

England's  
**CREATIVE  
COAST**



England's Creative Coast

Art Homes Research

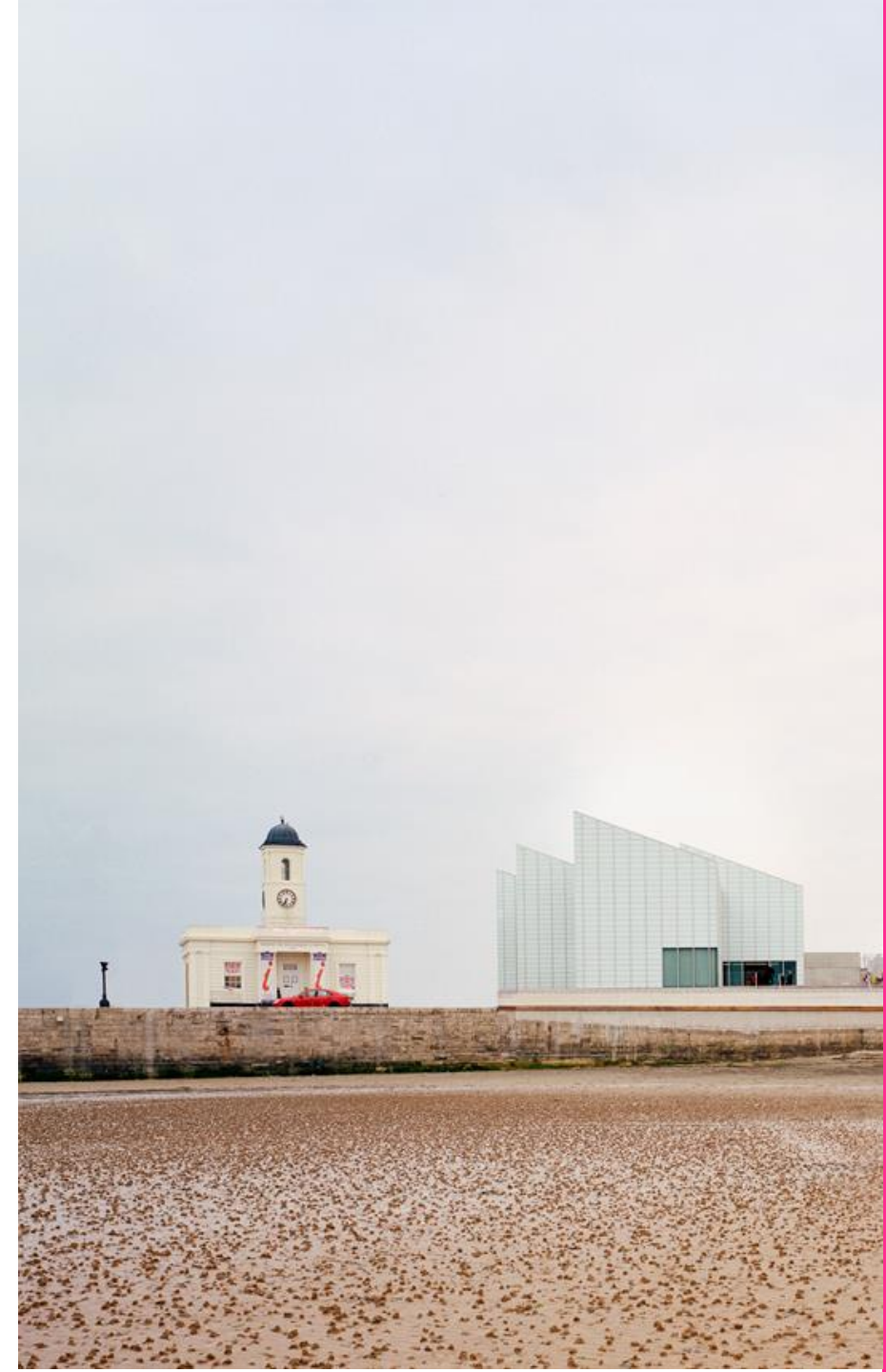


Turner  
Contemporary



# Contents

1. Background	Pg. 03
2. Establishing the audiences	Pg. 06
3. Visitor Research	Pg. 15
4. Host Research	Pg. 30
5. Summary	Pg. 44
6. Recommendations	Pg. 46
7. Next Steps	Pg. 47



# 1. Background

## Art Homes

Art Homes is a one-year pilot programme trialling a new kind of accommodation experience in Kent. Combining the popular trend of homestays with the vibrant cultural scene, Art Homes hopes to give visitors to the area a unique overnight stay, where they can indulge in the creative fabric of the town, and homestay hosts the chance to diversify and enhance your offer.

The pilot is led by Visit Kent and Turner Contemporary as part of England's Creative Coast, a cultural tourism project that aims to increase visitors to the South East coast, funded by Arts Council England and the Discover England Fund. In 2021, seven new outdoor artworks by seven leading contemporary artists and the world's first ever digital geocaching art tour will connect the outstanding galleries and arts organisations around the spectacular coastline across Kent, Essex and Sussex for you to explore.

The project builds on the significant renaissance in the region, driven by arts and culture. Towner Eastbourne, the De La Warr Pavilion in Bexhill-on-Sea, Hastings Contemporary, Creative Folkestone, Turner Contemporary in Margate, Cement Fields in Gravesend and Metal in Southend-on-Sea are joining forces for the first time to create this cultural adventure, which stretches from the South Downs to the Thames Estuary.

# 1. Background

## **The research and how to use this document**

To support the development of the pilot programme, England's Creative Coast commissioned Muse to conduct research that would test the concept of Art Homes. The research provides an insight into the audience perceptions of Art Homes, which has helped to inform the development of the initiative and provide a guidance on the best practice for homestay owners who want to provide an Art Homes experience.

This document lays out the findings in three stages

- Visitor profiling (Section 2)
- Visitor research (Section 3)
- Homestay host research (Section 4)

If you are interested in setting up your own Art Home, then this document should be read in conjunction with the Art Homes toolkit. You'll find the toolkit and more information on how to join the Art Homes pilot here: [www.visitkentbusiness.co.uk/get-involved/englands-creative-coast/art-homes/](http://www.visitkentbusiness.co.uk/get-involved/englands-creative-coast/art-homes/)

## 1.2 Covid-19 Update

Please note that this research was carried out in 2019, prior to the Covid-19 pandemic. Findings and consumer opinions relating to the Art Homes concept are still relevant in the current situation, however this report should also be read along side supplementary reports that can provide up to date data on general consumer sentiment and visitor trends:

- VisitEngland Covid-19 Weekly Consumer Sentiment Tracker – <https://www.visitbritain.org/covid-19-consumer-sentiment-tracker>
- VisitEngland Covid-19 Monthly Profile Reports – <https://www.visitbritain.org/covid-19-consumer-sentiment-tracker>
- VisitBritain Domestic & Inbound Tourism Forecast 2020 – <https://www.visitbritain.org/2020-tourism-forecast>

## 2. Establishing the audiences

- There are two primary audiences for the Art Homes offering, as established by the Discover England Fund International visitor profiles:
- International consumers in France & The Netherlands, as well as UK consumers, who fit within the following consumer categories:
  - Cultural Adventurers (25-39yrs)
  - Outdoor Enthusiasts (35-55yrs)
- The objective of this work is to use Target Group Index (TGI) to size the market and create further topline profiles of the primary audiences

What follows is the topline profiles for each audience segment across the three countries, detailing cultural repertoires, hobbies and media consumption. This information can help you to better understand the target audiences for Art Homes experiences

## 2.1 What is TGI?

- The world's most widely used single source consumer research study, used by the most sophisticated consumer led companies, advertising and media agencies.
- Completed by a minimum of 10,000 participants per country (and far higher in larger markets) with data then being up-weighted to be nationally representative.
- Available quarterly and covers consumer attitudes, habits, motivations and behaviours.
- Highly reliable data: It is very well established and tested. It was introduced in 1969 and is now used in 70 countries.
- TGI provides a unique tool to be able to quickly and accurately segment a consumer base or marketplace into core attitudinal clusters.

# The profiles



GB:  
Cultural Adventurers

2.76m 5.3%

Successful, independently minded young professionals with high disposable incomes. Seeking to soak up all aspects of the local culture in order to escape and unwind whilst experiencing something new. Interested in unique experiences with a touch of luxury.

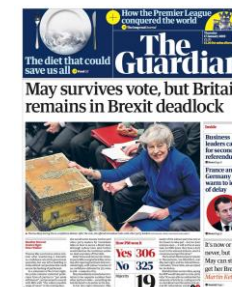
Social class ABC1, aged 25-39. Pre children or parents with young kids. More likely to be living in London and the South East. Working (or studying) full time and well educated with an annual household income of £40,000 +.

#### Statements agreed with ++

- ++ I like taking risks
- ++ I like to be surrounded by different people, cultures, ideas and lifestyles
- ++ I am interested in other cultures
- ++ I like to listen to new bands
- ++ I am interested in the arts
- ++ I like to go to trendy places to eat and drink
- ++ I am passionate about travelling
- ++ I consider myself to be a creative person
- ++ You should seize opportunities in life when they arise

#### Statements disagreed with –

- I buy clothes for comfort, not for style
- There's little I can do to change my life
- I prefer to spend a quiet evening at home than go out





GB:  
Outdoor Enthusiasts

4.43m 8.4%

Nature lovers who love to get close to nature on active breaks with the family. Discovery and learning are an integral part of their holidays, given their keen interest in local heritage and cultures as well as spending time in the great outdoors.

Social Class ABC1 married, empty nesters, aged 35-55. More likely to reside in South East, South West and London. Working full time and well educated with an annual household income of £50,000 +.

#### Statements agreed with ++

- ++ It's worth paying extra for quality goods
- ++ I prefer to be active in my leisure time
- ++ I enjoy spending time with my family
- ++ I prefer to take holidays off the beaten track
- ++ I get a lot of pleasure out of food
- ++ I like to go back to familiar places for holidays
- ++ It is important to continue learning new things throughout your life
- ++ I have a keen sense of adventure
- ++ I am interested in other cultures

#### Statements disagreed with –

- I would feel out of place at the theatre or opera
- There is too much concern with the environment
- I think health foods are only bought by fanatics





## France: Cultural Adventurers

1.2m 2.2%

Successful, independently minded young professionals with high disposable incomes. Seeking to soak up all aspects of the local culture in order to escape and unwind whilst experiencing something new. Interested in unique experiences with a touch of luxury.

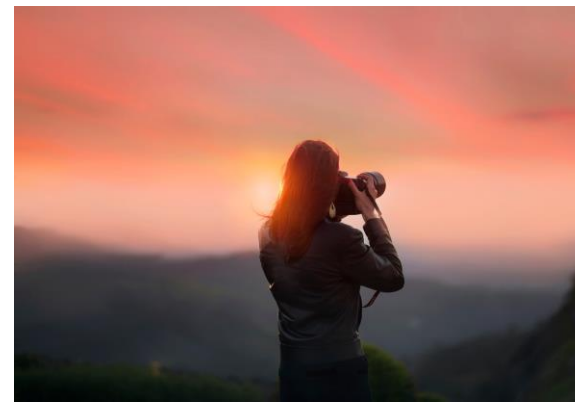
Aged 25-39, Couples and partners, pre-kids as well as parents with young kids. Likely to be in full-time employment and educated to a high level. Middle to high social class, with an anticipated annual income of € 40,000 and above. Most likely to reside in Paris and Marseille.

### Statements agreed with ++

- ++ I like to go to trendy places to eat and drink
- ++ I really enjoy a night out at the pub
- ++ I like to stand out in a crowd
- ++ I like to listen to new bands
- ++ I love to buy new gadgets and appliances
- ++ Newspaper & mag articles on holiday/travel influence holiday choice
- ++ I enjoy splashing out on a meal in a restaurant
- ++ I learn the basics of a language before visiting a country
- ++ I like taking risks

### Statements disagreed with --

- I prefer to spend a quiet evening at home than go out
- I buy clothes for comfort, not for style
- I like to follow a well-organised routine





## France: Outdoor Enthusiasts

2.4m 4.5%

Nature lovers who love to get close to nature on active breaks with the family.

Discovery and learning are an integral part of their holidays, given their keen interest in local heritage and cultures as well as spending time in the great outdoors.

Aged 35-55, families and empty nester couples. Again, likely to be in full-time employment and also educated to a high level. High social class, with an annual income of € 60,000 and above. Most likely to reside in Paris and Lyon.

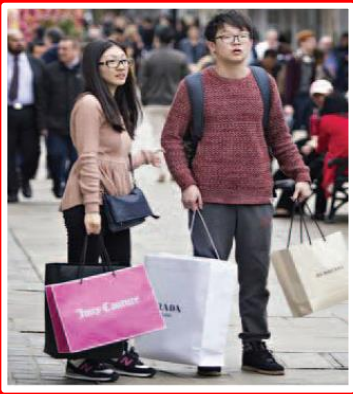
### Statements agreed with ++

- ++ I read the financial pages of my newspaper
- ++ I learn the basics of a language before visiting a country
- ++ I have expensive tastes
- ++ I have a keen sense of adventure
- ++ I prefer to take holidays off the beaten track
- ++ I am interested in other cultures
- ++ I enjoy splashing out on a meal in a restaurant
- ++ I am passionate about travelling
- ++ I am prepared to pay more for products that make life easier

### Statements disagreed with --

- I like to take holidays in my own country rather than abroad
- I prefer to spend a quiet evening at home than go out
- I buy clothes for comfort, not for style





## Netherlands: Cultural Adventurers

850,000 5%

Successful, independently minded young professionals with high disposable incomes. Seeking to soak up all aspects of the local culture in order to escape and unwind whilst experiencing something new. Interested in unique experiences with a touch of luxury.

Aged 25-39, Couples and partners, pre-kids as well as parents with young kids. Likely to be in full-time employment and educated to a high level. Middle to high social class, with an anticipated annual income of € 40,000 and above. Most likely to reside in Noord & Zuid Holland.

## Statements agreed with ++

- ++ I like to travel
- ++ I look for good value for money
- ++ I care about my image
- ++ I see travel as a reward for my hard work
- ++ I like learning about new cultures
- ++ The cultural and historical attributes of a country influence my decision when deciding on holiday destinations
- ++ I consider myself to be a creative person
- ++ I enjoy a night out in the pub





## Netherlands: Outdoor Enthusiasts

884,000 5.2%

Nature lovers who love to get close to nature on active breaks with the family.

Discovery and learning are an integral part of their holidays, given their keen interest in local heritage and cultures as well as spending time in the great outdoors.

Aged 35-55, families and empty nester couples. Also, likely to be in full-time employment and also educated to a high level. High social class, with an annual income of € 60,000 and above. Also likely to reside in Noord & Zuid Holland.

## Statements agreed with ++

- ++ I like to travel
- ++ I learn the basics of a language before visiting a country
- ++ I buy new products before most of my friends
- ++ I have a keen sense of adventure
- ++ I like learning about new cultures
- ++ The cultural and historical attributes of a country influence my decision when deciding on holiday destinations
- ++ I enjoy dining out and visiting pubs
- ++ I enjoy walking in the countryside



# 3. Visitor Research

12 depth interviews were carried out amongst the target segments

	France	Netherlands	UK
Outdoor Enthusiasts	2 depth interviews	2 depth interviews	2 depth interviews
Cultural Adventurers	2 depth interviews	2 depth interviews	2 depth interviews

At the top of each page, you'll see the following icons which indicate which audiences, Cultural Explorers and Outdoor Enthusiasts, the findings or comments relate to.



# Visitor Research Findings

- What are they interested in?
- What are their perceptions?
- Thoughts on the Art Homes concept
- What are they searching?



# Visitors – What are they interested in?

## Leisure repertoires reflect segment DNA...

- ‘Cultural Adventurers’ tend to visit galleries and ‘aesthetic’ museums
- Younger Contemporary are drawn to the zeitgeist, the modern and social issues that ‘speak to them’
- ‘Outdoor Enthusiasts’ are seeking variety and still experiment across the visual arts
- Overseas respondents display a curiosity about the world and desire for personal enrichment when they travel abroad

I’m looking for something  
relevant and original

I still like to explore –  
with and without the kids

# Visitors – What are they interested in?

## Art and culture is often naturally sought out on a leisure trip...

- But so many factors are at play, and it depends on the nature of the trip:
  - Length of and type of trip (city break or beach holiday?) motivations for the trip generally, destination, party composition and so on
- Many respondents actually claim to be “more cultural” when they’re abroad rather than when they’re at home
- The key thing to note is that these audiences are very much open to arts and culture when they are travelling both abroad and domestically

It depends on why I’m travelling, but I’m always on the look out

# Visitors – What are they interested in?

## They do take dedicated trips with an arts & culture focus...

- The UK has a very highly regarded visual arts scene amongst international cultural consumers
- Respondents across all groups talked about travelling to different parts of the country and abroad to see specific exhibitions:
  - Bristol for Banksy, Tate Liverpool for Keith Haring, Belfast for Titanic in the UK
- Often a component of a city break also including general sight seeing (which often naturally comprises the iconic art), food, relaxing, spas, nature etc.

# Visitors – What are their perceptions?

## Perceptions of Kent & South East are somewhat varied...

- The Kent coast is understood to be rugged but improving
- UK perceptions of the Kent coast are uniformly positive and many have had great diverse experiences at places such as Margate, Folkestone, Broadstairs and Whitstable consistently in recent years
- The 'informal' culture scene is a big part of the appeal of the UK for overseas visitors
- Established creative/visual arts scene
- Strong food & drink offering

# Visitors – What are their perceptions?

## Homestays are valued but considered conventional nowadays...

- Airbnb considered as once exciting disruptor brand that is now just another holiday accommodation provider, but can still be a great way of getting away
- It can be a chore to find interesting places to stay that have character and distinction
- Recent press around the damage to city centres/locals is something they don't want to contribute to
- Some have had poor experiences where the accommodation was not really as listed

They used to be quite novel, but it's part of the everyday now

# Visitors – The Art Homes Concept

## **The Art Homes concept has appeal and is welcomed...**

- It represents a great idea that can deliver on a number of levels:
  - Find unusual, creative and distinct places to stay by curating and classifying a body of homestay providers
  - Making homestay properties more appealing by helping them to deliver interesting art/cultural/thematic experiences
  - A form of quality control
- The concept is fairly well understood and considered to have an impactful and engaging brand name
- The idea of experiences/events that they can either pay extra for or come as part of the package has appeal for all

# Visitors – The Art Homes Concept

**It's a great  
idea in it's  
own right**

**It's actually quite  
useful as a way of  
filtering out all the  
generic Airbnb stuff**

# Visitors – The Art Homes Concept

## Overseas audiences will travel for Art Homes...

- The concept has enough allure and intrigue to prompt visitors from both The Netherlands and France to consider booking
- A website and the quality control (either formal or by proxy) adds to the confidence in booking
- An Art Homes stay could constitute a holiday in its own right or comprise part of a longer trip to the UK

# Visitors – The Art Homes Concept

## Role of the host...



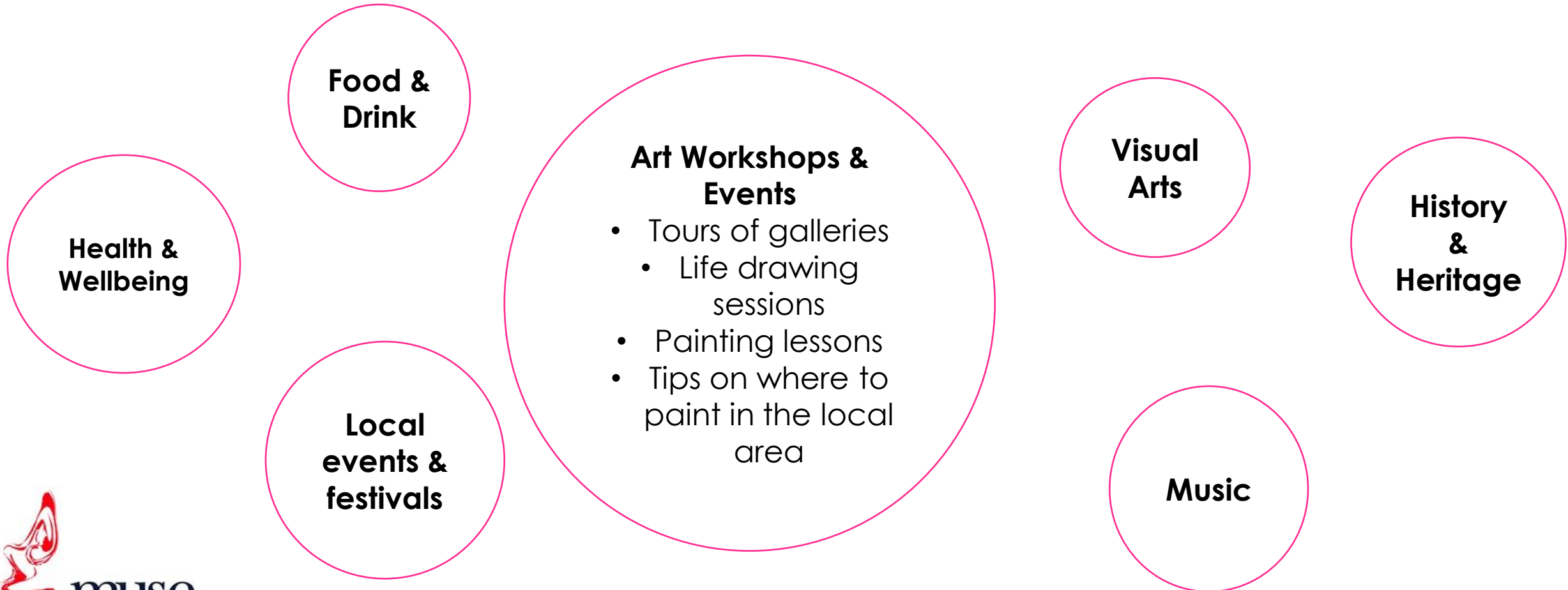
- Interaction with an interesting, charismatic, creative person
- Opportunity to immerse themselves in their art world



- Interesting space is more than enough
- They like to be left alone to enjoy their break

# Visitors – The Art Homes Concept

**The experiential events should add distinction to the concept**



# Visitors – The Art Homes Concept

## The majority would pay a 25% premium for a curated, experiential homestay...

- How much they would pay for an Art Homes experience depends on a number of factors:
  - Location, visiting party, distance travelled, duration, occasion, programme, space and so on
- But all agreed that for a distinct, unusual, well designed space with well curated experiences, they would pay more

**Cost**  
**25%**  
premium  
on value

**Duration**  
**UK Visitors:**  
2/3 night  
stay

**Duration**  
**Overseas**  
**Visitors:**  
3 nights +

# Visitors – The Art Homes Concept

## **The quality assurance it offers is a bonus...**

- Airbnb works as a quality safety net in and of itself
- Formal quality insurance is much more important for overseas visitors spending more money and time travelling as it provides reassurance beyond any Airbnb promise
- It's felt that the Art Homes could develop as a proxy badge of quality and assurance over time

# Visitors – Where are they searching?

## Online is key for discovering this type of experience...

- Visitors respondents told us that positive word-of-mouth recommendations was very important when choosing where to stay. Interestingly, hosts also recognised that this was crucial.
- Visitors said that they would use Google and AirBnB to search for their accommodation. As well as looking on Facebook and Instagram. Overseas visitors were most likely to work with a special travel agent to help them find and book their trip.
- Publications such as Wallpaper, Conde Nast Traveller, Living Etc were listed as potential sources of inspiration also.



Condé Nast  
**Traveler**



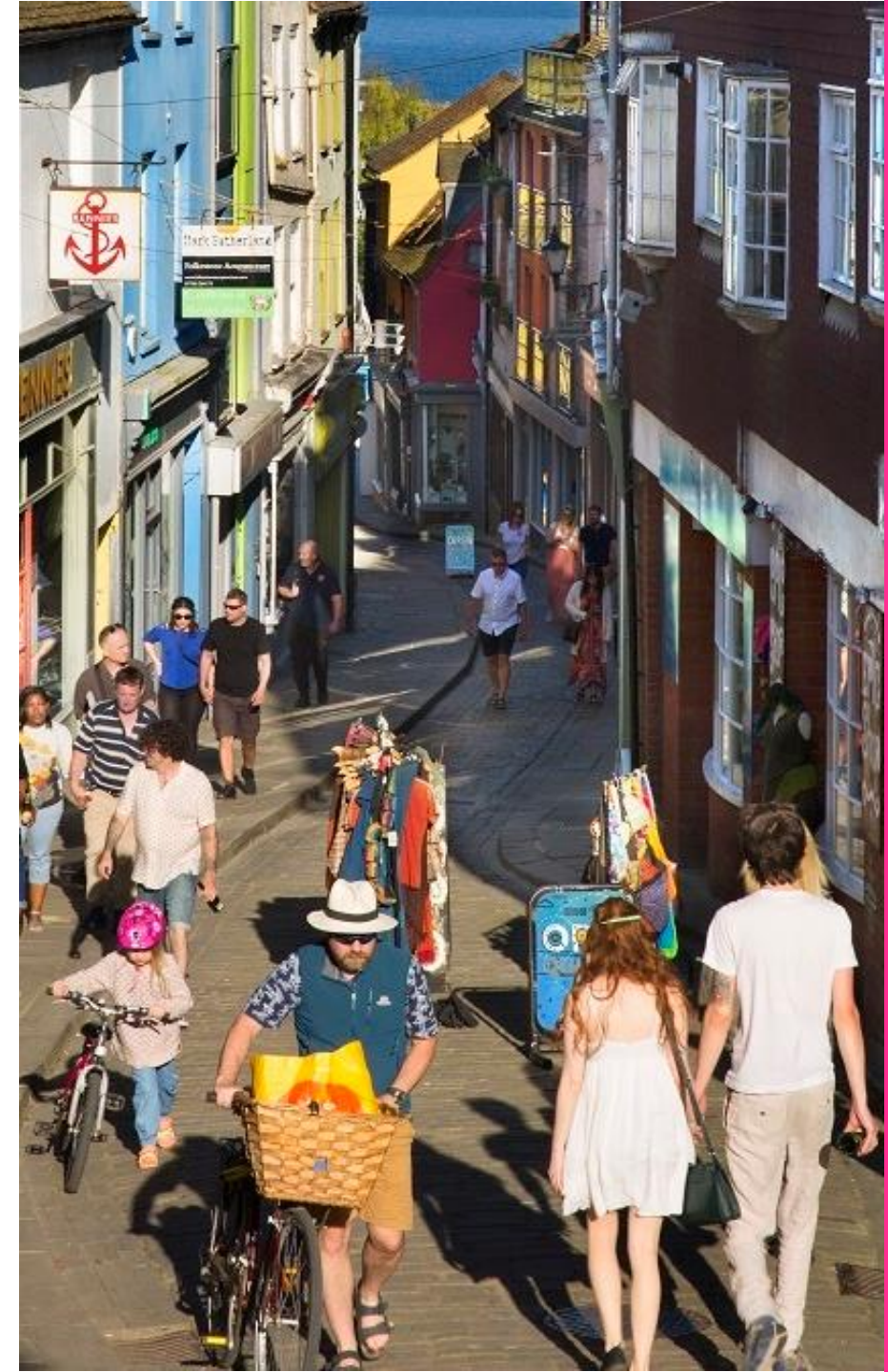
# 4. Host Research

- 1 focus group (8 respondents) amongst current homestay providers with artistic background/connections
- 3 depth interviews amongst prospective homestay providers with artistic backgrounds/connections

At the top of each page, you'll see the following icons which indicate which respondent category the findings and comments relate to – Current homestay providers and Future/potential homestay providers

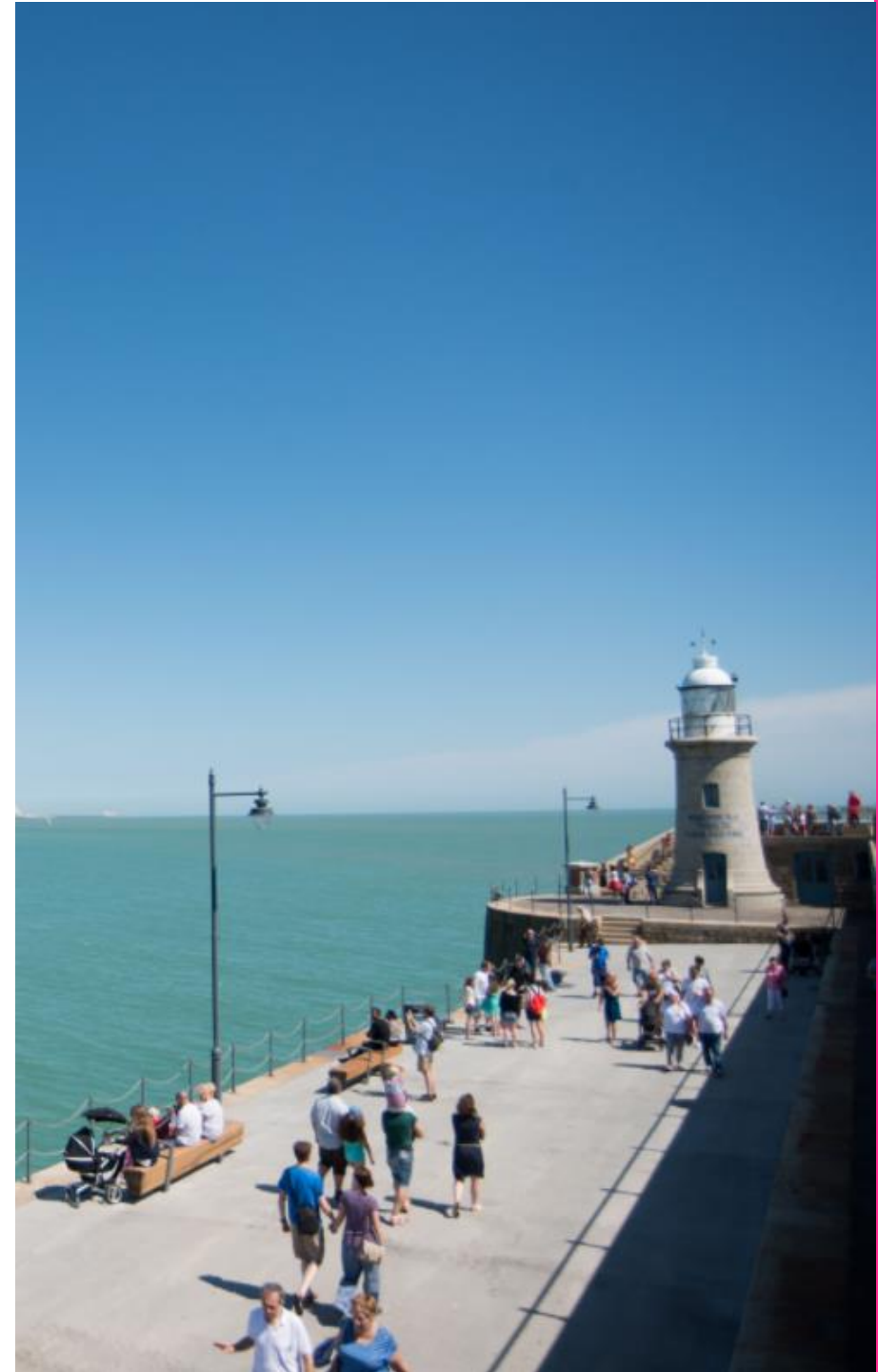
Current

Future



# Host Research Findings

- What do they offer?
- Thoughts on hosting
- The importance of their destination
- The channels of promotion they use
- Thoughts on accreditation
- Thoughts on the Art Homes concept



# Hosts – What do they offer?

## A variety of capacities and configurations...

- From flats and houses to home-lets sleeping up to 16
- From the everyday dwellings to the quirky conversions
- Many hosts also have other plans to expand their physical capacity – outbuildings and the family home itself
- For some, their properties are permanently available to let, others go on holiday when they let out the family home

# Hosts – What do they offer?

**Many are already providing thematic & curated offerings including...**

**Art**

**Cycling**

**Music**

**Yoga**

**Work-away  
trips**

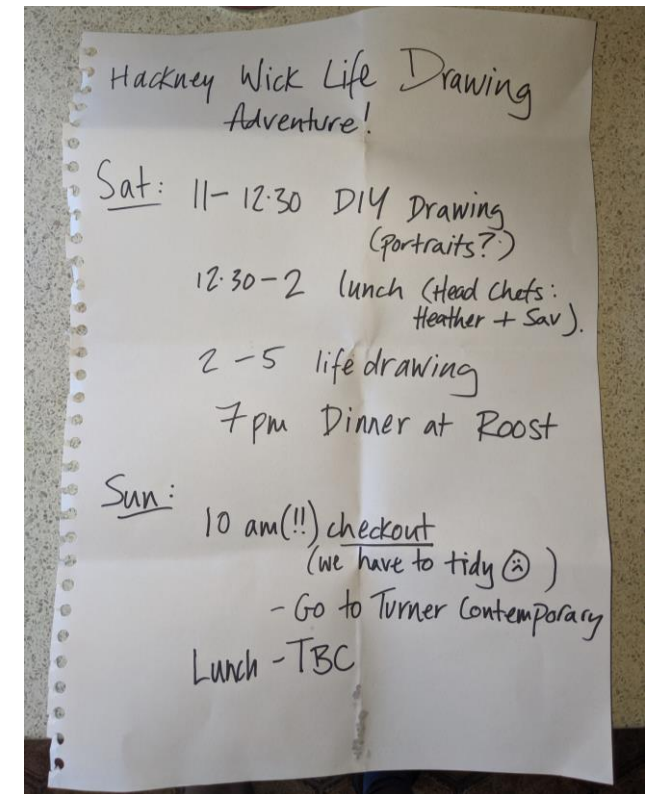
# Hosts – What do they offer?

**Many are already providing thematic & curated offerings...**

Margate has a thriving food scene as well so gastronomic experiences would work

I would want to be able to provide my visitors with amazing unique experiences

We have a life drawing class this weekend



# Hosts – Thoughts on hosting

## Initial apprehensions around visitors looking after their property...

- Host worry about guests being economical with the truth when booking: Expensive and complicated to rectify
- Also worry about receiving bad reviews, which impacts upon reputation and future bookings
  - Hosts know they need to be clear about the property/experience offered in order manage visitor expectations. This is a particularly important point if a property describes themselves as an Art Home
- All like to meet guests on arrival/departure: builds trust, can gather feedback directly, rather than on Airbnb
  - For those with additional/complimentary businesses (e.g. art galleries, shops, yoga classes etc) it helps to encourage cross sell – additional spend/interaction
- Prospective Homestay hosts are somewhat apprehensive about all of the above!

# Hosts – Thoughts on hosting

## It's hard work but satisfying...

- All agree it has been a lot more work than they had expected
- It becomes a full-time job and they are on-call at all times when someone is staying in their property - can be difficult for those with other 'nine to fives'
- It is extremely satisfying – getting good reviews and seeing return visitors - receiving personal feedback and knowing guests have enjoyed their stays

In the summer, it's  
a full-time job!

# Hosts – Who are they hosting?

## Current Visitors

- Foreign students & teachers
- Groups of friends looking to enjoy the local area
- Hip, young people visiting from London
- Guests with outdoor/active interests – cycling and fishing trips
- Family groups celebrating special occasions

## Target Visitors

- People looking for unique experiences
- Those working in the creative industries
- Mixed gender friendship groups
- Thematic parties – arts, wellbeing, gastronomy
- International groups for special events – The 149<sup>th</sup> Open at Royal St George's

# Hosts – Their destination

## The region is a brand...

- All those with properties in Margate agreed that the 'Margate brand' was hugely important to the success of their business
- ..and had been influential in their decision to set up a homestay property in the first place
  - Attractions from Turner Contemporary, Dreamland, the burgeoning art community, and even people moving from London contribute to the allure of the homestay
- Wherever the homestay, the region needs to be leveraged as a brand in any (credible) possible way, so that it adds to the reasons to visit/book
- Important to understand the community and know what is suitable for recommending

# Hosts – Channels of promotion

**Social media and homestay platforms are key...**



Sleeps12.com



A Source of Inspiration



cottages.com

# Hosts – Thoughts on accreditation

## Is it necessary for business success...

- All had chosen **not** to go with an accreditation for their properties as they didn't feel that they were necessary when listed on Airbnb
- They found that customer reviews were enough to make customers feel reassured of the standard of offering
  - They felt that accreditations were too restrictive and not representative of their properties
  - The rosette is for traditional B&Bs
- They did however feel that an art specific accreditation would be useful to help define themselves in the ever-growing Airbnb market
  - They felt that Airbnb didn't offer enough to help them distinguish their unique properties from the others

**My agent would be my quality assurance**

**Art Homes should be like the kite mark for people who want a quality creative homestay**

# Hosts – The Art Homes Concept

## There is widespread support for the Art Homes concept...

- It's simply seen as a way of marketing their offering and helping them stand out in a cluttered market
  - It's felt that the homestay category has grown and become diluted with generalist and poor quality offerings
- An opportunity to provide curated activities for visitors
- It's felt that this particular concept offers ample opportunity to develop successful, unique and rewarding experiences for the visitor

Airbnb was once cool, but  
it's now just another  
platform and others do it  
better

# Hosts – The Art Homes Concept

## Practical support & guidance is needed...

- How to make their offering more distinct, differentiated and appealing in reality
- Help connecting with local artists & businesses
- Practical advice on topics such as insurance

# Hosts – The Art Homes Concept

## Learnings from those already working with local artists...

- Artists question why they should allow someone to display their art for free.
- For some artists, there is a concern with issues of insurance and damage when displaying their artwork.
- The art the host chooses to display must fit the right vibe/feel of the house - and host/guest taste is personal
- Working with a curator is too expensive as they would charge for their service
- The host must have the right space to display the right kind of art

# 5. Summary

- There are good absolute numbers for each of the target audiences, both at home and abroad, indicating a robust target audience for the Art Homes product
- The target audiences consider the Art Homes concept appealing, motivating and distinctive and both current and potential providers welcome the initiative
- It's seen as a way of positioning (providers) and finding (users) unique, distinct and creative homestay experiences in a crowded and somewhat generic category
  - Helping visitors find unusual, creative and distinct places to stay by curating and classifying a body of homestay providers
  - Making homestay properties more appealing by helping them to deliver interesting art/cultural/thematic experiences
  - A form of quality control

# Summary contd...

- Homestay hosts require support in developing experiences, programming and marketing
- And hosts, particularly those with space, are keen to implement those experiential events to complement their offering
- The presence and role of the host is also key to the success of the concept for many visitors

## 6. Recommendations for homestay hosts

- Manage expectations of the offering – don't oversell and be clear about the Art Homes experience you offer
- Develop experiences around wellbeing and food/drink as well as creativity and arts
- Develop a social media presence showcasing your Art Homes offer
- Tap into the local area – both in terms of it being a brand, but also for networking

## 7. Next Steps

Following this research, a toolkit has been created to assist homestay and prospective homestay operators to develop their business successfully and help them to become an Art Home by achieving the Great4 Art Homes accolade. Along side this, a year-long pilot will be in place from Spring 2021 – Spring 2022 testing the Art Homes concept.

In light of the Covid-19 pandemic, businesses need to adapt existing products, create new revenue streams, and collaborate to reach new audiences to help their recovery and drive business growth. Connecting to the area's cultural offer can unlock new business. Research shows that cultural tourists stay longer than leisure tourists (Culture Kent project research, 2017) and with the growing trend for everyone to become their own travel agent and to have an authentic experience, Art Homes offers something new and exciting to the market.

If you'd like to develop your own Art Home, then you can download the toolkit and find more information on joining the Art Homes pilot here: [www.visitkentbusiness.co.uk/get-involved/englands-creative-coast/art-homes/](http://www.visitkentbusiness.co.uk/get-involved/englands-creative-coast/art-homes/)