



Kent Perceptions Research - Country Summaries

March 2022

Spain

Germany

France

USA



Spain

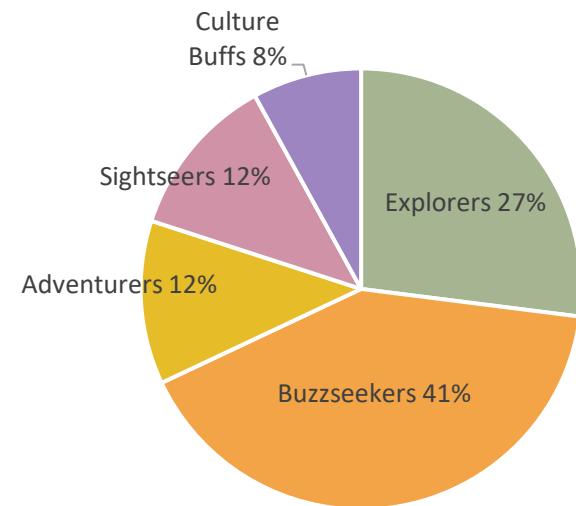
The Research Programme

Online survey among people who have visited Kent previously and/or will visit in future.

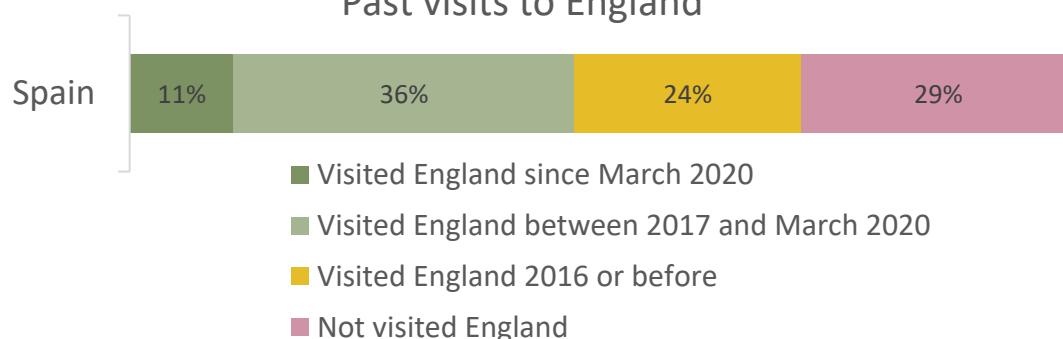
Country	Interviews	Timing
Britain	2001	August
US	750	
France	748	December
Spain	750	2021
Germany	671	

Some COVID travel restrictions, testing and quarantine rules were still in place at the time of the research.

Age	Spanish Survey Respondents
Under 35 yrs	32%
35-54 yrs	45%
55+ yrs	23%
Male	49%
Female	50%



Past visits to England





Spain

Profile

- 42% of past visitors from Spain only visited London, so have limited knowledge of regional England
- Barriers to visiting England in the future include a ‘lack of reasons to visit England’ and a ‘greater appeal of other places’
- **Price sensitivity** is a recurring theme among people in Spain, with cheaper alternatives being a reason to not visit for 17% of those not planning to visit England
- **57%** of people have heard of, but know nothing about Kent
- There are **mixed views of past experiences** in Kent, with 1 in 4 scoring 9 or 10 out of 10, but another 1 in 4 scoring 6 or less. This is reflected in only 1 in 4 definitely willing to recommend Kent to others
- Visitors from Spain are most likely to have taken **short breaks** (1-3 nights) in Kent, though future consideration suggests a **willingness to stay longer**, with 61% saying they might stay for 4 – 7 nights. The main trigger to staying longer is access to a **good deal**
- At the time of the research, people in Spain had significant concerns about **Covid** that led 41% to say they will take more holidays ‘at home’ with 28% expecting the changes to their holiday habits to be long term. However, the situation is changing rapidly still and as restrictions and risks diminish, a wider return to international travel is expected
- **Sustainability** is typically ‘**quite**’ rather than ‘**very**’ important in holiday choices for Spanish people. Areas of most importance are unpolluted beaches and green spaces, and actions to protect the natural landscape
- **Brexit** is causing concern for potential visitors from Spain with **64%** concerned about **difficulties at border control**



Spain

Research & Booking

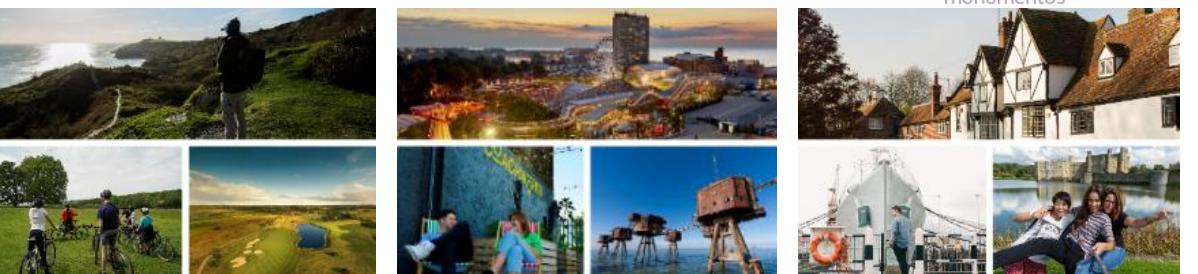
- Online channels are the main information sources when planning a trip to Kent. **Guidebooks and leaflets** are also an important source of information before and during a visit
- **Special offers/discounts** are the most important influencer on the decision to visit Kent, along with desire **to explore** the area
- **Half** of visitors from Spain would book a holiday package and **36%** of visitors from Spain would book independently direct with accommodation and attraction providers
- Top reasons to visit Kent are:
 - **Countryside and natural beauty**
 - **A variety of places to visit**
 - **Sampling the local food and drink**
 - **Cultural attractions (historic buildings, famous sights)**

Spain – sources of information

1. General online search
2. Visit review websites
3. Visit a Kent destination website
4. Visit the specific attractions websites
5. Ask friends and family for recommendations

Perceptions of Kent

- Most appealing imagery reflects the broad interests for visitors from Spain, including both the outdoor landscape and history/heritage, but also the exciting and unexpected, reflecting the high proportion of Buzzseekers in Spain
- These themes are reflected in the positive spontaneous associations with Kent around the beauty, scenery, and history and culture



gastronomy
nature
culture
beautiful
Scenery
history
fun
green
cold
tranquillity
English
castillos
paisaje
tranquilo
naturaleza
bonito
cultura
verde
historia
divertido
ocio
agradable
interesante
monumentos



Spain

Immersive Experiences

- Interest in activities and experiences is generally high in Spain, supported by their interest in staying in the area for either a short or medium break (1-7 nights)
- Activities of most interest are a mix of active outdoor experiences, recognisable tours and heritage-related. Many of these experiences would tie in well with organised coach tours and for those travelling by car. Public transport proximity will increase accessibility of experiences to a wider audience from Spain

Top 10 Experiences

- Nordic walking
- Brewery tour
- Photography tour
- Heritage arts tours
- Wildlife reserve experience
- Guided hikes and walks
- Vineyard tour and tasting
- River tours
- Cider farm tour and tasting
- Sustainable rural retreat

Transport

- Coach tours provide an opportunity for visitors from Spain, with 11% intending to join an organised coach tour to travel around Kent. Those who travel alone or as a couple, the over 55's and more affluent people are most likely to be interested in coach tours.
- Public transport is also important for visitors from Spain, with 17% using buses and 13% intending to travel around Kent by train. Making public transport simple and accessible is therefore important to encourage and enable visitors from Spain

Accommodation

- The type and quality of accommodation available is **very important** in choosing Kent as a holiday destination for **41%** of visitors from Spain (and **quite important** for a **further 49%**)
- **One in five** people think the quality of accommodation options in Kent is **excellent**, with 31% saying it is very good
- **For 75%** of visitors from Spain, the accommodation either **makes the holiday or has significant influence**, further highlighting the need for greater accommodation choices
- **Mid-range hotels** are most popular (**38%**), followed by high-end (20%) and budget (11%). There is **growing interest in rented accommodation** (apartment/cottage) and Airbnb, reflecting the overall growth being seen in this sector, accelerated by the Covid pandemic that increased the appeal, at least temporarily of self-contained accommodation



Germany

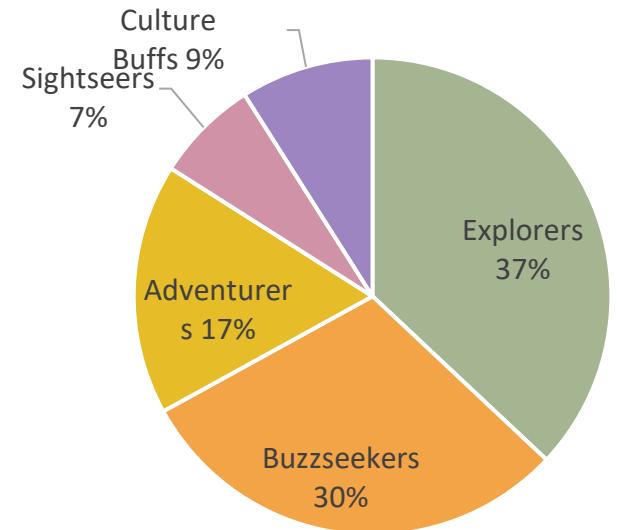
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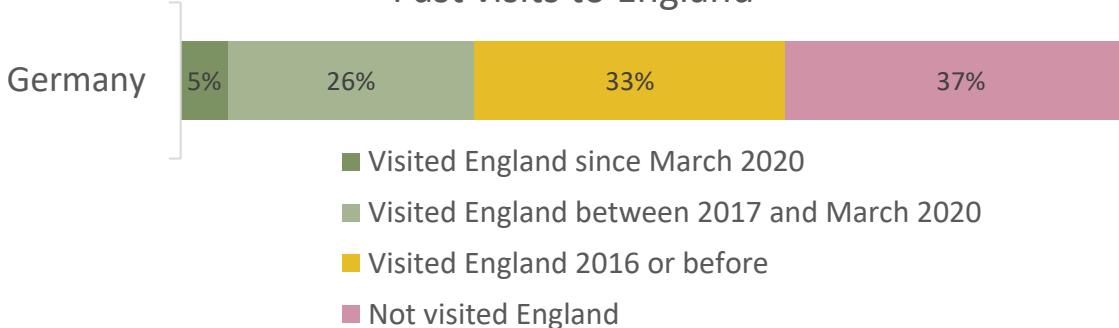
Country	Interviews	Timing
Britain	2001	August
US	750	
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Some COVID travel restrictions, testing and quarantine rules were still in place at the time of the research.

Age	German Survey Respondents
Under 35 yrs	26%
35-54 yrs	39%
55+ yrs	34%
Male	47%
Female	53%



Past visits to England





Germany

Profile

- 43% of past visitors from Germany only visited London, so have limited knowledge of regional England
- Barriers to visiting England in the future include a ‘lack of reasons to visit England’ and a ‘greater appeal of other places’. Distance is a barrier for 9% of people in Germany
- 56% of people in Germany have heard of, but know nothing about Kent
- There are **mixed views of past experiences** in Kent, with a third scoring 9 or 10 out of 10, but another third scoring 6 or less. This is reflected in only 1 in 5 definitely willing to recommend Kent to others
- Visitors from Germany are most likely to have taken **short breaks** (1-3 nights) in Kent (44%), though future consideration suggests a **willingness to stay longer**, with 51% saying they might stay for 4 – 7 nights. The main trigger to staying longer is access to a **good deal**, with a **specific vacation experience** as the second most likely trigger
- At the time of the research, people in Germany still had concerns about **Covid**, leading to 36% to say they will take more holidays ‘at home’, with 21% expecting the changes to their holiday habits to be long term. However, the situation is changing rapidly still and as restrictions and risks diminish, a wider return to international travel is expected. People in Germany are the least likely of all countries to have concerns around Covid-safe measures or to be worried about other people’s behaviour
- **Sustainability** is typically ‘quite’ rather than ‘very’ important in holiday choices for German people. Areas of most importance are unpolluted beaches and green spaces, actions to protect the natural landscape and controls on visitor numbers to protect specific areas
- **Brexit** is causing concern for potential visitors from Germany with 51% concerned about **difficulties at border control**



Germany

Research & Booking

- Online channels are the main information sources when planning a trip to Kent. **Guidebooks and leaflets** are also an important source of information before and during a visit
- **A desire to explore** is the main decision influencer for people from Germany. Suitable accommodation and a variety of activities and experiences are also important
- **48%** of visitors from Germany would book a holiday package and **39%** would book independently direct with accommodation and attraction providers
- Top reasons to visit Kent are:
 - **Countryside and natural beauty**
 - **Beaches and seaside**
 - **Cultural attractions (historic buildings, famous sights)**
 - **Never been before and want to go there**

Germany – sources of information

1. General online search
2. Visit a Kent destination website
3. Visit review websites
4. Use a travel guidebook
5. Look through destination brochures and leaflets

Perceptions of Kent

- People in Germany respond most positively to the Active & Outdoors imagery. They are not generally attracted by images of wellbeing, reflected in the low appeal of wellbeing-related experiences
- The spontaneous associations with Kent are generally around the natural environment and the beauty of the area



seeing castle Relaxation
recreation unknown Castles worth adventure
people traditional Culture
historical British
england cool People fun
none water new green
white nice kent
gardens good coast
museum buildings old
Attractions Outlets sea rural
great idea cathedral weather
friendly Canterbury English freedom

nichts interessant essen sehenswert
freundlich erleben cool wetter
erholung gegen unbekannt
leute grün sehenswerte
stadt wasser englisch Küste schloss
spaß ruhe unbekannt
fremde meer kultur
schöne dover englisch
ahnung autonome kathedrale
Keine Weißes kathedralen
weißen kathedralen
grafschaft regen historisch
menschen Menschen
sehenswürdigkeiten



Germany

Immersive Experiences

- Interest in activities and experiences is notably lower in Germany than in all other countries (domestic and inbound). This generally lower level of interest was also seen in the VisitEngland Experiential Activities research
- Activities of most interest are those that perhaps sound less structured, allowing the visitor to make the experience more personalised. The various drink related experiences (beer, cider, gin) all appeal to the German audience

Top 10 Experiences

- Wildlife reserve experience
- Guided hikes and walks
- Photography tour
- Sustainable rural retreat
- Vineyard tour and tasting
- Brewery tour
- Heritage arts tours
- River tours
- Cider farm tour and tasting
- Gin distillery tour and tasting

Transport

- Most visitors from Germany would expect to arrive by plane, though 1 in 4 would drive to Kent.
- 19% of visitors from Germany would use buses to get around Kent, highlighting the importance of accessibility of destinations and experiences by public transport.
- 8% of Germans would consider cycling around Kent.

Accommodation

- The type and quality of accommodation available is **quite important** in choosing Kent as a holiday destination for **52%** of visitors from Germany (and **very important** for a **further 35%**)
- 13%** of people from Germany think the quality of accommodation options in Kent is **excellent**, with 30% saying it is 'very good'
- For 70%** of visitors from Germany, the accommodation either **makes the holiday or has significant influence**, further highlighting the need for greater accommodation choices
- Mid-range hotels** are most popular (**35%**) for visitors from Germany. There is **growing interest in rented accommodation** (apartment/cottage), reflecting the overall growth being seen in this sector, accelerated by the Covid pandemic that increased the appeal, at least temporarily of self-contained accommodation

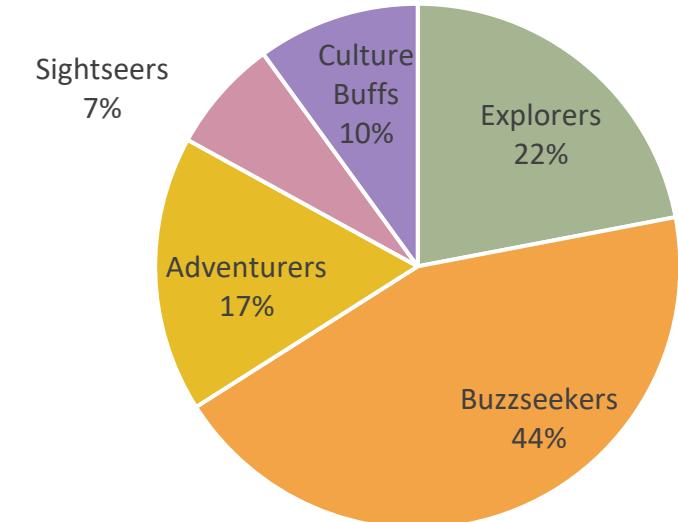
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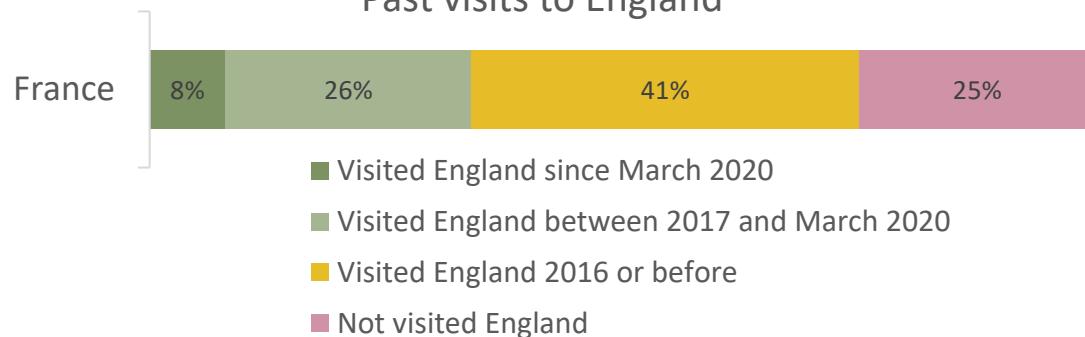
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Britain	2001	August
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Spain	750	
Germany	671	

Some COVID travel restrictions, testing and quarantine rules were still in place at the time of the research.

Age	French Survey Respondents
Under 35 yrs	39%
35-54 yrs	44%
55+ yrs	16%
Male	45%
Female	55%



Past visits to England



Profile

- 48% of past visitors from France only visited London, so have limited knowledge of regional England
- The main barrier to visiting England from France in the future is a 'lack of reasons to visit England'. For a quarter of people there are 'other places they want to go more'
- 52% of people have heard of, but know nothing about Kent
- There are **mixed views of past experiences** in Kent, with only 1 in 4 scoring 9 or 10 out of 10 and 39% scoring 6 or less. This is reflected in only 1 in 5 definitely willing to recommend Kent to others
- Visitors from France are most likely to have taken **short breaks** (1-3 nights) in Kent and a further 28% have taken day trips, potentially 'passing through' on their way to other parts of the country. Future consideration suggests a **willingness to stay longer**, with 58% saying they might stay for 1-3 nights and 61% willing to consider staying 4 – 7 nights. Whilst a **good deal** is the main trigger to staying longer, specific events and **more choice of accommodation** are also noted.
- At the time of the research, people in France had significant concerns about **Covid** that led 40% to say they will take more holidays 'at home' with 19% expecting the changes to their holiday habits to be long term. However, the situation is changing rapidly still and as restrictions and risks diminish, a wider return to international travel is expected
- **Sustainability** is typically '**quite**' rather than '**very**' important in holiday choices for French people. Areas of most importance are broad, including clean, unpolluted beaches, actions to protect the natural landscape and **eco-friendly accommodation**
- **Brexit** is causing concern for potential visitors from France with 54% concerned about **difficulties at border control**, though encouragingly a third say it will have no impact at all.

France

Research & Booking

- Online channels are the main information sources when planning a trip to Kent. Review sites are particularly important for visitors from France. **Guidebooks and leaflets** are also an important source of information before and during a visit
- **Special offers/discounts** are the most important influencer on the decision to visit Kent, along with desire **to explore** the area
- **47%** of visitors from France would book a holiday package and **45%** would book independently direct with accommodation and attraction providers
- Top reasons to visit Kent are:
 - **Countryside and natural beauty**
 - **A variety of places to visit**
 - **Beaches and seaside**
 - **Value for money/cost of staying there**

France – sources of information

1. General online search
2. Visit review websites
3. Use a travel guidebook
4. Visit a Kent destination website
5. Look through destination brochures and leaflets

Perceptions of Kent

- Most appealing imagery for visitors from France centres on the outdoors, including both the outdoor landscape and the exciting or unexpected. The more relaxed imagery around food and drink experiences also appeals
- These themes are reflected in the positive spontaneous associations with Kent that centre on the beauty of the countryside



Immersive Experiences

- Interest in activities and experiences is generally high in France, supported by their interest in staying in the area for either a short or medium break (1-7 nights)
- Activities of most interest are those that would provide an insight into the area. The photography tour is of most interest, followed by the brewery tour. Ensuring experiences are unique to Kent rather than England more generally will help to attract the French audience

Top 10 Experiences

- Photography tour
- Brewery tour
- Heritage arts tours
- Wildlife reserve experience
- Guided hikes and walks
- Nordic walking
- Sustainable rural retreat
- Foraging and wild food experience
- Vineyard tour and tasting
- River tours

Transport

- 22% of visitors from France would come by train and similar proportions by plane or car.
- Transport around Kent is a mix of car (35%), train (13%) and bus (13%)

Accommodation

- The type and quality of accommodation available is **very important** in choosing Kent as a holiday destination for **40%** of visitors from France (and **quite important** for a further **51%**)
- **16%** of visitors from France think the quality of accommodation options in Kent is **excellent**, with 30% saying it is 'very good'
- For **74%** of visitors from France the accommodation either **makes the holiday or has significant influence**, further highlighting the need for high quality accommodation choices
- Overall **mid-range hotels** are most popular (**27%**). However, visitors from France consider a wide range of accommodation, with 14% opting for B&B/guesthouses, 11% for Airbnb or similar, and 9% for rented apartments or cottages



USA

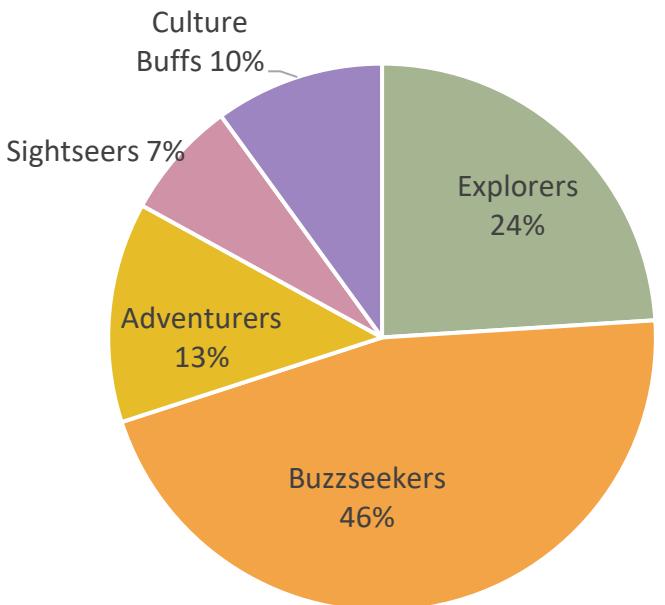
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Age	US Survey Respondents
Under 35 yrs	34%
35-54 yrs	43%
55+ yrs	22%
Male	51%
Female	49%



Past visits to England



- Visited England since March 2020
- Visited England between 2017 and March 2020
- Visited England 2016 or before
- Not visited England



USA

Profile

- 65% of past visitors from the US have visited regional England, so a higher awareness of places outside of London than seen among visitors from Europe
- Barriers to visiting England in the future include a 'lack of reasons to visit England', a preference to stay in the US and a 'greater appeal of other places'
- **Lack of knowledge** is a barrier for **16%** of people from US
- **47%** of people have heard of, but know nothing about Kent
- Past visitors to Kent generally have positive memories, with 53% rating their experience as 9 or 10 out of 10. A third of people in the US would definitely be willing to recommend Kent to others
- Visitors from the US are most likely to have taken **day trips** to Kent, perhaps as part of a wider England tour or a trip out from London. Potential visitors from the US are open to staying longer in Kent in future. The triggers to staying longer are broader than seen in other countries, with specific events or experiences and more choice of accommodation noted.
- At the time of the research, people in the US had concerns about **Covid**, which led 51% to say they will take more holidays 'at home', with 28% expecting the changes to their holiday habits to be long term. However, the situation is changing rapidly still and as restrictions and risks diminish, a wider return to international travel is expected
- **Sustainability** is '**very**' important to holiday choices for 27% of people from the US and '**quite**' important for a further 21%. Areas of most importance are unpolluted beaches and green spaces, and actions to protect the natural landscape. People in the US are also interested in **food miles and local provenance**, the use of **Green tourism accreditations**, **eco-friendly accommodation** and **green transport**
- **Brexit** is causing concern even for potential visitors from the US, with **42%** concerned about **difficulties at border control**, influenced perhaps by the US visitors who include England in a tour of Europe



USA

Research & Booking

- Online channels are the main information sources when planning a trip to Kent. Americans will use a variety of websites, including review sites to inform their decision.
 - **Special offers/discounts** are the most important influencer on the decision to visit Kent, along with desire **to explore** the area. The variety of activities and experiences are also important to people from the US
 - **48%** of visitors from the US would book a holiday package and **40%** would book independently direct with accommodation and attraction providers
 - Top reasons to visit Kent are:
 - **Countryside and natural beauty**
 - **Unique experiences available**
 - **Cultural attractions (historic buildings, famous sights)**
 - **Beaches and seaside**

US – sources of information

1. General online search
 2. Visit a Kent destination website
 3. Visit review websites
 4. Visit the specific attractions websites
 5. Use a travel guidebook

Perceptions of Kent

- Visitors from the US are inspired by outdoor imagery, both relaxed food & drink experiences and more active and exciting ones
 - These themes are reflected in the positive spontaneous associations with Kent around both the beauty and the food. The history of the area is also mentioned spontaneously and appeals to potential visitors as a theme





USA

Immersive Experiences

- Interest in activities and experiences is generally high in the US, presenting an opportunity to convert day-trip or short-break visitors to a longer stay in Kent
- Activities of most interest are those that have a very clear link to the area, providing an insight into Kent. Experiences that are seen as unique and authentic are most appealing to the US audience

Top 10 Experiences

- Wildlife reserve experience
- River tours
- Cider farm tour and tasting
- Heritage arts tours
- Photography tour
- Guided hikes and walks
- Vineyard tour and tasting
- Brewery tour
- Nordic walking
- Sustainable rural retreat

Transport

- Visitors from the US will arrive by plane (36%), or by car (25%) presumably when Kent is part of a wider tour of England and/or Europe
- Once in Kent, visitors from the US will be most likely to travel by car. 15% of US visitors expect to travel around Kent by taxi, making access to more remote destinations and experiences easier.

Accommodation

- The type and quality of accommodation available is **very important** in choosing Kent as a holiday destination for **48%** of visitors from the US (and **quite important** for a further **44%**)
- **29%** people think the quality of accommodation options in Kent is **excellent**, with 31% saying it is very good
- **For 76%** of visitors from the US, the accommodation either **makes the holiday or has significant influence**, further highlighting the need for greater accommodation choices
- **High-end and mid-range hotels** are most popular (both 27%) for future trips to Kent. There is growing interest in **bed & breakfast/guest houses** for visitors from the US.

Segmentation

- VisitBritain segmentation was included to provide insight into visitors based on the attitudes and behaviours

Segment	Global Size Estimate*	Domestic Audience for Kent	Inbound Audience for Kent				Profile Headlines
Adventurers	16%	24%	US	Germany	Spain	France	Older, 67% aged 45 years+ Enjoy travelling off the beaten track Like spending time outdoors in nature Seek out new experiences
Buzzseekers	38%	27%	46%	30%	41%	44%	Younger, 64% aged 18 – 34yrs Free spirited and spontaneous They like to take action & excitement trips
Explorers	23%	29%	24%	37%	27%	22%	Older, 58% aged 55 years+ Content at a more relaxed pace Nature lovers enjoy the outdoors as well as must-see sites Enjoy embracing local culture
Sightseers	12%	10%	7%	7%	12%	7%	Older, 57% are aged 55 years+ Like to stay within their comfort zone Prefer cities to countryside Seek sensible, well-planned trips
Culture Buffs	12%	10%	10%	9%	8%	10%	Average age 37 years Image and brand conscious Travelling is often a status symbol Like well-known and safe destinations



Kent Perceptions Research - Country Summaries

March 2022



EUROPEAN UNION
European Regional
Development Fund