduced a little'. However, this reduction was not as high for use of local attractions and facilities, with **29%** selecting either 'increased a lot' or 'increase a little'. And while the largest proportion stated this had remained the same or it had reduced to some degree, the percentage of residents whose engagement with these increased more so compared to other areas previously mentioned. So again, while the pandemic has greatly impacted residents' access and participation with local amenities and activities, there was an increase in engagement among some residents with local attractions and facilities, perhaps due to the increased time spent in the local area and their reliance placed on local facilities. And residents who observed a decrease in visitor footfall were also more likely to have experienced a decrease in participation with local facilities and attractions, compared to areas where residents observed an increase in visitors (**72%** vs. **15%**).

KENT RESIDENTS SURVEY

INCREASE IN VISITORS

- Rural areas (34%) and villages (33%) saw a slightly larger increase in visitors compared to overall results (31%), with this perhaps being due to residents seeking out areas with more open natural spaces such as countryside walks and beaches.
- Residents who perceived their area's main attraction to be the coast/beach observed a larger increase in visitors compared to overall results (49% vs. 31%), again perhaps indicating visitors desire to visit more open spaces such as beaches.
- Areas where residents observed a particular increase in visitors were Thanet (53%), Canterbury (51%) and Folkestone and Hythe (47%), all of which are major Kent coastal destinations.

- Those located in cities observed the lowest increase in visitors (16% vs. 31%), most likely due to more attractions being closed, with visitors seeking out countryside and coastal areas instead, due to COVID-19 restrictions and wanting to visit places that are perceived to be less crowded.
- Residents of Tunbridge Wells (55%) observed the largest decrease in visitors compared to overall findings, which could be due to the importance of their retail/high street offering.
- Availability of cultural attractions to visit reduced more so for those that saw a decrease in visitors (89% vs. 46%), alongside the availability of recreational facilities and opportunities (82% vs. 67%)

DECREASE IN VISITORS

- This diagram outlines findings for those residents who observed an increase or decrease in visitors and highlights that open and natural spaces such as the countryside and coast saw the larger increase in visitors.
- This supports research around visitors' desire to visit these places following the pandemic, that are perceived to be less crowded and have a larger outdoor activity offering.

Residents who perceived their local area to have a strong heritage/museum offering, were more likely to cite that the number of residents using local attractions/facilities have decreased (47% vs. 40%)



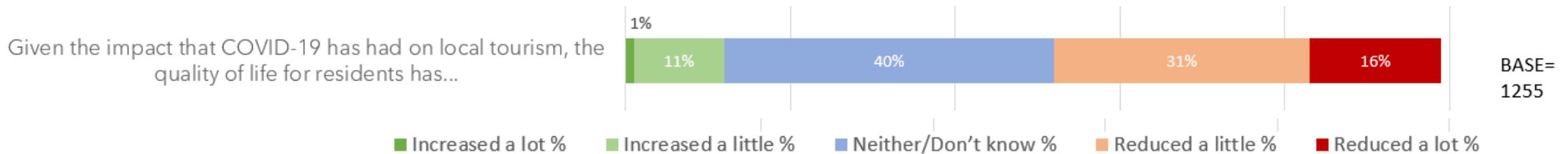
AVAILABILITY & PARTICIPATION



Quality of Life

Looking further into the social impact of COVID-19 over the summer, respondents were asked if the quality of life for residents has been affected, given the impact the pandemic has had on local tourism. Findings show that **47%** of residents felt this had either 'reduced a little' or 'reduced a lot', with the largest proportion (**40%**) of residents selecting 'neither/don't know'. Looking at findings for this question by location, quality of life decreased more so for residents living in areas where the main attraction was perceived to be the coast/beach, with **52%** selecting either 'reduced a little' or 'reduce a lot', compared to **47%** overall and **38%** for residents whose main attraction was the countryside.

When looking at results by district, those living in Thanet (**59%**), Canterbury (**53%**), Medway and Dover (both **52%**) saw quality of life reduced more so compared to overall results (**47%**). For residents in Thanet this could be due to these areas receiving an increase in footfall which may have caused disruption to residents, whereas in Canterbury this could be due to the decrease in visitors impacting resident's ability to access local attractions and facilities they are used to as part of their lifestyle. All in all, findings demonstrate that the impact of COVID-19 on tourism has had a direct impact on residents' quality of life. Many areas have seen a decrease in visitors, which has directly resulted in less availability and participation in local attractions and facilities, which consequently may have also had a negative social impact on residents.



Social and cultural risks facing your local area in light of COVID-19

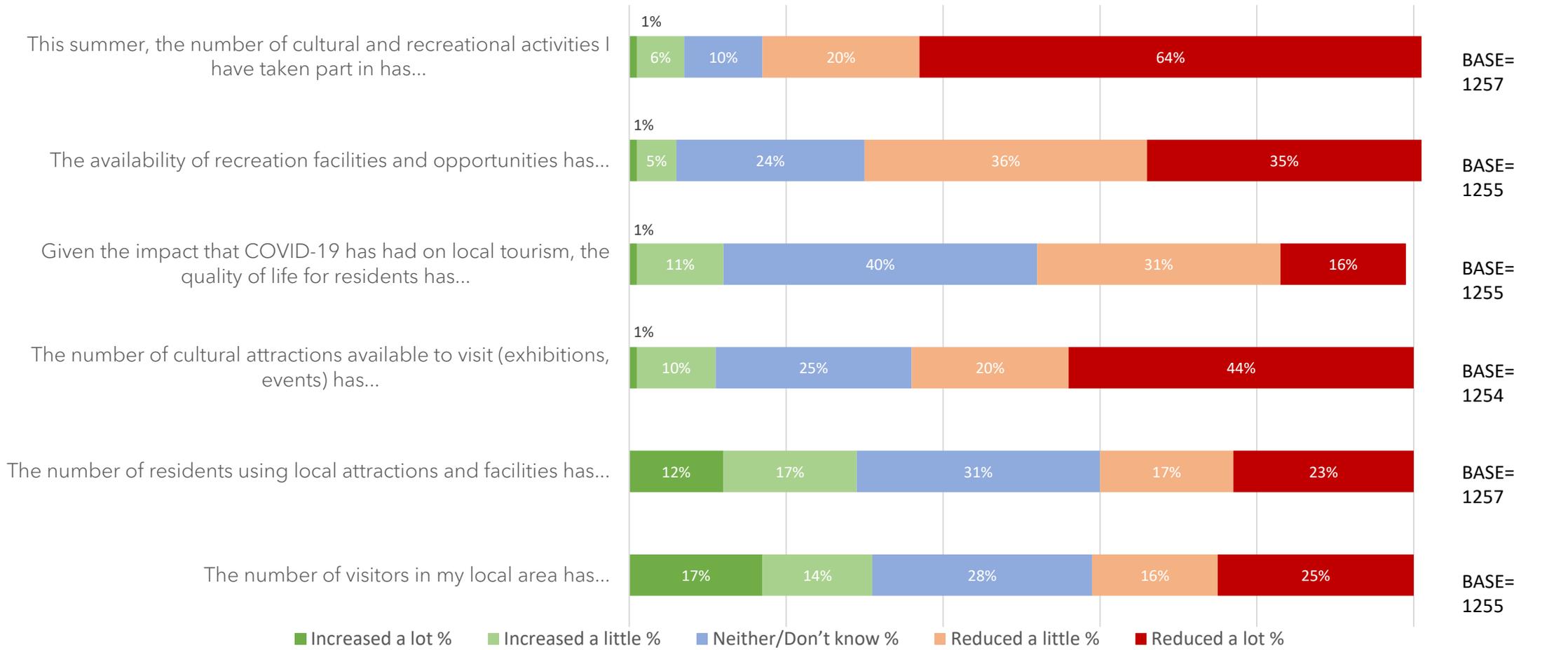


Figure 12: Graph showing the % of respondents and level of agreement with statements on various social and cultural risks facing their local area in light of COVID-19

Economic Risks Post COVID-19

Financial Impact of COVID-19 on Household

The survey then looked to address various economic risks in light of the impact of COVID-19 on summer tourism. Respondents were asked to give insight into the impact on their household's financial situation, with the largest proportion (55%) stating this has 'stayed the same'. However, this was then followed by 27% citing this had 'worsened slightly' and 9% stating this had 'worsened significantly', with only 9% specifying this had 'improved'. Generally, findings show that residents' financial situation remained fairly consistent, however with 36% being affected negatively, the pandemic will have inevitably changed many residents' situation for the worse.

Findings also show that residents aged 65 years and over were less likely to be negatively impacted financially, with only 26% stating this had worsened to some degree, compared to 41% of those aged 35-64 years and 36% of those aged 18-34 years. However, it is likely that this is due to the older demographic being of retirement age and therefore being less likely to be affected by issues such as redundancies and loss of earnings.

Respondents located in the city were also more negatively impacted financially compared to findings overall, with 46% stating their financial situation had 'worsened slightly' or 'worsened significantly', compared to 36% for all Kent respondents.

Household financial situation since COVID-19

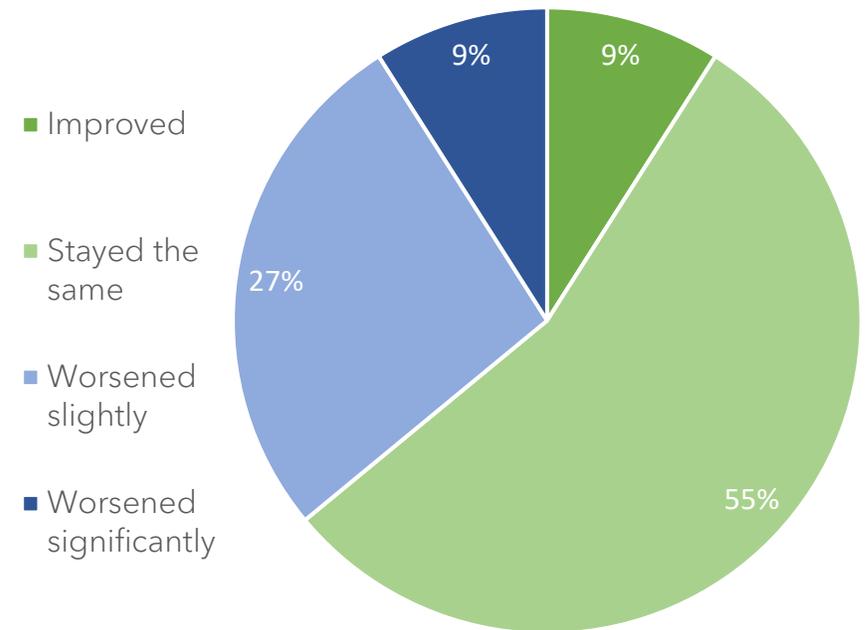
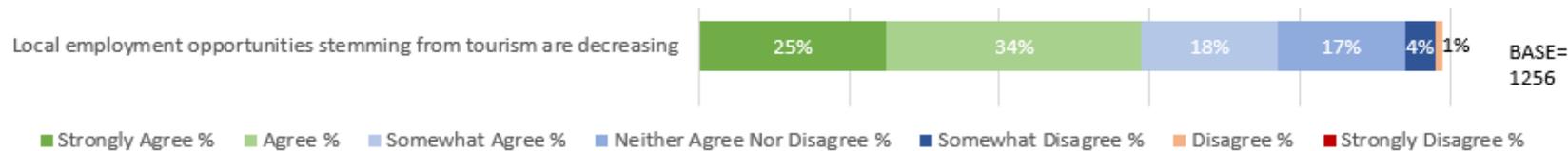


Figure 13: Graph showing the % of respondents and the impact on their household finances following COVID-19 BASE=1255

Local Economy & Employment

As previously highlighted, results do show that residents recognise the value tourism brings to the local economy and its role in supporting employment. However, when asked if local employment opportunities stemming from tourism are decreasing, **77%** of residents expressed some level of agreement with this statement. Further to this, a similar response was seen when asked if the local economy is declining, with **72%** agreeing to some level. However, this could be short-term sentiment due to the significant impact the pandemic has had on the travel and tourism sector. And with many visitor attractions and hotels being forced to close, when restrictions begin to ease, and places begin to re-open, this may be a viewpoint that improves and recovers.



Local Investment & Infrastructure

The survey then looked more towards local investment and infrastructure, initially asking residents to rate their agreement with the statement 'local investment, development and infrastructure spending is declining'. Findings for this predominantly show that residents feel this is the case, with **59%** selecting some level of agreement, alongside **31%** selecting 'neither agree nor disagree'. Mirroring this sentiment, when asked if local infrastructure is improving, for example public toilets, car parks, footpaths and cycle paths, only **17%** displayed some level of agreement with this statement, with the majority of respondents (**57%**) disagreeing with this to some degree.

Transport Services

Finally, this section also looked to gain an insight into views on local transport development. To achieve this, respondents were asked to rate their agreement with the statement 'local transport services are improving', with findings showing that a significant proportion (**47%**) expressed some level of disagreement, followed by **45%** selecting 'neither agree nor disagree'. This indicates that overall, this is still an area that needs improvement, and as mentioned previously transport links and connectivity is an issue for more rural areas and therefore activity is needed to help improve connectivity in these types of destinations in particular. However, when looking at agreement with this statement, this was higher among residents who had observed an increase in visitor numbers (**13%** vs. **6%**), perhaps reflecting work to meet demand by providing services and strong connections to facilitate visits.

Economic risks facing your local area in light of COVID-19

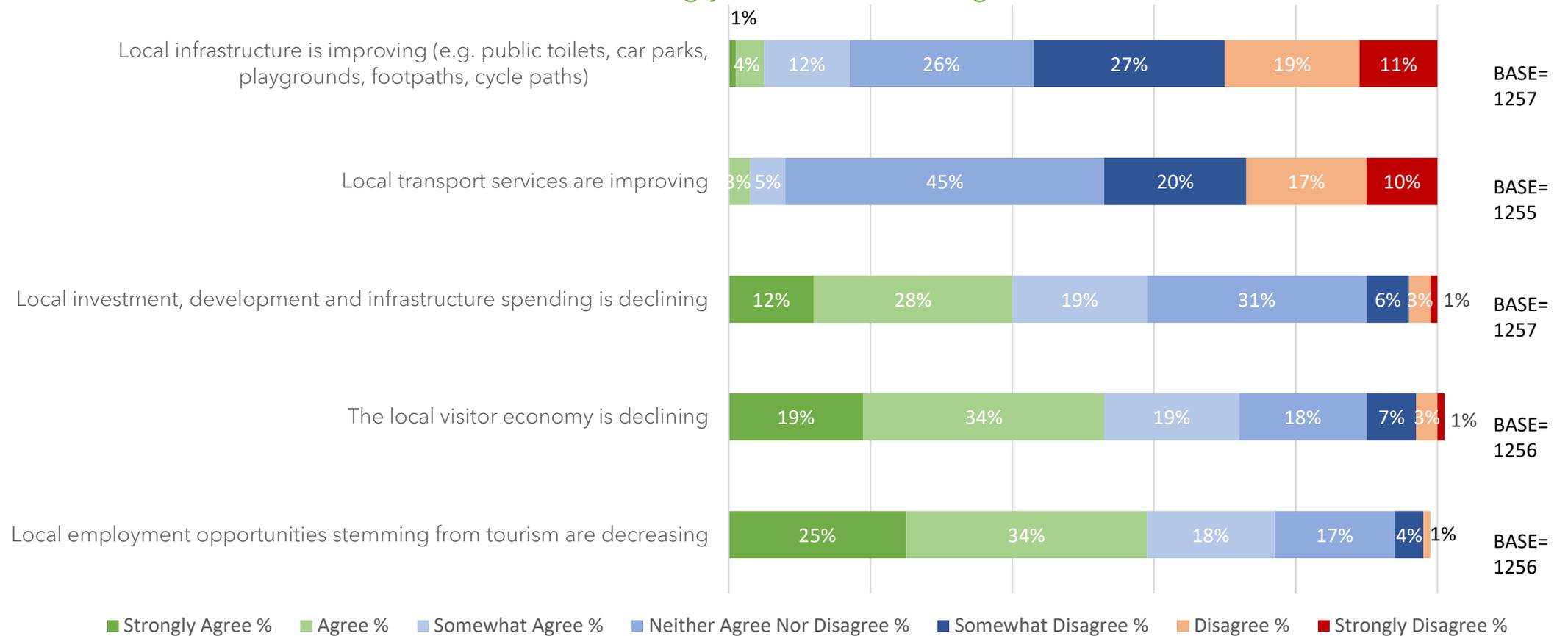
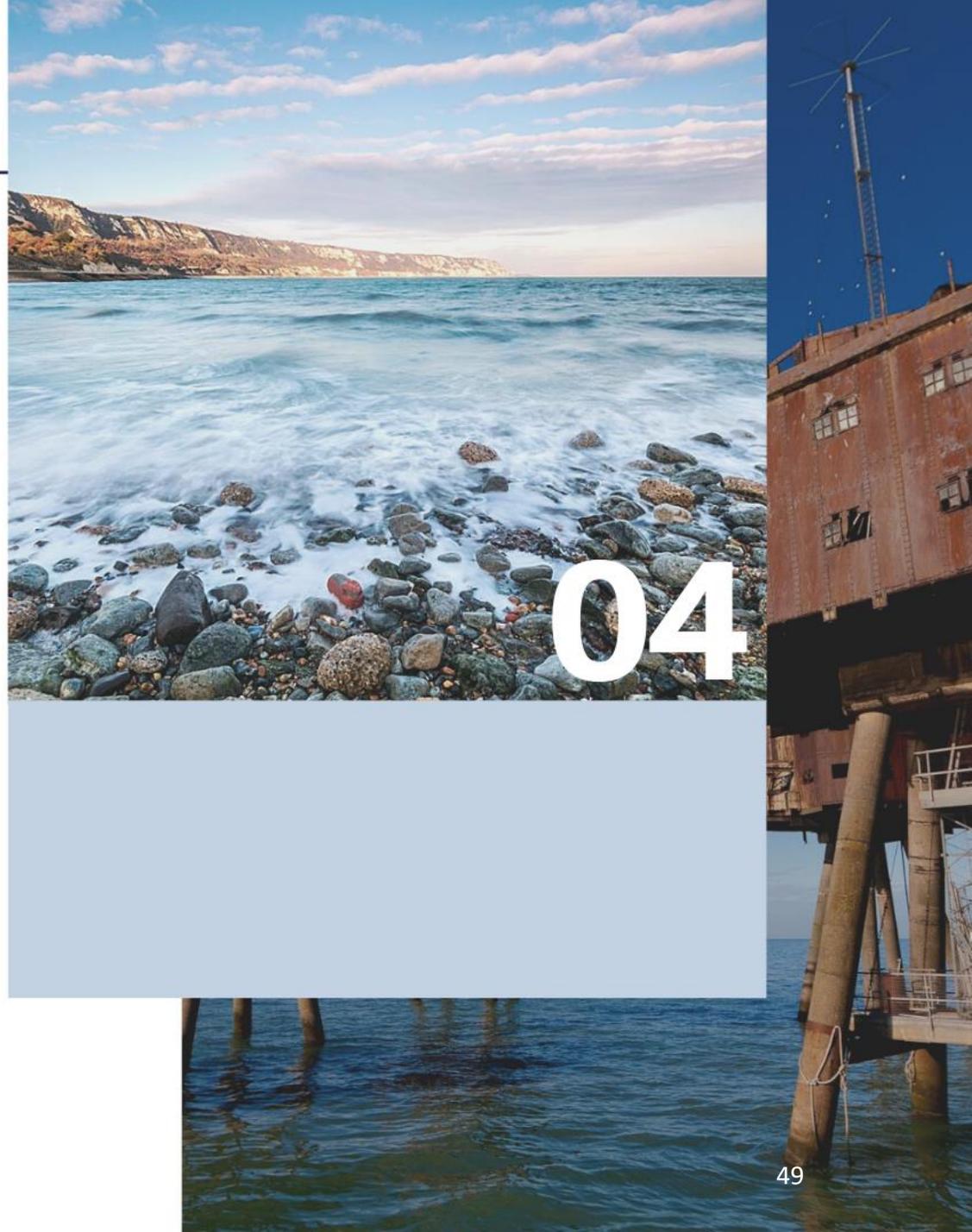


Figure 14: Graph showing the % of respondents and level of agreement with statements on various economic risks facing their local area in light of COVID-19



KENT RESIDENTS SURVEY FINDINGS:

IMPACT ON EMOTIONAL CONNECTION POST-COVID

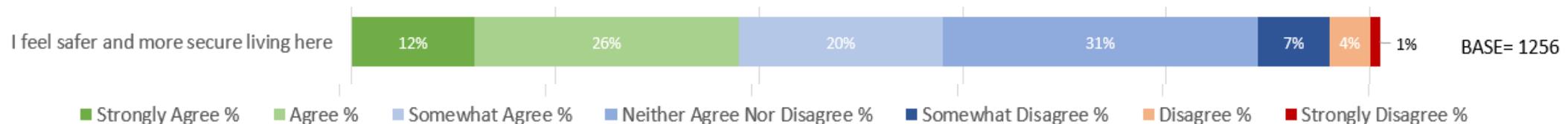


Resident Satisfaction

This next section of the survey looked to measure any changes in resident's emotional connection to their local area, brought about by the impact of the COVID-19 pandemic on tourism in their local area. Again, respondents were presented with a series of statements, related to resident's satisfaction and perception of their local area. Firstly, respondents were asked to rate their agreement with the statement 'my local area is more tranquil, peaceful and calm', with results showing that **49%** of respondents agreed with this statement to some degree. This was then followed by **29%** selecting 'neither agree nor disagree'. But overall, results indicate that this sentiment increased for a significant proportion of residents, perhaps due to areas being less crowded. Following this, the survey asked respondents to rate their agreement with the statement 'I dislike living here', with **85%** of residents disagreeing with this to some extent, compared to a slightly higher proportion (**89%**) expressing this pre COVID-19.

Safety & Security

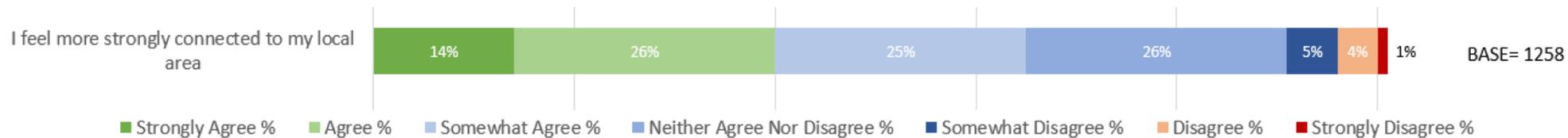
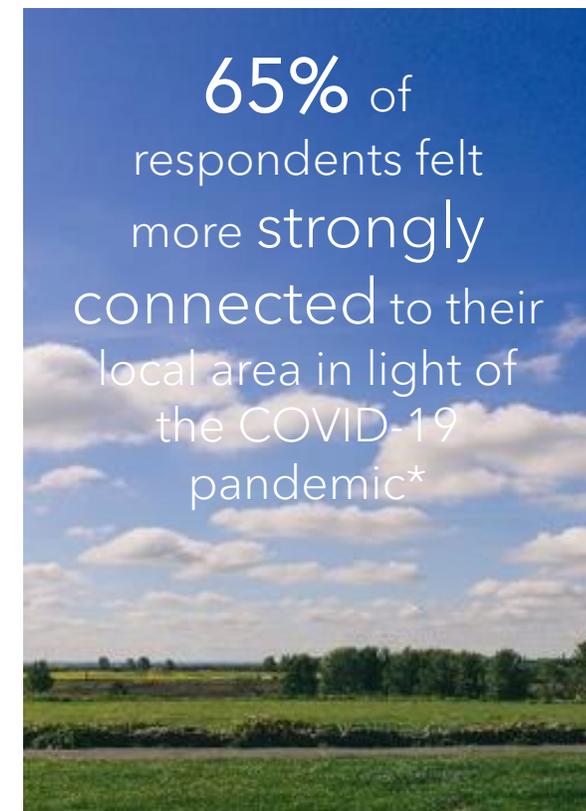
Respondents were also asked to rate their agreement with the statement 'I feel safer and more secure living here'. For this, results show that the majority of residents (**58%**) expressed some level of agreement, which included **26%** selecting 'agree'. This was then followed by just under a third of respondents (**31%**) selecting 'neither agree nor disagree', and only **12%** expressing some level of disagreement. This indicates that in general residents have experienced an increase in connection to their area in terms of safety and security, potentially facilitated by the increased time spent in their area compared to a typical summer and the familiarity that comes with this.



Connection to the Local Area

Responses from previous questions show that overall, residents still feel content in their local area following COVID-19 and feel an increased sense of safety and security. In support of this, when asked to rate their agreement with the statement 'I feel more strongly connected to my local area', **65%** selected either 'strongly agree', 'agree or 'somewhat agree'. For this question findings also show that only **10%** expressed some level of disagreement, alongside **26%** selecting 'neither agree nor disagree'. This connection was also stronger for those who perceived their local area's main attraction as the countryside, with **70%** expressing some level of agreement versus **65%** for all respondents, and **64%** for both coast/beaches and museums/historic sites. This highlights the potential positive impact that green spaces can have on residents' wellbeing and attachment to their local area. Alongside this, residents living in Dover (**72%**), Sevenoaks (**71%**) and Tunbridge and Malling (**74%**) expressed the highest overall agreement with this statement.

And finally, when asked to rate their agreement with the statement 'I will not move away from my local area', **74%** selected either 'strongly agree', 'agree or 'somewhat agree', which included the largest proportion of respondents (**33%**) selecting 'strongly agree'. An increase in connection to their local area again may be representative of the increased time spent in the area due to COVID-19, and their engagement with local facilities and outdoor spaces, with those in the countryside feeling this more in particular, illustrating the potential impact of the natural environment on wellbeing. As Dover, Sevenoaks and Tonbridge and Malling have a strong countryside offering this is also reinforced through these findings, with West Kent's rural landscape and The White Cliffs County, and links to the Kent Downs and the North Downs Way in Dover.



*This includes all those respondents that selected either 'strongly agree', 'agree' or 'somewhat agree'.

KENT RESIDENTS SURVEY

Impact of the COVID-19 pandemic on resident's emotional connection to their local area

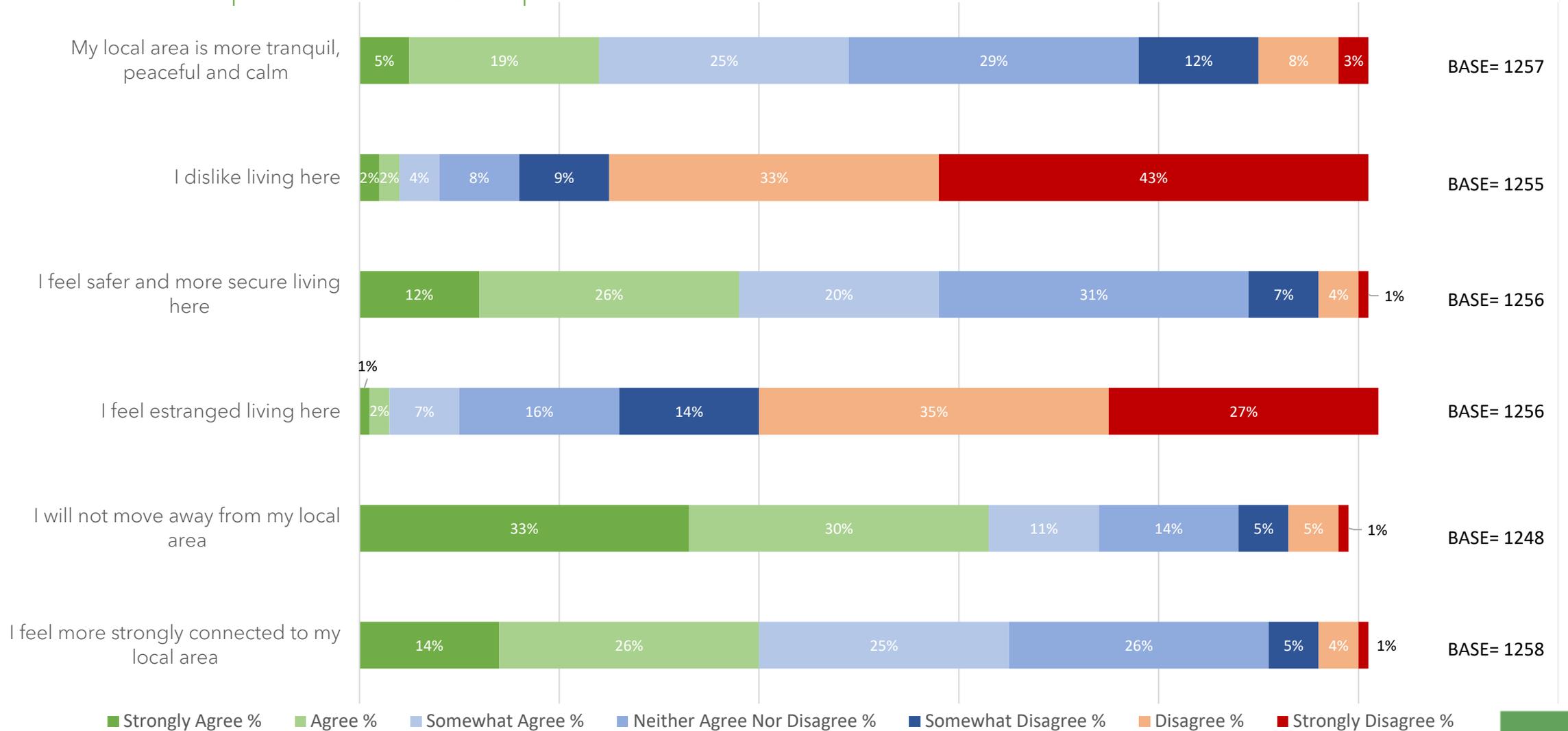


Figure 15: Graph showing the % of respondents and level of agreement with statements relating to the impact of COVID-19 on emotional connection to their local area



KENT RESIDENTS SURVEY FINDINGS:

KEY IMPACTS OF TOURISM & OVERALL SUPPORT



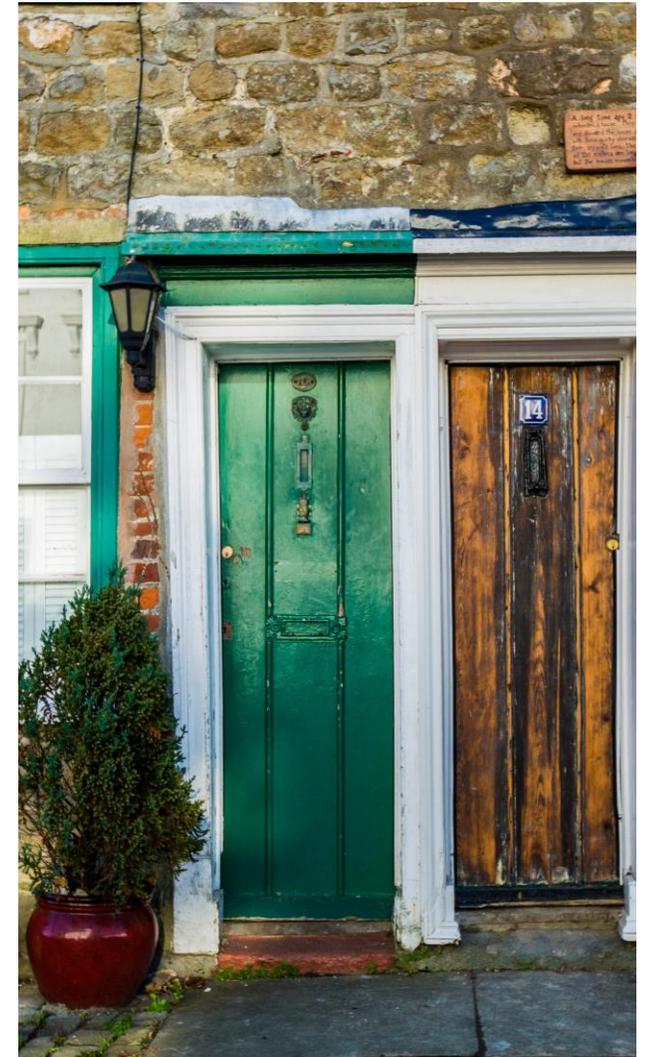
05

Top 3 Positive & Negative Impacts of Tourism

This section of the report looks to outline findings from the survey which asked respondents to specify the top three positive and negative impacts of tourism on their local area. In asking respondents this, it not only allows for the main pros and cons from the perspective of residents to be identified, but also captures more details as this was an open-ended question. The diagram below highlights the top ten positive impacts of tourism on their local area cited by respondents. These have been ordered by the frequency in which they were mentioned.

Positive

1	The Economy - Boosts the local economy	2	Supports jobs - Increases local employment opportunities
3	Business benefits - Supports local businesses, greater number of businesses able to operate and benefit from spending	4	Improved local services & facilities - Increased services, more leisure facilities & increased investment in facilities
5	The people - Meeting new people, people enjoying the area and discovering local sites	6	Promotes local area - Increases interest in visiting the local area and county
7	The Beach - Local people being able to enjoy the beaches	8	Events - More events for local communities to enjoy, including cultural & seasonal events
9	Quality food and drink - Variety and quality of food and drink on offer	10	Attractions - Range of attractions to visit, keeps attractions open, upkeep of heritage attractions, supports and preserves sites



The diagram below then highlights the top ten negative impacts of tourism on resident's local area. These have been ordered by the frequency in which they were mentioned

 **Negative**

<p>1 Litter/pollution - Increased litter, mess left by tourists</p>	<p>2 Parking - Lack of available parking, inconsiderate parking, increased costs</p>
<p>3 Traffic - Congestion and busy roads and air pollution</p>	<p>4 Overcrowding - Too many visitors and people in local area</p>
<p>5 Anti-social behaviour - Increased anti-social behaviour and crime as a result of increased visitors</p>	<p>6 Beach - Increased pollution, overcrowding and inconsiderate behaviour on beaches in particular</p>
<p>7 Noise - Increased noise due to numbers of visitors</p>	<p>8 Tourists - Includes lack of consideration by tourists, competition for resources between tourists and residents</p>
<p>9 House prices - Increased house prices in the area as a result of tourism</p>	<p>10 Local towns/roads- Includes damage to roads and run-down town centres</p>



Responses show that the most commonly cited positive impact of tourism was the contribution to the economy, followed by local employment opportunities, with this positive sentiment being previously highlighted in the report by residents also. Alongside this, a significant number of residents cited that tourism was beneficial to local businesses, allowing for a greater number of local businesses to operate and benefit from tourist spending. Another impact commonly mentioned was the positive impact tourism brings to local services and facilities, with many citing that this increases the availability of services and leisure facilities and investment. Residents also felt strongly about the impact of tourists visiting the local area, citing opportunities to meet new people and that tourism gives people the opportunity to enjoy and discover the local area and sites. Further to this, residents also felt that tourism promotes the local area and drives interest among visitors. Other aspects commonly recognised by respondents included the quality of beaches and the food and drink offering, alongside events for local communities to enjoy and the range and preservation of local visitor attractions, particularly sites of historical importance.



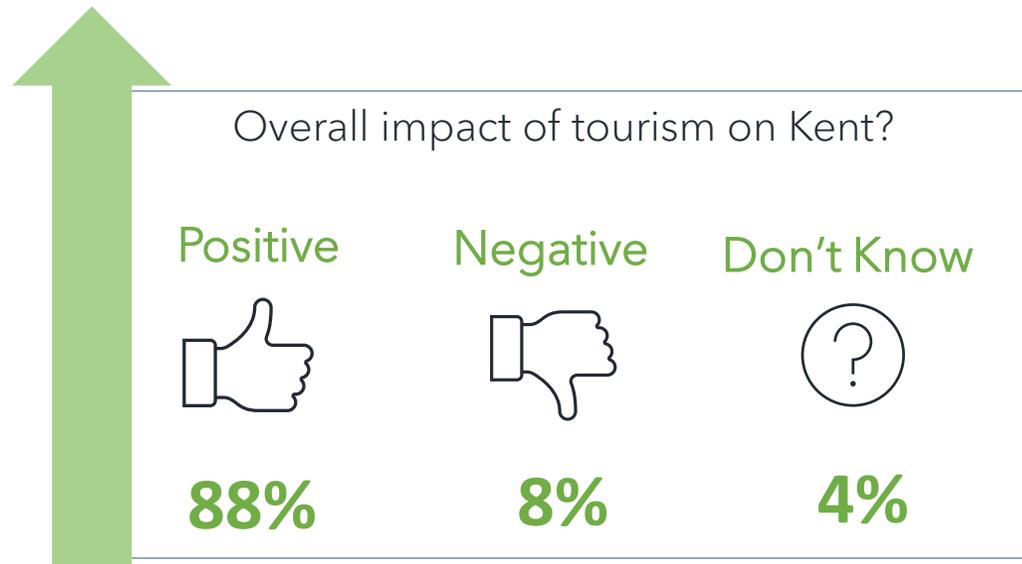
When looking at the negative impacts of tourism cited by respondents, as shown in the previous diagram, a commonly cited theme was tourism's adverse impact in terms of litter and pollution to beaches, overcrowding of certain areas and traffic congestion.

Alongside this, residents raised the issue of lack of available parking and increasing costs which were previously highlighted as an area of concern earlier in the report. Other negative impacts mentioned, included a lack of consideration from tourists and in some cases anti-social behaviour, in addition to competition for resources between tourists and residents.

Overall Support

Finally, the survey looked to gain an insight into respondents' overall feelings and support of summer tourism in their local area. As illustrated in Figure 16, when asked to rate their agreement with the statement 'I support summer tourism in my local area', **88%** selected either 'strongly agree', 'agree', or 'somewhat agree', which included **41%** selecting 'agree'. Following this, respondents were asked what they felt the overall impact of tourism on Kent was, with results showing that the majority (**88%**) felt this was positive.

Overall, results indicate that residents have a strong sense of support for summer tourism in their local area and that overall, the impact on the area is positive, with only **4%** displaying some level of disagreement.



BASE=1035

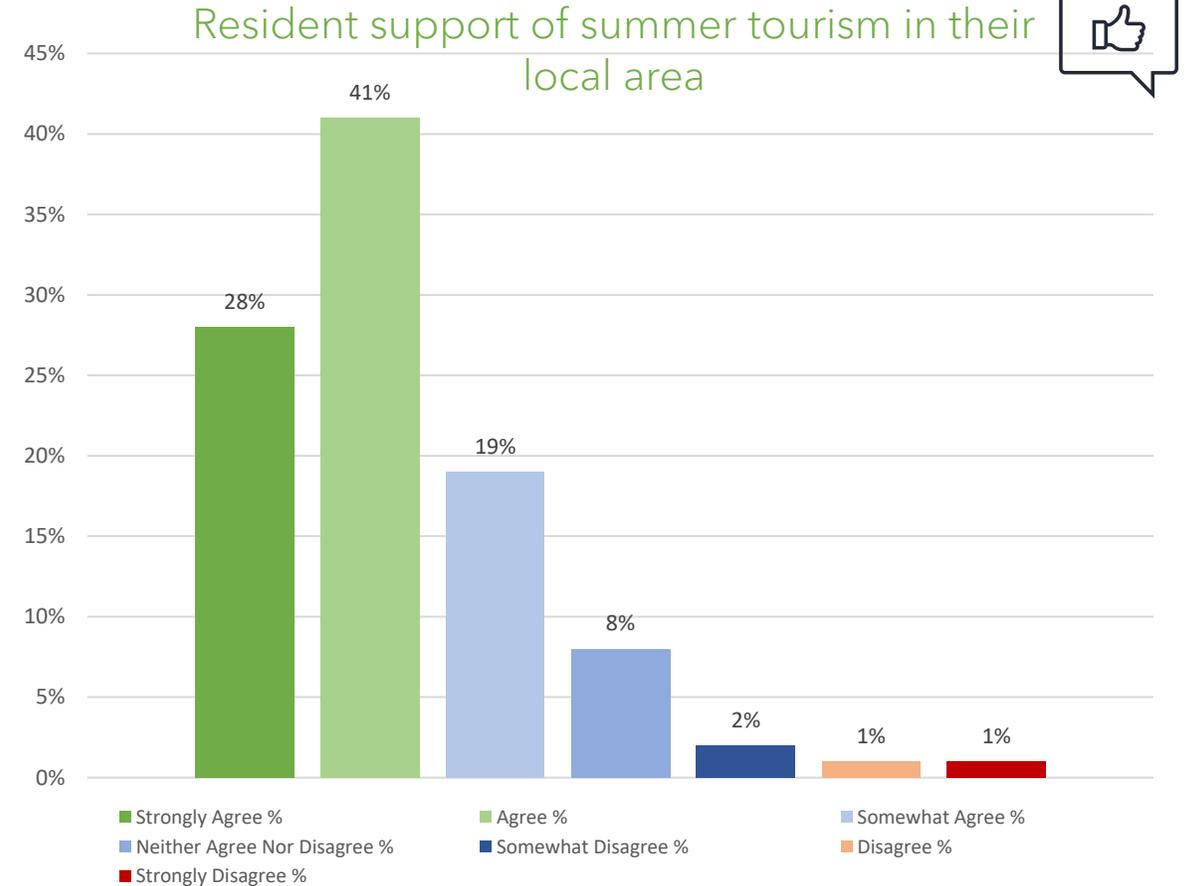


Figure 16: Graph showing the % of respondents and their level of agreement with the statement 'I support summer tourism in my local area' BASE=1239

Perception of Offering

The largest proportion of Kent residents perceived their area's main attraction to be the coast/beach, followed by museums and historic sites/buildings and the countryside. Overall, these results highlight Kent's varied product offering and the strong recognition of this among residents, particularly in these three areas. Each type of offering also mirrors the Visit Kent Visitor First Strategy, capturing the rural offer in West Kent, the coastal towns of East Kent and the strong maritime and heritage product in the North. And while other attractions did not rank as highly, such as outdoor attractions, this presents an opportunity to build upon this and to develop and showcase Kent's outdoor activity offering, which is an integral aspect of experiential tourism and holds great potential.

The majority of Kent residents did perceive their local area to be a tourist destination and those living in coastal areas were more likely to think so, compared to those situated in more rural areas. This illustrates the popularity of the county's coastal offering to tourists.

Key Findings & Recommendations

Overcrowding

Residents did not strongly feel that there were too many visitors in their local area, particularly those living in Gravesham, Medway, Maidstone, Tonbridge and Malling and Tunbridge Wells. Although, those living near to the coast/beach and Canterbury, were more likely to express the sentiment that their local received too many visitors.

This perhaps indicates an opportunity to raise the awareness of particular districts and lesser-known destinations, to manage visitor dispersal in more crowded destinations and types of attractions such as popular beaches and coastal spots. To achieve this, the visitor strategy can be reviewed to regulate visitor flow and the destination touchpoints, to relieve pressures.





Impact to the Natural Environment

Findings also raised the issue of tourism's impact to the environment and a slight unease about this among residents, perhaps driven more so by the increasing attention and pressure on organisations and authorities to align efforts with conservation and sustainability. Agreement that tourism can be harmful to the natural environment was higher among younger residents, emulating the growing consciousness of sustainability amongst the younger generation, with this demographic leading the way on bettering consumer behaviour.

Residents living near coastal areas were also more likely to perceive tourism's impact on the environment negatively, indicating the need for better planning to reduce harm to coastal areas in particular, including issues such as pollution, litter and overcrowding. However, those living in the KDAONB also felt more strongly that summer tourism can result in harm to the environment in their local area. This demonstrates the need to reduce adverse impacts of tourism in more rural areas and ensure that tourism activity aligns with these concerns. Efforts and initiatives carried out through the project should be shared with local communities, with the hope that their perception will improve over time.

Meeting Visitors

On the whole, Kent residents do like to engage and interact with visitors in their local area, particularly residents over the age of 65. This sentiment was also higher among residents from Thanet and Dover, alongside those situated in the KDAONB.

This response also supports trends around the demand for authentic, local experiences, involving meeting with local people, venue owners and utilising local knowledge and sharing unique aspects about the destination.



Parking Concerns

Findings highlighted that residents' perception on the lack of available parking could be improved upon and subsequently raise resident satisfaction, particularly in towns and villages where this may be limited and visitors are having to rely on car travel due to the lack of public transport services to more rural locations in particular.



Preservation

Local residents showed strong recognition of tourism's role in driving the demand for historical sites, which in turn allows income generated to be reinvested into their preservation and maintenance, which ultimately benefits local communities. And agreement with the latter, was highest for those living in Medway and Dover District, which is perhaps reflective of both areas' strong heritage offering including sites such as Dover, Deal and Walmer Castle and several English Heritage properties, Rochester Cathedral and The Historic Dockyard, Chatham in Medway. Furthermore, any activity that looks to preserve such sites, is likely to resonate well with local residents.

Local Services and Prices

While on the whole residents felt they are still able to access local facilities and services, they do feel that tourism can result in an increase in prices locally. And those living in coastal areas and particularly those from Canterbury and Thanet felt more so that summer tourism can reduce access to facilities. Moreover, this highlights the need to relieve pressure on services and facilities in these areas in particular for local communities in the busier summer months.



Contribution to the Economy and Employment

Residents strongly acknowledged tourism's contribution to the local visitor economy and local employment opportunities. However, post COVID-19 there was a feeling among residents that these benefits are decreasing with regards to its economic benefits and job prospects. However, this is most likely to be a short-term sentiment due to the significant impact the pandemic has had on the travel and tourism sector, with many employees being placed on furlough and redundancies being made. And with many visitor attractions and hotels being forced to close, when restrictions begin to ease and places begin to re-open this perception will most likely recover to its pre-COVID value to local communities. As we move to the recovery stage post-COVID, repurposing tourism as a supporter of the community and promoting local businesses and sourcing local will drive economic growth and support of local communities. And by attracting visitors off-season with bookable experiences with overnight stays, this can contribute towards rebuilding local economy and job prospects and increase the resilience of local businesses. It will therefore be useful to track this trend over time, to see if resident perceptions begin to improve, although this will also be heavily dependent on government guidelines and restrictions in place.



Investment & Infrastructure

Over half of residents agreed that tourism improves local investment and infrastructure in their local area, with this sentiment being higher amongst residents of Ashford and Canterbury. And for Ashford district in particular, this may be a result of various developments, including the recent expansion at the Ashford designer outlet and the Curious Brewery. But overall, this is a benefit that is recognised by residents, although agreement was lower for those living in the KDAONB. And with 53% also feeling tourism is harmful to natural places, this is perhaps reflective of the importance of balancing development with environmental concerns. And the wider EXPERIENCE project will seek to support investment that benefits tourism and the environment, through sustainable and heritage enhancing developments.



Public Transport

Although the largest proportion of residents felt that tourism increases public transport options, overall sentiment on this was not as strong as other areas. This could be representative of particular destinations not being as well connected as more urban areas, with those living in a city displaying a higher level of agreement. This reinforces recommendations made in the EXPERIENCE Business Needs Report, that highlights transport and connectivity as a priority area for less connected destinations in the county.

And following the impact of the pandemic, residents still felt transport was an area needing improvement. However, those residents that observed an increase in visitors agreed more so that public transport services are improving, perhaps reflecting work to meet demand by providing services and strong connections to facilitate visits. This shows the value tourism can bring to local areas in terms of transport and infrastructure, which not only meets and increases demand but also benefits local communities greatly.





Resident Wellbeing- PRE COVID-19

All in all, resident satisfaction and wellbeing was high, particularly in terms of lifestyle, feeling calm and expressing optimism for the future, alongside a strong sense of pride and ownership of their local area. And of those who perceive their local area to be a tourist destination, they showed an increased sense of pride and satisfaction. And although this sentiment may incorporate other factors, it could be said that tourism activity increases wellbeing within the destination.

Although each type of location displayed a strong sense of agreement, residents living in rural locations and within the Kent Downs AONB exhibited a higher level of agreement that their area is calm and peaceful, and 'beautiful', compared to overall results. Nearly all (95%) of those in The KDAONB agreed to some level that their local area is tranquil, peaceful and calm, versus 69% among all respondents. This finding demonstrates that the countryside could contribute towards increasing residents' sense of content and wellbeing, alongside recognition of Kent's quality countryside offering as The Garden of England. And while some locations were not perceived to be as 'beautiful', each destination has its own sense of place and individual offering. But overall, these findings support the emotional benefits tourism can have on local communities and the identity and appeal of a destination.

POST COVID-19

Findings show that during summer 2020 and following the COVID-19 pandemic, overall residents felt more strongly connected to their local area, and in particular those who perceive their main attraction to be the countryside, alongside those living in Dover, Sevenoaks and Tonbridge and Malling. This demonstrates again the possible impact of the countryside on wellbeing and overall emotional connection to their local area. With Dover, Sevenoaks and Tonbridge and Malling having a strong countryside offering, with West Kent's rural landscape and The White Cliffs County and links to the Kent Downs and North Downs Way in Dover. Residents' stronger connection may also be representative of the increased time spent in their local area and their engagement with local facilities and outdoor spaces. Overall, residents also felt that their local area was more peaceful and calmer due to the impact of the pandemic, most likely due to many areas seeing a decrease in visitor numbers. In addition, results show that residents felt an increased sense of safety and security living in their local area, again perhaps facilitated by the increased time spent at home compared to a typical summer and the familiarity that comes with this.

However, results did show that residents' overall quality of life decreased due to the impact of the pandemic, resulting in less availability and participation with local attractions and facilities in many areas, which consequently may have had a negative social impact on local residents.



Change in Visitor Numbers

The largest proportion of residents observed a decrease in visitor numbers over the summer, reflecting the overall impact of the pandemic, with many opting to stay at home as consumer confidence was low and uncertainty high. And consequently, areas that saw a decrease in visitor footfall were more likely to have seen a decrease in participation with local facilities and attractions. However, as restrictions begin to ease and destinations begin to welcome visitors back, having new bookable experiences will not only bring more income and business to the local area, but activities will also benefit local residents and create access to more experiences.

However, although not as high, a significant proportion of residents did observe an increase in visitors over the summer. This was observed more so in rural areas and villages compared to overall results, perhaps due to visitors seeking out areas with more open natural spaces such as countryside walks and beaches. This was also the case for those who perceived their local area's main attraction as the coast/beach, alongside residents from Thanet, Canterbury and Folkestone and Hythe, all of which are major Kent coastal destinations. Overall, these findings support national research around visitors' desire to visit more open and rural places following the pandemic, due to these being perceived as less crowded and have a larger outdoor activity offering. Looking to the future, consideration may need to be given to ensure certain destinations and beach locations are not overcrowded and that there is a balance between developing the outdoor experiential offering and minimising any adverse impacts.

Key Impacts & Resident Support of Tourism

Overall, results indicate that residents have a strong sense of support for summer tourism in their local area and that the overall impact on their local area is positive. A strong perception amongst residents in terms of positive impacts of tourism, is the contribution and support it brings to local businesses, through promoting the area and driving interest and allowing visitors to enjoy and discover local sites. Residents also perceive tourism to play a key role in the development and availability of events, quality beaches, the food and drink offering and the preservation of historical sites.

This support is vital in ensuring tourism's development and continuity and results have shown that there is certainly a perception among residents that it can bring many economic, social and wellbeing benefits, which indicates that additional activity particularly through EXPERIENCE will build upon this and ensure activity aligns with the needs of communities.



Negative Impacts

When looking at the negative impacts of tourism, residents commonly mentioned the ongoing issue of pollution, litter on beaches and overcrowding and that in some areas there is competition for resources between tourists and local residents. Through the project, attention will be given to monitoring the environmental impact and other sustainable practices, such as promoting the use of public transport and visitor dispersal through off-season tourism.

And through the development of experiential activities off-season, residents can also enjoy these alongside visitors, and that this may also ease pressure and damage to more popular sites, if that be heritage or natural spaces such as the coast or countryside and nationally protected landscapes such as the Kent Downs AONB



Tracking Progression & Trends

As mentioned previously, there are certain areas that emerged from the survey that should be monitored, in order to establish any trends over time. This includes harm to the natural environment, availability of public transport services and the contribution to the economy and job opportunities post-COVID. And by monitoring these areas over a series of surveys, any changes and progression can be tracked over both the peak winter and summer seasons, which will also allow for any differences to be identified and the overall positivity towards tourism in the county to be monitored. But overall, findings show that residents have a really positive perception of tourism activity that should be maintained and strengthened further.



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This research report has been produced by



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

