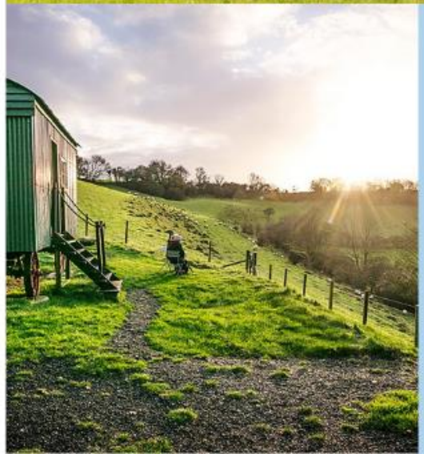
EUROPEAN UNION
European Regional Development Fund

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

Interreg EXPERIENCE- Social Impact Monitoring: Kent Residents Survey

WAVE 3 - Summer 2021

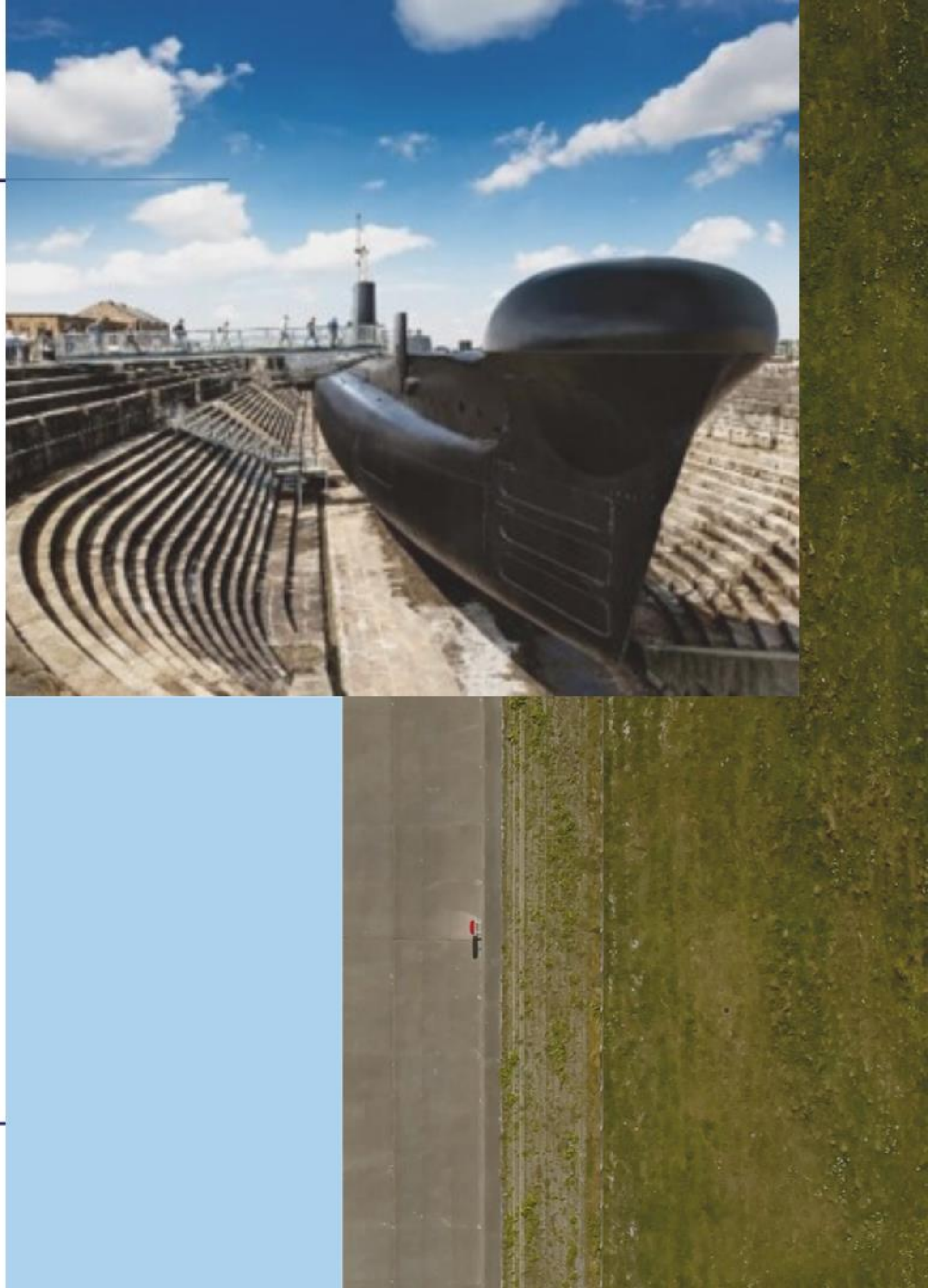
February 2022



VISIT KENT
BUSINESS
GARDEN of ENGLAND

Kent Downs
Area of Outstanding Natural Beauty

Contents



Introduction and Report Overview

This report looks to present findings from a recent survey sent out to Kent residents, to gather valuable insights into their perceptions of seasonal tourism, as well as the impact of the COVID-19 pandemic on local communities. This survey is the third wave in a series of surveys that are being completed, with the previous wave having been previously conducted last year based on winter tourism in 2021.

This activity is part of the Interreg EXPERIENCE project, an exciting €23.3 million European-funded project centred on the development of off-season bookable experiences, with a focus on overnight stays, to extend the tourism season. This concept is supported by the growing demand for experiential tourism, and subsequently presents an opportunity for businesses and destinations to not only increase visitation in the shoulder months, but also to strengthen the resilience of the sector post-COVID. The principle of sustainable tourism is also a topic that is embedded in the project's approach, as it seeks to ensure sustainable growth of seasonal tourism without compromising eco-systems and quality of life for local residents. The contribution that the project will bring to Kent is vital, including mitigating the impact of increased visitor footfall, and aims to bring economic, social and environmental benefits to communities and the wider destination. Moreover, the revenue generated will be used to help protect and maintain historical and cultural attractions, that are integral to the county's tourism landscape, product offering, and sense of place.

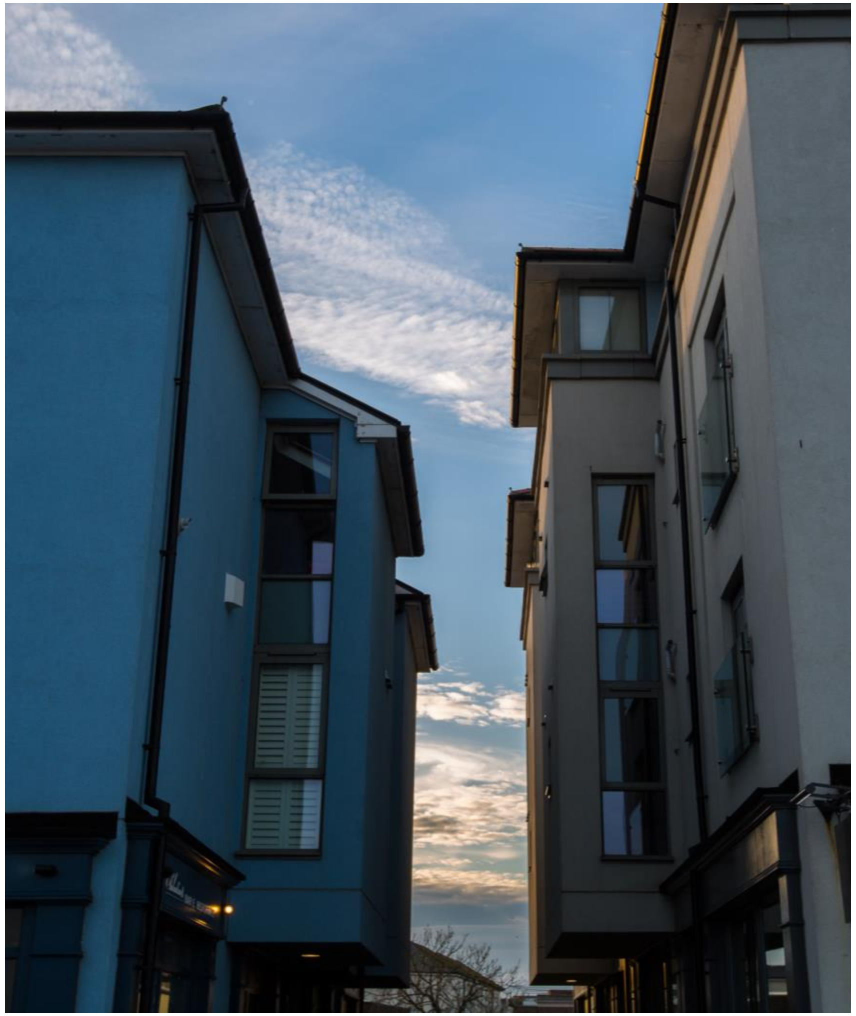
The support of residents and local communities is fundamental to successful tourism development and continuity, and can have a considerable impact socially, economically and on general wellbeing. Therefore, by monitoring these impacts over a series of surveys across the lifetime of the project, any changes to perceived impacts can be tracked and any trends can be identified. Furthermore, by assessing impacts and perceptions over the peak summer and winter season, any parallels and contrasts can be drawn, allowing findings to be aligned to help support and inform wider project activity.

This report is based on findings emerging from the third wave of data collection, interrogating perceptions around the impacts of summer tourism, with the central aim to identify key areas that differ from the sentiment expressed in the previous two waves of the survey. By doing this, key trends and parallels will be outlined to create a picture of how seasonal changes in tourism activity can impact upon residents' views towards the sector, highlighting the benefits and challenges it can bring to local communities.

Findings will also be segmented by variables such as respondent demographics, district of residency and those situated within the Kent Downs AONB, where sample sizes allow. In doing so, any findings that differ from the overall county results can be highlighted, to add further depth to interpretation and recommendations. The report will include the following sections, followed by a list of key takeaways and recommendations, which will be compiled to help inform wider project aims and objectives, alongside future waves of the survey.

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

The report that was published following the first wave of the residents' survey aimed to act as a benchmarking tool for future waves of the survey, and therefore covered results for all the questions included, to help create a picture of residents' current perceptions and support of tourism. Subsequently, as previously highlighted, reports will focus on outlining key differences and similarities between waves. However, in each respective section, questions that did not meaningfully fluctuate will also be acknowledged.

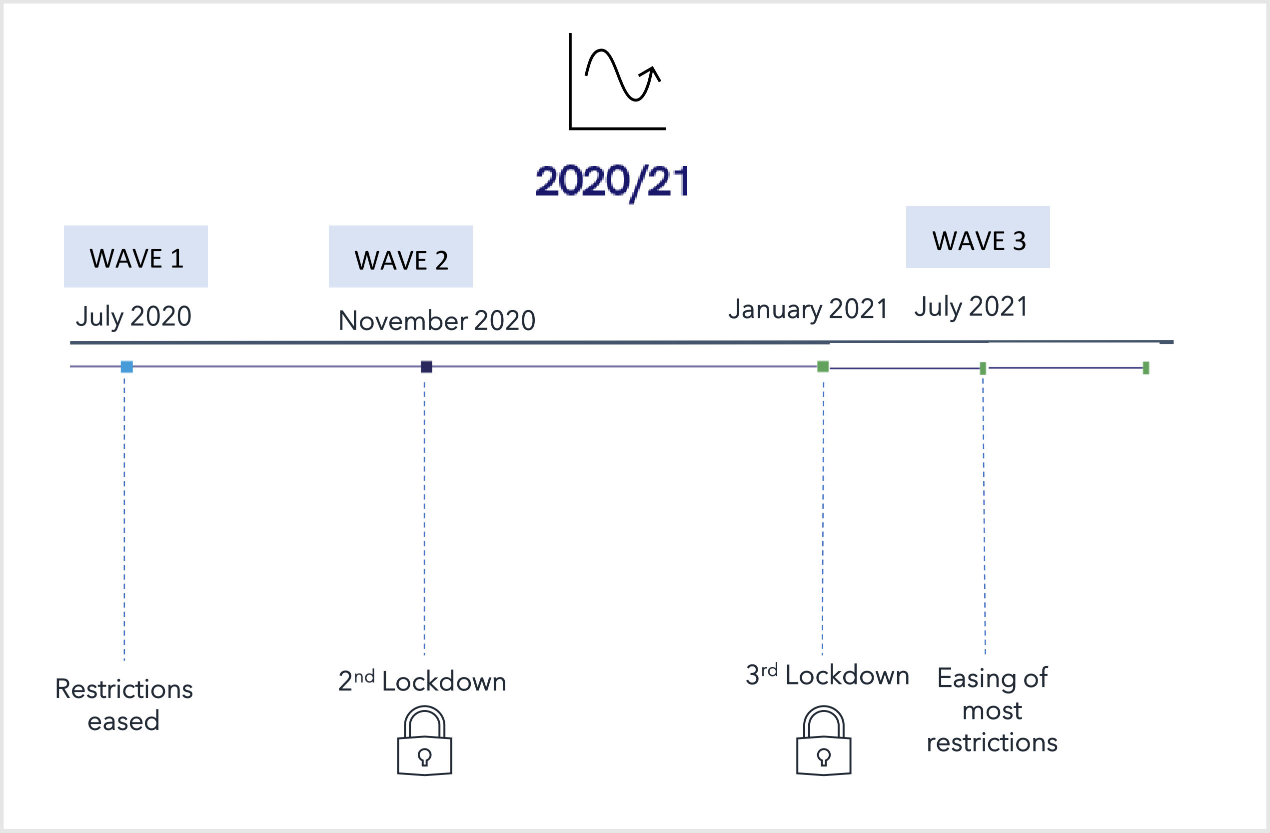


Given the unprecedented impact of the COVID-19 pandemic, continuing to outline and monitor the implications of this will be essential, and insights gained from this report will be key in helping to further recognise this impact and track any changes in perceived benefits and risks associated with tourism, across different times of the year.

As previously mentioned, this report will look to identify key differences between wave 3 and previous waves, conducted during summer 2020 and winter 20/2021. However, it will also be imperative that these findings are understood within the context of their own time, in terms of varying COVID-19 restrictions, national lockdowns and changing consumer sentiment.

For example, the initial wave of the survey was conducted at a time when restrictions and lockdowns were lifted, with many attractions and hospitality venues beginning to re-open from the 4th July. Here, residents were able to engage more with local facilities and amenities and interact more with loved ones, alongside taking part in the Eat Out to Help Out Scheme. The second wave of data collection captured both the second and third lockdowns in November and January, in addition to the tightening of restrictions around the Christmas period. Whereas, during data collection for wave 3, most national restrictions had been lifted, mostly due to the successful rollout of the vaccination programme.

Furthermore, it will be important to keep these considerations in mind when making comparisons between each wave, as in terms of activity and engagement, some of the results may have significantly altered due to various restrictions imposed at the time.



Methodology

Data Collection

01

Wave 1

Wave 1 of the survey was sent out to Kent residents in the autumn 2020, to gain an insight into perceptions of summer 2020 tourism on local communities.

02

Wave 2

Following this, wave 2 of the survey was then sent out to local residents in February 2021, with questions centering around the perceived impact of winter tourism.

03

Wave 3

Wave 3 of the survey was then sent out to local residents in September 2021, with questions centering around the perceived impact of summer 2021 tourism.

*Percentages in green represent findings from wave 3 results & differences from wave 2 are in orange

Kent Residents Survey - Wave 3*

KEY FINDINGS

This survey looked to present findings from the third wave of the 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.

63% Consider their local area to be a tourist destination

85% Of residents agreed with the statement 'I support summer tourism in my local area'

Perceived main attraction

Coast/Beaches	Museums/ Historic sites	Countryside
38% 34% ↑	29% 27% ↑	17% 23% ↓

1,251 Kent Residents

Online Survey

Local Employment

Agreement that local employment opportunities are decreasing was **-29%** lower vs. wave 2 & **-31%** vs. the initial summer wave

The Visitor Economy

Agreement that the local visitor economy is decreasing was **-29%** lower vs. wave 2 and **-30%** vs. wave 1

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

52% Agreed that tourism increases prices for local services and amenities ↑ **+5%** vs. Wave 2

Local Investment

78% Agreed that tourism helps to improve local investment, development & infrastructure spending locally, similar to wave 2 & **+25%** higher vs. wave 1

78% Of residents agreed that tourism limits the availability of parking ↑

Perceived change in visitor numbers during summer 2021

Decrease	Same/ Don't know	Increase
26% (-21%)	40%	35% (+8%)

Damage to the Environment

59% Agreed that tourism can cause damage to the natural environment **-4%** lower vs. wave 2 & **+6%** higher vs. wave 1

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 partial responses up to an agreed point in the survey were removed for consistency and accuracy purposes, which resulted in a total sample size of 1,251 respondents, a sample size that is consistent with the previous two waves. Furthermore, this provides a robust and comparative sample size. Please note, as not all questions in the survey were mandatory, sample sizes for certain questions may differ.

Online survey sent to Kent Residents

12 minutes to complete

1,251 Respondents

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 a series of questions, including age group and gender. Findings show that the majority of respondents were female **(66%)** and **33%** male, with the remaining percentage stating that they would prefer not to say.

In terms of age, **61%** were aged 35-64, followed by **23%** aged 65 and over and **15%** aged 18-34. When comparing these percentages to the previous two waves, demographically the sample is fairly similar.

Age Category (%)

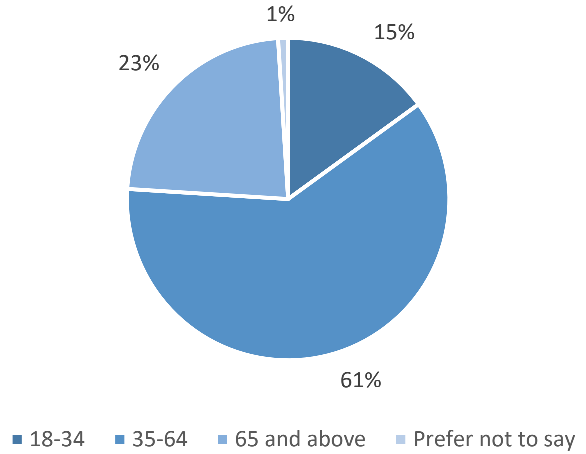
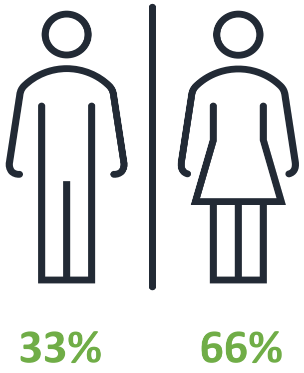


Figure 1: Graph showing the % of respondents that fell into each age category. BASE= 1251

Gender (%)



Work Status & Educational Level

Following this, respondents were asked to specify their work status, alongside the highest level of education they have achieved. Results show that the largest proportion of residents were employed full-time **(44%)**, followed by **28%** being retired. This was then followed by **17%** who stated they were employed part-time and **5%** unemployed, with the remaining **1%** consisting of those that specified they were a student. In terms of education, findings show that the largest proportion of respondents had achieved an undergraduate degree such as a BA or BSc (**33%**), closely followed by **25%** selecting A-level or NVQ level 3-4 standard. These percentages alongside those on the previous slide, indicate that overall the sample is skewed slightly towards the older demographic, alongside female residents.

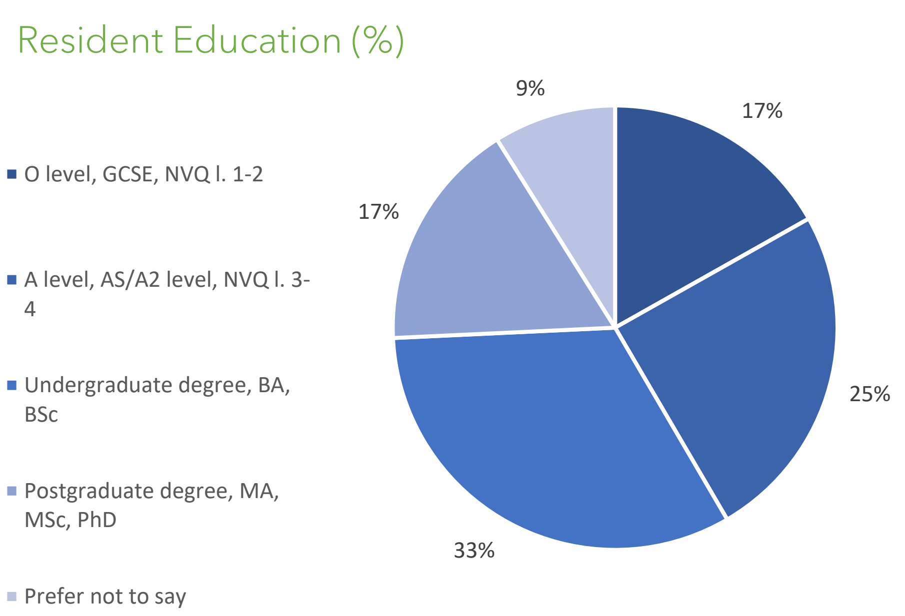


Figure 2: Graph showing the % of respondents and educational level BASE= 1251

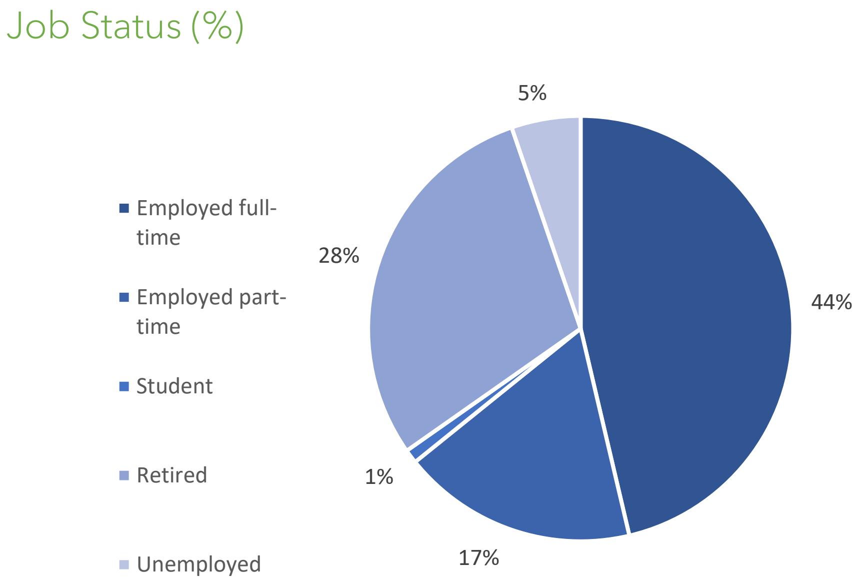


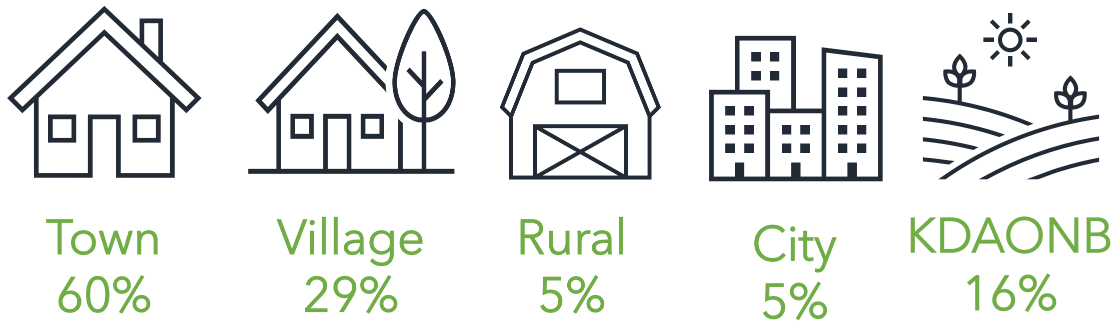
Figure 3: Graph showing the % of respondents and their work status BASE= 1251

Location & District

The survey then asked respondents to specify which district they are located in, and what best describes their local area. As shown in figure 4, the largest proportion of residents were either located in Tunbridge Wells (14%), Thanet or Canterbury (both 11%). The proportion of respondents located in each of these districts does also indicate that the sample is fairly illustrative of each of Kent's regions, with representation in East, West and North Kent. Moreover, when comparing results with those from the previous wave, the sample sizes of residents in each district is fairly consistent, with the exception of Tunbridge Wells, which saw an increase of +8% in wave 3 , compared to wave 2.

In terms of type of area, similar to previous waves, the largest proportion of respondents were located within a town (60%), followed by 29% residing in a village. Findings also show that only 5% selected rural, with the same percentage specifying they reside in a city, with the latter most likely representing those located within the city of Canterbury. The survey also asked residents if they live within the Kent Downs AONB, with 16% of residents falling into this group.

Area of Residence (%)



District of Residency (%)

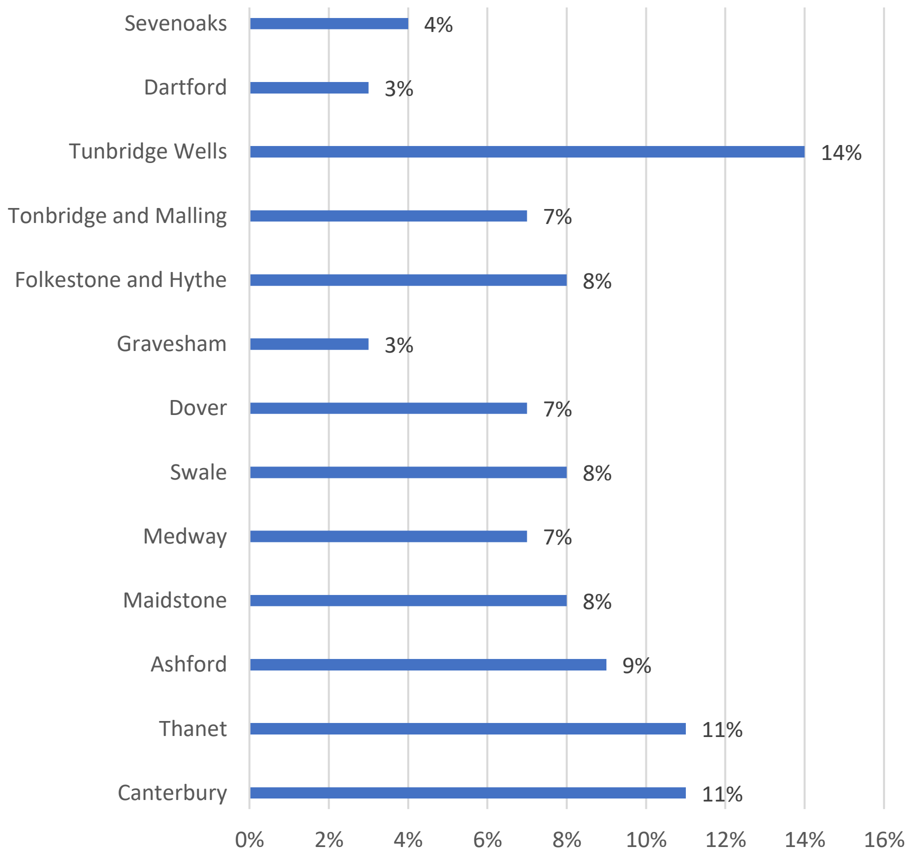


Figure 4: Graph showing the % of respondents and their home district BASE= 1251

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 (**43%**) of residents stated to have lived in their area for more than 25 years, followed by **42%** selecting between 5-25 years, with the remaining **15%** 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, which was also seen in both waves 1 and 2.

The survey also asked respondents if anyone within their household works in the tourism industry, as this may give respondents a more focused and informed view of the impact and benefits the tourism industry can bring. However, results show that only **6%** of residents had somebody in their household working within the industry. When comparing these percentages to the previous wave's sample, results show a **-4%** decrease of those working within the sector, compared to wave 2. This may highlight the industry's challenges around skills and staff retention as well as the wider impact of the pandemic.

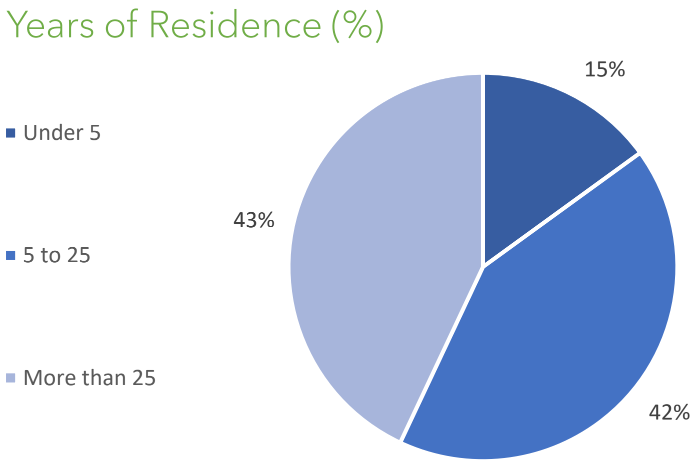


Figure 5: Graph showing the % of respondents and their length of residence
BASE= 1251

Does anyone in your household work in the tourism industry?

Yes
6%

No
94%

Main Attraction

When asked to select from a predefined list what they perceive the main attraction in their local area to be, the largest proportion selected coast/beaches (**33%**), followed by **29%** selecting museums/historic sites and buildings and **17%** countryside.

When comparing these findings to previous waves, results show that the percentage of residents selecting the coast/beaches was higher than in wave 2, based on winter tourism, most likely due to favourable weather inevitably increasing local engagement.

Findings from wave 2 showed a **+6%** increase in residents selecting the countryside as their main attraction, compared to wave 1, which indicated potential higher levels of engagement and association with rural areas and attractions in the off-season. Subsequently, results from wave 3 reflect the sentiment expressed in the initial summer wave, with the same proportion selecting the countryside as their area's main attraction. Furthermore, this trend again demonstrates the appeal and association the winter season has with the countryside, however further winter waves will allow this trend to be monitored further.

Looking at other types of attractions, the proportion of respondents selecting heritage sites is fairly consistent across all three waves, demonstrating the steady appeal and awareness of these attractions, regardless of season. Furthermore, a similar picture was observed for both outdoor attractions and shopping.

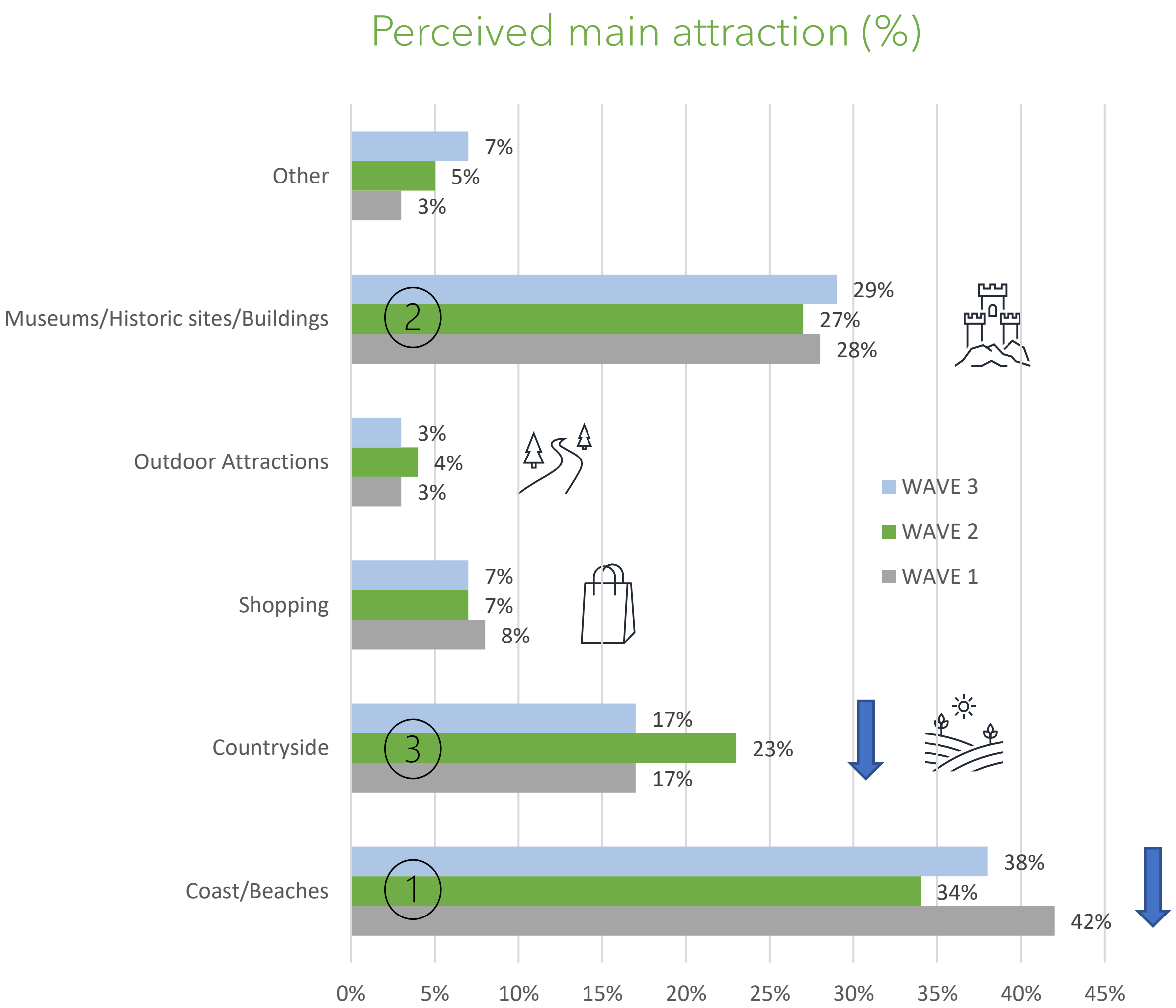


Figure 6: Graph showing the % of respondents and their perceived main attraction BASE=1251

Tourist Destination

Residents were then asked if they consider their local area to be a tourist destination, with results showing that the majority of respondents did think so, with 63% selecting 'yes' and 37% selecting 'no'. A similar sentiment to this question was also observed in both waves 1 and 2, although a slightly higher percentage (+4%) identified their local area as being a tourist destination, in the initial summer wave.

As previously seen in waves 1 and 2, respondents who identified themselves as living in a tourist destination were much more likely to perceive their main attraction as the coast and beaches compared to those who did not (43% vs. 28%). Findings also show that museums and historic sites was selected by a higher number of respondents who lived in tourist areas (32%), compared to those who did not (24%). Moreover, similar to wave 2, those living in non tourist destinations were more likely to perceive their main attraction as the countryside (27% vs. 12%).

Overall, findings once again demonstrate the prominence and value the coastal offering has to residents living in more popular tourist spots, and that these areas may also resonate highly with visitors in terms of the county's offering. Results may also indicate that those living in more rural areas receive less tourism than those situated in coastal areas.

'Similar to previous waves, residents who perceive their area as a tourist destination were more likely to select coast & beaches as their area's main attraction, while those in non touristy destinations were more likely to perceive the countryside as their main attraction'.

Do you consider your local area as a tourist destination?

WAVE 1	WAVE 2	WAVE 3
Yes 67%	Yes 65%	Yes 63%

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. Firstly, residents were presented with a list of statements about the impact of summer tourism on their local area, and were asked to indicate how much they agreed or disagreed with each statement. All statements presented to respondents also specified that questions were based on a typical summer prior to the COVID-19 pandemic.

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. The survey also defined any references to 'tourism' as people on day trips and those coming from further away for a few days or more.

In addition as with wave 1 and 2, certain responses throughout the report have been combined, for example those that selected 'strongly agree', 'agree' and 'somewhat agree', to present an overall level of agreement or disagreement. However, a full list of questions and percentages will be included for each section in the appendices.

Impact to Historical Sites & Natural Places

Initially, the survey focused on tourism's impact on preservation of historic buildings and monuments, alongside its potential to increase demand for local historical and cultural attractions. This was then followed by assessing perceptions regarding tourism's impact on the natural environment, which consisted of asking residents to rate their level of agreement with the statement 'tourism is harmful to natural places like the countryside or coast'.

The following section will look to present findings for these questions, alongside other impacts of summer tourism activity and as previously mentioned, the report will focus on identifying key differences between wave 3 and the previous two waves of the survey, to map any sentiment trends and changes that are emerging.

Impact on the Natural Environment

Residents were asked to rate their level of agreement with the statement 'tourism is harmful to natural places like the coast or countryside'.

Findings from wave 3 show that **59%** of residents did agree on some level that tourism can cause adverse impacts to the natural places, perhaps due to pollution and overcrowding in tourism hotspots. However, when comparing this to wave 2 (**63%**), agreement with this statement was lower, with recent findings seeing a **-4%** decrease in agreement. Although, agreement expressed was **+6%** higher compared to summer 2020.

Overall, sentiment across all waves is likely influenced by the increasing pressure and attention that damage to the environment and sustainability is gathering, further accelerated by coverage in the media and the need for businesses and destinations to adopt sustainable practices. Findings again also indicate that this is a pressing issue in the minds of local residents, and that the sector must continue to work to address this perception. However, the decrease in agreement may indicate that this perception is beginning to improve and may indicate some recognition of the work that the sector is doing to further integrate more sustainable approaches.

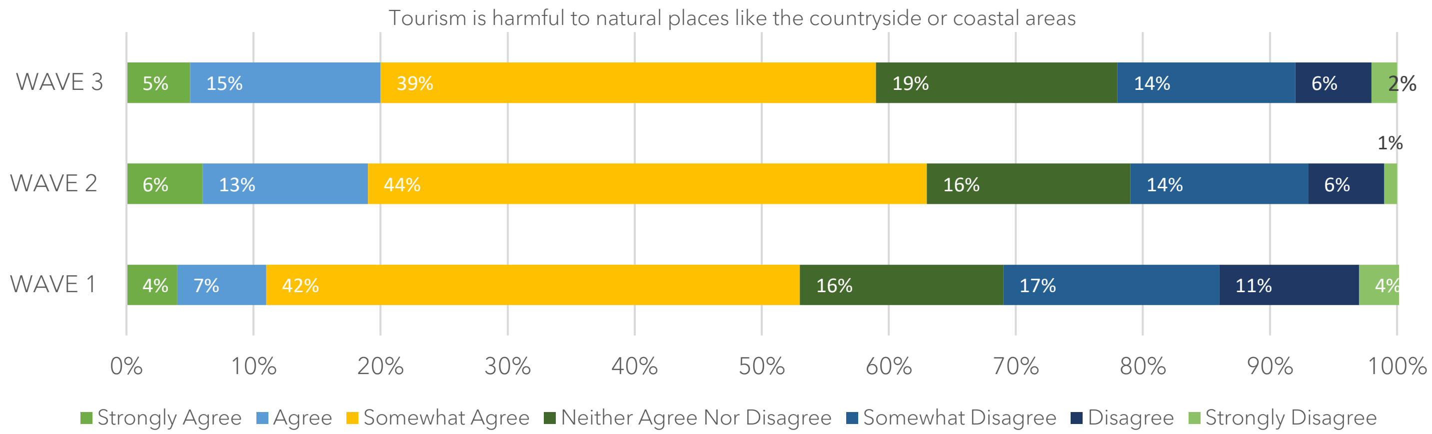
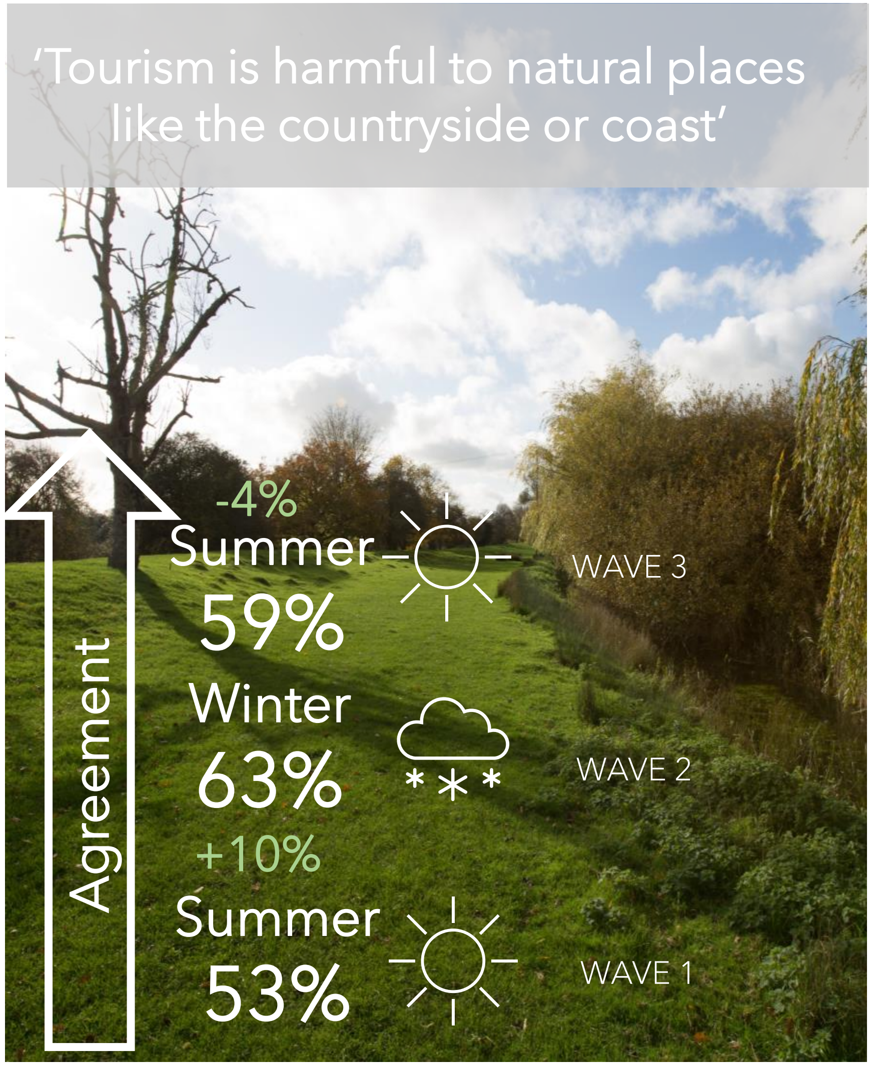


Figure 7: Graph showing agreement that tourism is harmful to natural places BASE=1251



Availability of Local Facilities

The survey asked residents to rate their agreement with the statement 'tourism increases the availability of local recreation facilities and opportunities', with findings showing that **79%** agreed with this to some degree. Looking at the results further, although sentiment is consistent with the previous wave, agreement saw a **-7%** decrease compared to the initial summer wave. Findings do still highlight that residents do recognise the contribution tourism brings to bettering the availability of local facilities. However, this decrease compared to the first wave may be a reflection of business closures due to the pandemic, and although questions were centred on tourism pre-COVID the pandemic's significant effects may have impacted some respondents' perception of this.

Visitors in Local Area

Findings also show that there was a **-4%** decrease in agreement that there are too many visitors in residents' local areas. Overall, as with previous waves, agreement with this is minor, indicating that residents do not negatively perceive visitors' presence or think their area is overcrowded due to tourism. Results from this wave also closely align with that of the initial summer wave, indicating that residents feel that there are more visitors in the winter, demonstrating a consistent trend with summer, although again this may be due to more visitors exploring open natural areas in winter 2020 due to the pandemic.

Parking Availability

When asked if tourism limits parking spaces available to local people, looking at the trend across all three waves, agreement has steadily increased, with **78%** expressing some level of agreement, compared to **73%** in wave 2 and **71%** in wave 1. Consequently, these results indicate that perceptions around this aspect is declining and demonstrates the growing need to better parking facilities and further encourage visitors to utilise public transport networks. Furthermore, due to the impacts of COVID-19, many are opting to travel by car, although as consumer confidence begins to rise, use of public transport may increase and ease this issue.

Agreement

	Wave 1	Wave 2	Wave 3
'Tourism increases availability of local recreation facilities/opportunities'	86%	82% ⇩	79% ⇩
'There are too many visitors in my local area'	16%	22% ⇧	18% ⇩
'Tourism limits parking spaces available to local people'	71%	73% ⇧	78% ⇧

BASE = 1251

Perceived Benefits of Summer Tourism

The survey then presented respondents with a series of additional statements, regarding their perceptions of other benefits and impacts of summer tourism, including its influence on the local economy and creation of employment opportunities.

Local Economy & Employment

When asked about tourism's contribution towards local employment opportunities and the local economy, findings show that agreement around these areas has increased compared to wave 2 in winter 2020. However, percentages are slightly behind the initial summer wave. Overall, this indicates that perception around this is steadily improving, likely aided by the re-opening of local businesses and the sector.

Local Services & Prices

Following this, respondents were asked if tourism increases prices locally, alongside reducing their ability to access local services and facilities. As illustrated in the diagram, agreement that prices have increased rose by +5% compared to wave 2 and +7% compared to the first summer wave. This increase may be due to the record high rise in inflation, with a major contributor stemming from the increase in petrol costs.

Furthermore, agreement that tourism reduces residents' ability to access local services and facilities, has increased throughout each wave, being +5% higher compared to winter and +7% more that the initial wave.

	Agreement		
	Wave 1	Wave 2	Wave 3
'Tourism increases employment opportunities'	92%	79%	88%
'Tourism improves the local economy'	96%	90%	94%
'Tourism increases prices for local services and amenities'	45%	47%	52%

BASE = 1251

While this only sits at 30%, the majority did not express this sentiment, with this increase potentially being a knock on effect of the price increases expressed.

Local Investment & Infrastructure

In the previous wave, an area which emerged strongly was residents' outlook on tourism's role in improving local investment, development and infrastructure spending in the local visitor economy, seeing a **+27%** increase in agreement.

Looking at wave 3, although only slight this perception saw a **-2%** decrease in agreement compared to wave 2, however this does display a **+25%** increase compared to the initial summer wave. This trend may be due to several aspects and as mentioned in the previous report, this could have been aided ongoing or planned developments in various areas of the county.

Consequently, ongoing activity and media coverage around these could have contributed towards this increase further, and demonstrates that residents are acknowledging this.

However, looking at the wider picture, due to the previous reduction in visitors as a result of the pandemic, this may have highlighted the importance and reliance on visitor spend and investment opportunities tourism can bring to local areas in the minds of residents. This shift in awareness towards the positive impact that a vibrant visitor economy can have on an area is also likely to have been influenced by news coverage on the impact that the sector can have.

Alongside this, the government has also targeted a lot of infrastructure and place making investment spending in areas that heavily rely on tourism activity. Consequently, any news coverage regarding this may have helped residents make the link between a thriving visitor economy and attracting funding and inward investment from the government and other organisations. Furthermore, examples of funding in the county that may have helped influenced this sentiment, include the Towns Fund projects in Margate, Future High Street Funds (in Dover, Chatham and Ramsgate) and Community Renewal Funds in Thanet, Canterbury, Swale and Gravesham.

In addition to the previous questions, there were particular areas that did not show a significant difference compared to the previous two waves, which include the following.

- Preserving historic sites and demand – Agreement that tourism preserves historic buildings and monuments, increased slightly in wave 3 to **91%** compared to **88%** in wave 2, although this is still behind sentiment in wave 1 (**93%**). In addition, agreement in wave 3 that tourism drives demand for these types of attractions, saw the same trend, being **+2%** higher compared to winter (**94%** vs. **92%**) and slightly below the first summer wave (**95%**). Collectively, these results demonstrate that these areas are perceived as key impacts of tourism activity and are being sufficiently acknowledged by residents. Furthermore, as highlighted in the previous wave, moving forward a continued effort should be placed on reinvesting income generated and accessing funding streams to ensure historic and cultural sites are preserved, which will not only attract visitors, but will also ultimately benefit local residents and increase a local sense of pride.

- Meeting Visitors – When asked if residents like to meet visitors in their local area, findings from wave 3 mirror the sentiment expressed in previous waves, with the largest proportion (**61%**) expressing some level of agreement, which again shows the willingness and desire to engage with visitors and that their presence is not negatively perceived.

- Public Transport Services – Findings show a stagnant outlook on this area, with again around **36%** of respondents agreeing that tourism increases these services, which was also observed in the previous two waves of the survey. Moreover, this ongoing sentiment, could be a reflection of various factors, including some areas in the county, particularly those situate in more rural areas not benefiting as much in terms of transport connection as opposed to more urban areas. In addition, due to the impact the pandemic has had on the use of public transport, uncertainty and concerns around hygiene may have contributed to this further.

Impact of Summer Tourism- By Respondent Type

Age Catergory

- In terms of tourism activity being harmful to natural places such as the countryside and coast, although agreement among all age groups saw a decrease during the summer period, as seen in both previous waves, this was highest among those aged between 18-34 (65%), +11% higher than the oldest age category. Furthermore, looking at results across all three waves of the survey, these findings demonstrate the ongoing trend that the younger demographic are more conscious of issues surrounding the natural environment.

Location

- Looking at results by location, firstly they show that although all locations have seen a steady increase in agreement that tourism limits parking availability to local people, this was highest among those situated in rural areas, seeing an increase of +8%. While overall results indicate this is an issue across the county, those in more rural areas feel that parking is a particular issue, which may be due to less availability compared to towns and city areas.

- In terms of improving investment and development, as seen in previous waves residents living in a city or town agreed with this more so. Although, agreement among those living in a city saw a decrease of -10%. However, those living in rural areas saw the lowest level of agreement (70%) a decrease of -10% compared to winter 2020, although overall sentiment still demonstrates a positive sentiment. Again, these findings are likely a consequence of cities and more built up areas receiving a higher visitor footfall, and therefore attracting more investment and a need to develop this to meet demand.

- Looking at tourism's impact on public transport services, mirroring previous waves, those situated in a city displayed the highest level of agreement that tourism facilitates an increase in services, however agreement among this segment did see a decrease of -23% compared to wave 2.

Main Attraction

- Looking at agreement that tourism is harmful to natural places like the countryside or coastal areas, previously in winter 2020 residents who selected the countryside as their area's main attraction displayed the highest level of agreement (68%), an increase of +19% compared to wave 1, which highlighted the impact to the rural areas during the past winter season. However, looking at the most recent survey findings, in wave 3 sentiment around this shifted back to results seen in the initial summer wave, with residents who perceive the beach to be their area's main attractions displaying the highest level of agreement (64%). Furthermore, this indicates that residents may feel that tourism is more harmful to coastal areas during the summer, likely due to the warmer weather attracting an increase in footfall.

- Residents who perceive their area's main attraction to be the beach/coast expressed the highest level of agreement that there are too many visitors in their local area, a trend that has been seen across all three waves, with this perhaps indicating the ongoing popularity of this type of attraction in the county, regardless of season. However, those who selected the countryside saw a decrease of -6% in summer, further highlighting the potential appeal of more rural outdoor areas in the off-season, which was likely to have been enhanced due to COVID-19 restrictions that were in place during winter 2020.

The Kent Downs AONB

- When analysing findings by those residents who specified they lived within the Kent Downs AONB, firstly results show that they were more likely to agree that tourism causes harm to the natural environment (65%), versus all respondents (59%), being +6% higher. Furthermore, this sentiment indicates that residents living within these areas are more conscious of environmental issues perhaps exaggerated by the abundance of outdoor landscapes.

- Results also show residents living within the Kent Downs AONB were +5% more likely to agree that tourism limits parking availability for local residents compared to all respondents (83% vs. 78%). Consequently this supports previous findings that parking in more rural areas is an issue compared to those in more built up locations, and that there is a need to improve this perception among local residents.

- Finally, when asked if tourism helps to facilitate more public transport services, Kent Downs AONB residents were -4% less likely to agree with this versus all respondents (31% vs. 35%). Furthermore, this further highlights the need for transport services to be improved in more rural areas.

District

- Findings for wave 3 show that agreement was highest among residents living in Dover (**97%**) and Maidstone and Medway (both **96%**) that tourism helps to preserve historic buildings. However, when looking at the percentage change between summer 2021 and the previous winter, respondents situated in Sevenoaks displayed a **+10%** increase in agreement, while those in Tonbridge and Malling were **-6%** less likely to agree with this.

- Overall, results show that agreement across all waves of the survey have been consistent in Dover Medway and Maidstone, potentially illustrating the importance of tourism's contribution to preserving historic sites that make up an integral element of the districts tourism landscape and assets.

- When analysing findings by district and respondents' agreement that tourism is harmful to natural places, results show that the highest level of agreement was observed from residents living in Sevenoaks (**66%**) and Thanet (**64%**). Although, in the previous wave based on winter 2020, the highest level of agreement was observed from those living in Canterbury, with results from the most recent wave showing a **-11%** decline in agreement, alongside a **-13%** decrease among those living in Tunbridge Wells. These findings may indicate that residents living in Canterbury and Tunbridge Wells are more likely to observe harm to the environment in the winter months, which may be a reflection of some visitors looking to access more urban areas in the off-season.

- Results also show that residents from Thanet have consistently displayed one of the highest levels of agreement across all three waves of the survey, that tourism limits parking availability for local people, alongside those situated in Canterbury district. When looking at percentage changes for wave 3, those living in Maidstone and Swale displayed the highest increase in agreement of +9%, compared to the previous wave. Furthermore, this demonstrates that parking availability is an issue particularly within these areas and that tourism activity limits availability and work should continue to focus on bettering parking facilities for local residents.

- When asking respondents if there are too many visitors in their local area, results firstly show that those situated in Canterbury have consistently displayed the highest level of agreement with this statement, which could be a reflection of a high visitor football particularly in Canterbury City centre, alongside some of the popular coastal spots. A similar picture was also observed among residents living in Thanet, which again may demonstrate the presence of tourism hotspots in coastal areas of the district. However, when looking at the most recent wave, the largest decrease observed was among those living in Sevenoaks (-18%), which strongly demonstrates that residents have observed more visitors during the winter period compared to summer which may be a reflection of people looking to explore more open natural areas, due to COVID-19 restrictions that were in place.

- Findings from wave 3 show that those living in Folkestone and Hythe and Thanet displayed the highest level agreement that they like to meet visitors in their local area, with Thanet also displaying a high level agreement in previous waves. Results also show that Folkestone and Hythe residents were +9% more likely to agree with this in summer. Results indicate that Thanet residents in particular are very welcoming of local visitors throughout the year, while sentiment around visitor presence has increased considerably in Folkestone and Hythe and Sevenoaks in summer 2021.

- In terms of tourism's contribution to increasing employment opportunities, in wave three agreement was highest among those living in Folkestone and Hythe and Canterbury, both 95%, followed by Thanet (93%) and Ashford (92%). While, Canterbury residents have consistently displayed a high level of agreement, those in Folkestone and Hythe were +19% more likely to agree with this compared to wave 2, alongside those from Sevenoaks (+16%). Moreover, this may indicate that there has been an increase in employment opportunities for local people in the aforementioned districts, which has resulted in an increase in local perceptions.

- Findings then showed that similar to previous waves, Medway residents were most likely to agree that because of tourism there are more public transport services available, with **48%** of residents agreeing with this statement compared to **35%** among all respondents. This sentiment strongly indicates that residents in Medway feel that the local area strongly benefits from transport connections due to tourism activity.

- Looking at tourism's ability to improve local investment and infrastructure spending in the local economy, Medway residents displayed the highest level of agreement (**89%**) compared to all respondents (**78%**). Furthermore, this sentiment may be a reflection of activity and projects around the recent UK City of Culture Bid, with this having had a positive impact on residents' perceptions of local investment in the area due to tourism.

- In terms of tourism increasing local prices, agreement was highest among those living in Canterbury (**65%**) and Folkestone and Hythe (**60%**), compared to **52%** among all Kent respondents, with the latter displaying a **+13%** increase in agreement compared to wave 2.

- Findings for wave 3 also show that residents from Thanet (**43%**) and Swale (**40%**) were most likely to agree that tourism reduces their ability to access local services and facilities, with Swale seeing a **+16%** increase in agreement. Furthermore, districts such as Thanet and Canterbury which have seen high levels of agreement throughout all waves of the survey, were also two of the districts that strongly acknowledged that there can be too many visitors in their local areas, which may be having a negative impact on their ability to access local services. Consequently, when looking at future activity it will be important to continue to ensure that tourism hotspots in these areas are not overcrowded and work to increase off-season visits to areas that are perhaps not as well known.

Key Benefits & Impacts of Summer Tourism

When looking at the key benefits and impacts of summer tourism overall, the below diagram illustrates the top three statements that respondents agreed with the most, while also highlighting the percentages from each wave of the survey.

The top three positive impacts of tourism in that emerged from wave 3 remained fairly unchanged compared to the previous two waves.

Furthermore, when looking at areas for improvement, the top three as shown below remained unchanged, with issues around lack of available parking, harm to the natural environment and price increases.

Wave 1 Wave 2 Wave 3 – Agreement (%)

Top 3 Impacts of winter Tourism in Local Area

1. Increases demand for local historical and cultural attractions — 95% 92% 94%
2. Tourism improves the local economy — 96% 90% 94%
3. Preserves historic buildings and monuments — 93% 88% 91%

Areas for improvement

1. Tourism limits parking available to local people — 71% 73% 78%
2. Tourism is harmful to natural places such as the countryside/coast — 53% 63% 59%
3. Tourism increases prices of local services and amenities — 45% 47% 52%

KENT RESIDENTS SURVEY FINDINGS:

IMPACT ON WELLBEING & EMOTIONAL CONNECTION

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 pandemic, to identify any connections between tourism and impact on the 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 winter pre-COVID in their area.

Resident Satisfaction

In terms of resident satisfaction, as in previous waves the majority of respondents (87%), express some level of agreement that they were happy with their life and lifestyle. Although these aspects did see a decline in agreement of around -5%, compared to wave 2 this showed more of a decline compared to the initial summer wave. The survey also asked respondents to rate their level of agreement with the statement 'Overall, I feel very excited about my future', with findings showing that agreement with this decreased by -10% compared to wave 2, while also being -5% down on wave 1, based on summer 2020 tourism.

These insights indicate that there was a slight decrease in overall resident satisfaction and optimism for the future, which for some may be a reflection of uncertainties around the pandemic and additional variants, with concerns around a potential increase in cases in the winter months to follow.

Findings also show that when asked if they feel calm and relaxed, this saw a -6% reduction compared to wave 2, although this was consistent with findings from the initial summer wave. Consequently, this may indicate that some residents feel calmer and more relaxed in the off-season compared to summer, potentially due to this being a quieter time of year locally with some having time off work due to the Christmas period.

	WAVE 1	WAVE 2	WAVE 3
I feel calm and relaxed	72%	77%	71%
I feel very excited about my future	70%	75%	65%

BASE = 1251

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. The following headings present findings for statements that showed a difference between waves.

The Natural Environment

Respondents were asked to rate their agreement with the statement 'tourism protects and enhances the natural environment'. Findings show that 45% of residents selected some level of agreement, a -6% decrease compared to wave 2 and -10% lower than the first summer wave. Similarly, to wave 1, results for wave 2 still indicate that a significant proportion of residents feel tourism does protect and enhance the environment, however, this decrease does mirror previous agreement that tourism is harmful to natural places. Furthermore, results show that there is still an opportunity to raise the awareness of current environmental efforts and to increase activity in particular areas of the county that may feel this more strongly.

Connection to the Local Area

Looking at agreement with the statement 'I live in a beautiful area', findings for wave 3 show that this was -6% lower compared to the wave 2 (80% vs. 86%), although the response was fairly on par with sentiment expressed in the initial summer wave. This change in sentiment could be due to residents spending more time locally during the winter, due to increased COVID-19 restrictions and the imposed national lockdown, which may have increased their appreciation for the area. And as shown in the infographic, sentiment for this was higher among those living in the KDAONB. Moving forward, it will be important to continue to track this trend, to establish if a similar pattern is observed in the future winter waves.

Looking at other areas, results from wave 3 indicate that residents did not agree as highly that visitors' presence makes them feel more strongly connected to their local area, while only minor this saw a decrease in agreement compared to wave 2, although this was fairly consistent with the initial summer wave. Furthermore, this may indicate that visitors' presence during the off-season may positively impact local residents more so compared to the high season, although traditionally winter is a quieter time of year.

Kent — I live in a beautiful area*

WAVE 1	WAVE 2	WAVE 3
82%	86%	80%

KDAONB — I live in a beautiful area*

WAVE 1	WAVE 2	WAVE 3
100%	96%	92%

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

When asked if residents felt safe living in their local area for wave 3, 82% of residents displayed some level of agreement with this, a decline of -5% compared to both previous waves.

Alongside this, agreement that residents felt financially secure also saw a decrease compared to previous waves, being -8% lower than wave 1 and -6% lower than wave 2. In contrast, 63% of respondents agreed their local area is tranquil, peaceful and calm, and although this was -6% lower compared to winter, this was +6% higher compared to the initial summer wave.

Collectively these findings may indicate that during summer 2021 some residents may have experienced financial difficulties, and together with uncertainty around the pandemic may have resulted in some residents feeling a decreased sense of safety.

With regards to other statements included in this section, residents displayed a similar level of agreement in wave 3 compared to waves 1 & 2 when asked to rate their level of agreement with the statement 'I dislike living here', with only 7% of residents expressing some level of agreement, a -2% decline compared to wave 2.

Residents may have experienced financial difficulties, and together with uncertainty around the pandemic, may have resulted in some residents feeling a decreased sense of safety.

Resident Satisfaction

The next section of the survey then looked to measure any changes in residents' emotional connection to their local area, brought about by the impact of the COVID-19 pandemic. When looking at trends across all three waves, firstly findings show that in wave 3 there was a decrease of **-8%** in agreement that residents feel more strongly connected to their local area, compared to wave 2. In addition, there was a decrease of **-7%** in agreement that residents feel safer and more secure, compared to wave 2, with this also seeing a larger decrease of **-10%** compared to the primary summer wave.

Agreement*	Wave 1	Wave 2	Wave 3	
'I feel more strongly connected to my local area'	65%	65%	57%	⇩ -8%
'I feel safer and more secure living here'	58%	55%	48%	⇩ -7%
'My local area is more tranquil, peaceful and calm'	49%	54%	39%	⇩ -15%

*% of agreement is a combination of percentages of those that selected- 'strongly agree', 'agree' and 'somewhat agree'. BASE = 1251

Overall, this may demonstrate that due to the pandemic and uncertainty around additional variants at the time, this had a knock-on effect on residents' feeling of safety.

Furthermore, as restrictions were less stringent during summer 2021, residents may have spent less time within their local area, and less time spent, may have lessened their connection. Looking at other insights, there was a **-15%** decline in agreement that residents' local area is more tranquil, peaceful, and calm compared to wave 2 based on winter 2020.

Consequently, this may further indicate that in the off-season residents feel an increased sense of calm, which could be due to less activity and factors such as having time off work for the festive period.

Impact on Emotional Connection- By Respondent Type

Location

- Mirroring previous waves, results show that residents living in rural **(82%)** and village **(93%)** areas displayed the highest level of agreement with the statement 'I live in a beautiful area', compared to **80%** among all respondents. However, in terms of percentage change, the most notable difference was observed from residents living in rural areas, seeing a decrease of **-14%,** compared to wave 2. Again, findings certainly highlight the sense of pride among those in rural locations and the strength of Kent's strong countryside offering. Although, this decrease observed in rural areas, may be an indication of residents perceiving these areas to be more appealing in the winter months.

Main Attraction

- Similar to wave 2, residents who selected the countryside as their area's main attraction, felt most strongly connected to their local area post-pandemic, a finding that was also seen in wave 1. Furthermore, while this sentiment saw a slight decrease of **-5%** compared to winter 2020, results do show an ongoing trend that those living in countryside areas have developed a stronger connection to their local area post pandemic.

District

- Residents from Folkestone and Hythe (54%) and Tunbridge Wells (52%) expressed the highest level of agreement that having visitors around helps them feel more strongly connected to their local area, compared to 46% among all Kent respondents. In addition, when asked if they feel more strongly connected to their local area post COVID-19, this was again highest for Folkestone and Hythe (66%), which may demonstrate that within this district residents have a strong connection to the local area, over the most recent summer.

The Kent Downs AONB

- Looking at results by those that stated they live within the Kent downs AONB, findings show that these residents were +13% more likely to agree that their local area is tranquil peaceful and calm compared to all respondents (76% vs. 63%). Alongside this, 92% of AONB residents agreed that they live in a beautiful area (+12% higher compared to all Kent respondents).
- When looking at residents' emotional connection to their local area post pandemic, residents in the Kent Downs AONB were +11% more likely to agree their area was more tranquil, peaceful and calm post pandemic, compared to all respondents (50% vs. 39%). A similar picture was also observed when residents were asked if they felt a stronger connection to their local area following the pandemic, with 68% of AONB residents displaying some level of agreement with this compared to 57% among all Kent respondents, being +11% more likely to agree with this statement.
- Collectively, findings demonstrate that those living in the AONB displayed a greater sense of pride and contentment with their local area following the pandemic. When looking at why this may be, this could indicate that those living in areas with more open natural spaces benefit more so in terms of having a less crowded peaceful environment. Alongside this, these results may also further highlight the strength and beauty of Kent's natural environment.

KENT RESIDENTS SURVEY FINDINGS:

SOCIAL, CULTURAL & ECONOMIC IMPACTS: POST-COVID

Social and Cultural Risks Post COVID-19

In order to continue monitoring the impact brought about by the COVID-19 pandemic, the survey also looked to gain an insight into various perceived social, cultural and economic risks facing residents' local area. To achieve this, as in wave 1 & 2, respondents were presented with a series of statements regarding tourism in summer 2021, to establish any changes in sentiment from the previous waves.

Firstly, residents were asked to select the statement that best defined their summer 2021 activity, in terms of trips taken from home. As illustrated in the graph, as expected due to COVID-19 restrictions lifting, the number of respondents who specified they stayed at home due to the pandemic saw a reduction **(-46%)**, compared to winter 2020. However, as with previous waves, this still accounted for the largest proportion of residents (**45%**), followed by **34%** going on holiday outside of Kent as they normally would. Furthermore, looking at results overall, findings show that residents were more active in terms of travel, both within and outside of the county, reflecting the removal of restrictions and perhaps increased consumer confidence for some, most likely as a result of the rollout of the vaccination programme.

When cross-referencing activity with age category, findings again show that residents over 65 were more likely to have stayed at home because of COVID-19 (**55%**), compared to residents aged 18-34 **(38%)**. Similar to waves 1 & 2, this difference in activity is likely due to the increased health risk of the virus to older age groups. However, when looking at travel within the county, this was consistent across all three age groups.

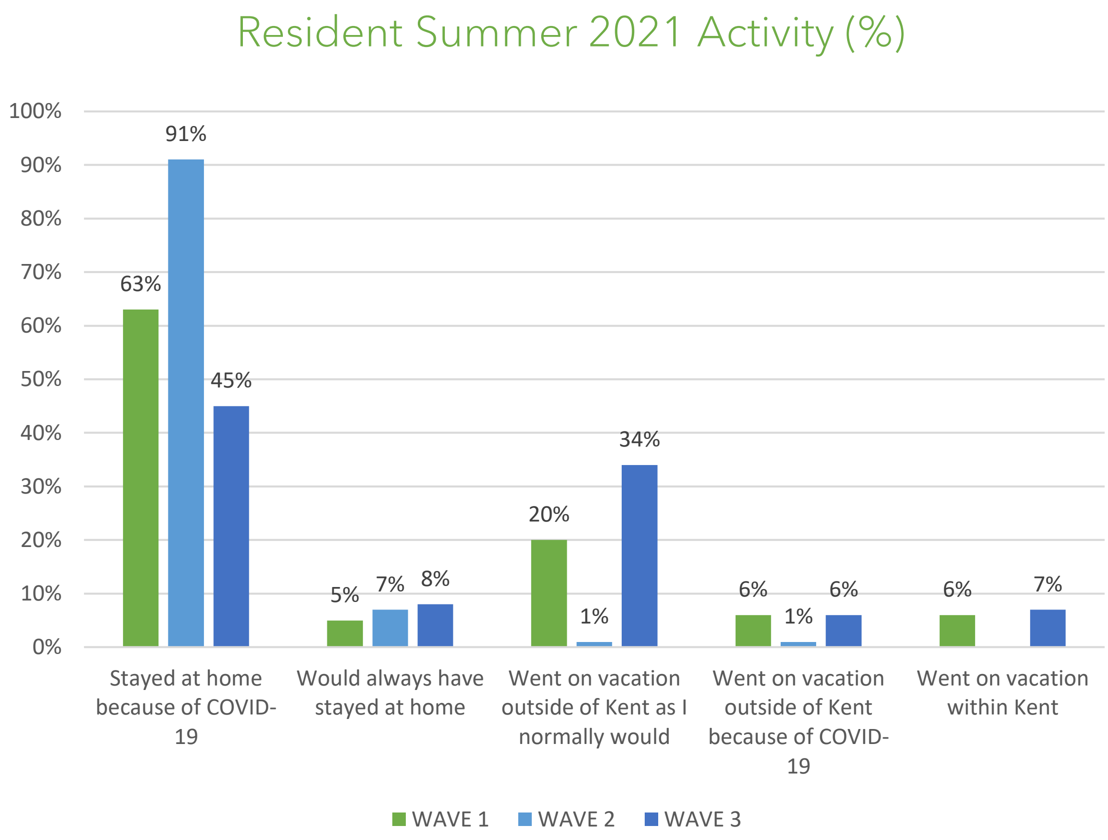


Figure 8: Graph showing the % of respondents and their 2021 summer activity BASE=1251

Change in Visitor Numbers

Respondents were then asked if they had observed a change in visitor footfall to their local area during summer 2021, as a result of the pandemic. As illustrated in the graph below, the largest proportion of residents selected 'neither, don't know' (**40%**), however when looking at answers combined, **35%** specified numbers had increased, with the remaining **25%** observing a reduction in footfall in their local area.

Comparing this to the previous wave in winter 2020, the number of residents observing a decrease in visitors saw a significant decline of **-21%**, likely due to the vast differences in COVID-19 restrictions that were in place during winter, whereby people weren't able to visit local destinations and visitor attractions as freely. However, it will be vital that these perceptions continue to be monitored to aid with assessing the recovery of the tourism sector in the county.

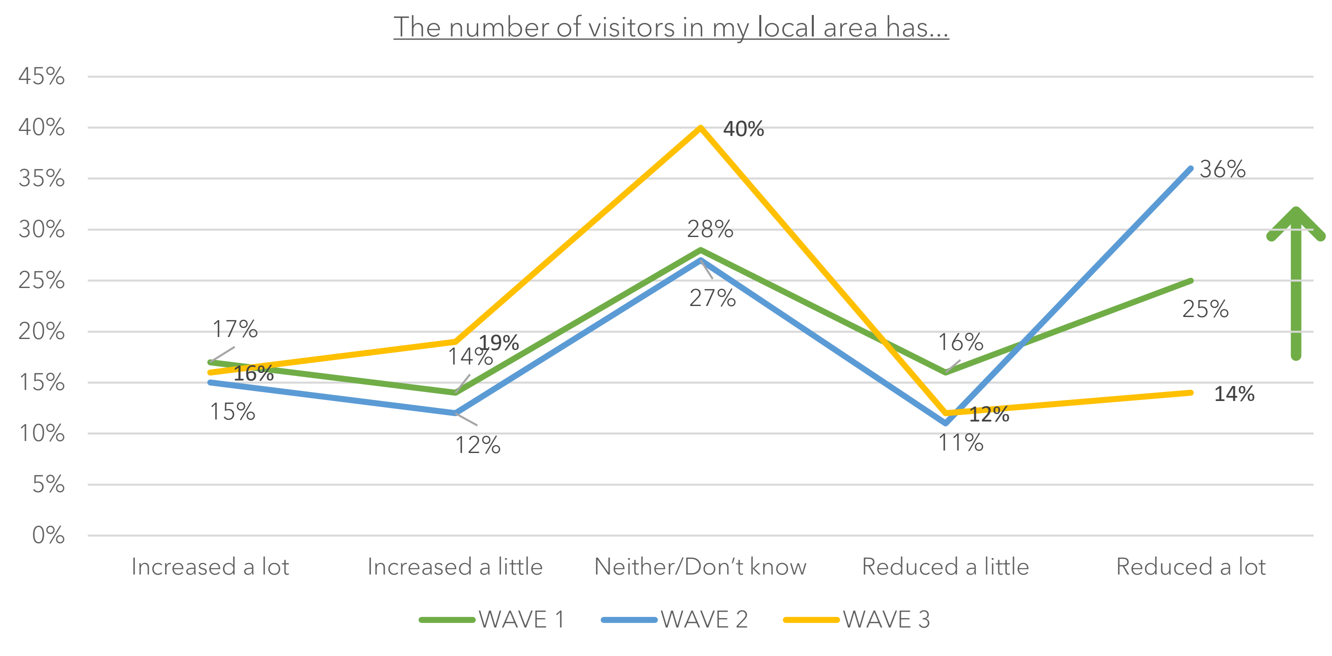


Figure 9: Graph showing changes to visitor footfall BASE=1251

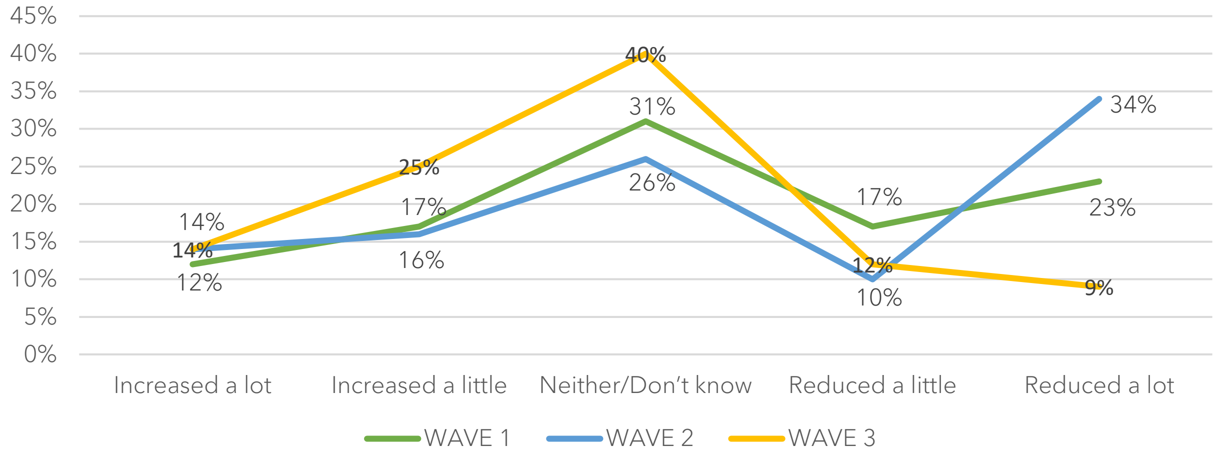
Participation and Availibility

The survey then presented respondents with a series of statements relating to the availability and participation with local attractions and recreational facilities. Firstly, in terms of the availability of recreational facilities and opportunities, in wave 3 the number of residents who specified these had increased was +12% higher compared to previous waves. Alongside this, 44% of residents felt the number of cultural attractions available to visit such as exhibitions and events had decreased, compared to 81% in wave 2 and 64% in the initial summer wave, a decrease of -28% compared to winter and -20% compared to the previous summer.

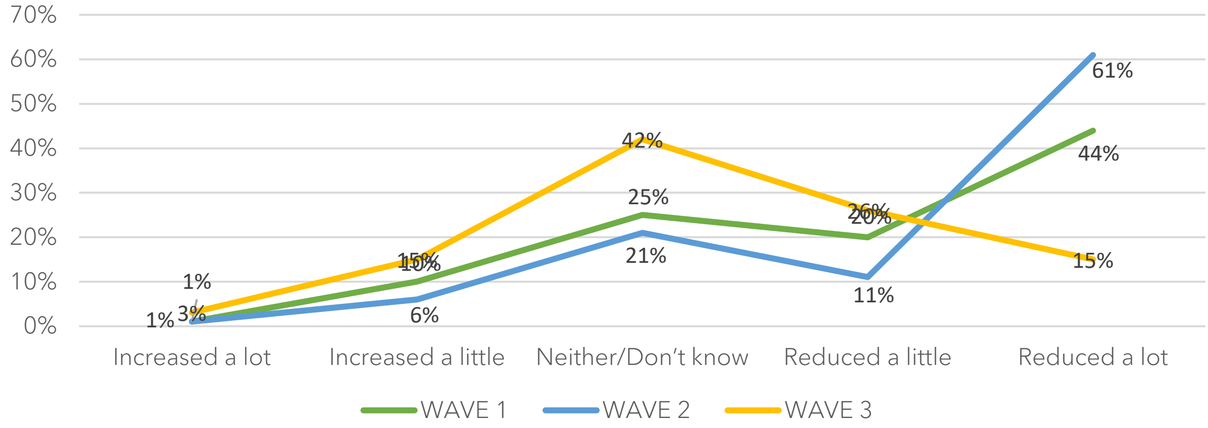
Subsequently, the survey also asked respondents about their participation and engagement with local attractions and activities. Results show that +9% more residents specified the number of locals using attractions and facilities had increased (39%), compared to wave 2 (30%), and +19% more compared to wave 1 (20%). Furthermore, when asked if the number of cultural and recreational activities residents had taken part in this summer increased or decreased, those specifying went up by +14% compared to the previous two waves (22% vs. 8%).

Overall, findings for these questions indicate that there is a growing trend in residents beginning to engage more with local facilities and attractions and perhaps a sense of growing consumer confidence following the pandemic. When comparing resident sentiment across waves, it is important to note that during winter 2020 there were a significant amount of additional COVID-19 restrictions in place, including various lockdowns and localised tiered systems. This, therefore will inevitably mean that the availability and participation locally will have increased into summer 2021, however looking at the trend across all three waves, this does demonstrate the recovery of the sector and resident engagement.

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



The number of cultural attractions available to visit (exhibitions, events) has...



INCREASE IN VISITORS

- Findings mirror trends observed previously that those who observed an increase in visitor numbers were more likely to state that there has been an increase in residents using local attractions and facilities and cultural sites.
- Similar to the previous wave, residents living in areas where their perceived main attraction is the beach/coast displayed the highest level of agreement that the number of visitors in their local area had increased (54%). However, when looking at percentage changes findings show that those who perceive their main attraction to be the countryside saw a -8% decline in agreement, while those living in areas where museums and historic sites are prominent saw an increase of +10%. Consequently, these findings may be a reflection of trends around consumer behaviour and government restrictions, in the sense that in winter visitors are more likely to explore open rural areas to comply with guidelines, whereas now museums and other indoor heritage sites are benefiting from restrictions being lifted.
- A higher proportion of residents living in the KDAONB observed an increase in visitors in summer, compared to countywide figures (46% versus 35% up by 11%), which was also observed in the previous wave indicating that residents living in the KDAONB are generally more likely to receive more visitors, given the beauty and appeal of the area in the county.
- While the majority of districts did observe an increase in visitors, the largest increase in visitor footfall in summer 2021, was observed in Folkestone and Hythe (+29%) and Thanet (+27%) followed by Canterbury (+19%).

DECREASE IN VISITORS

- As expected, mirroring winter 2020 results, findings show a correlation between a decrease in visitors and a decrease in the number of residents using local attractions and recreational facilities.
- Residents from Medway (43%) and Tunbridge Wells (37%) were most likely to have observed a decrease in visitor numbers, compared to all Kent respondents (26%). Residents from these districts were also most likely to state that the number of residents using local attractions and facilities had decreased as well.

Quality of Life

Looking further into the social impact of COVID-19, respondents were asked if the quality of life for residents has been affected. Findings show that **31%** of residents felt this had either 'reduced a little' or 'reduced a lot', although the largest proportion (**52%)** of residents selected 'neither/don't know'. When comparing results against those from previous waves, findings show a slight increase of **+4%** compared to wave 2 and **+6%** compared to wave 1.

Looking at findings for this question by residents' perceived main attraction, those who selected museums and historic sites saw the largest decline in those specifying their quality of life had decreased (**29%**), compared to wave 2 (**50%**). this was then followed by residents who perceived their main attraction to be the countryside, with **28%** specifying their quality of life had decreased compared to **46%** in wave 2. Furthermore, these findings indicate that residents situated in areas where these attractions are prominent had an increased quality of life during the most recent summer, which could be due to areas which have museum and heritage attractions beginning to reopen following restrictions in winter 2020. Alongside this, as previously stated in wave 2, those situated in rural areas may have experienced a decrease in quality of life in winter due to increased footfall, with consumers looking to explore open and outdoor areas, which may have shifted when visitors were able to explore other areas when businesses reopened.

A similar picture was also observed for those living in areas where the beach is a prominent attraction, with **35%** specifying their quality of life had decreased compared to **47%** in wave 2, which is most likely due to the fact that beaches are utilised more in the warmer summer months, which in turn increases local residents' quality of life. Finally, results for this question were also analysed by the type of area, with findings showing that those that lived in a city saw the largest improvement compared to wave 2, with an increase of **+13%** (**28%** vs. **15%**). Consequently, areas with heritage attractions and those within cities perhaps felt an improvement in quality of life in summer 2021 due to restrictions being lifted, which resulted in more local facilities and attractions being open.

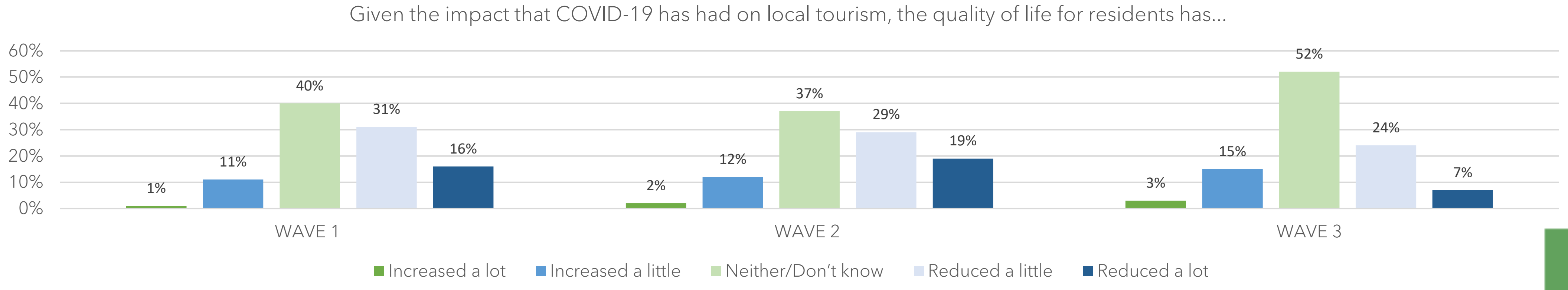


Figure 12: Graph showing the impact of COVID-19 on quality of life BASE=1251

Economic Risks Post COVID-19

Financial Impact of COVID-19 on Household

The survey also looked to gain an insight into how Kent residents have been impacted financially following the pandemic.

Firstly, respondents were asked to specify to what degree their household's financial situation has been affected. As illustrated in figure 13, the largest proportion (55%) of residents stated this had 'stayed the same', a finding that was also found in waves 1 and 2.

However, this was then followed by 31% specifying they are worse off monetarily since the pandemic, which is also consistent with both previous waves. However, when looking at the percentage of residents that stated their household finances had increased (15%), although this was on par with results from wave 2, this was +6% higher compared to the first summer wave in 2020.

Overall, although findings for this wave do mirror those from the previous two waves, there was an improvement observed in summer 2021, compared to the previous summer. Similar to wave 2, the improvement may be due to less restrictions being in place and local businesses being able to operate more freely.

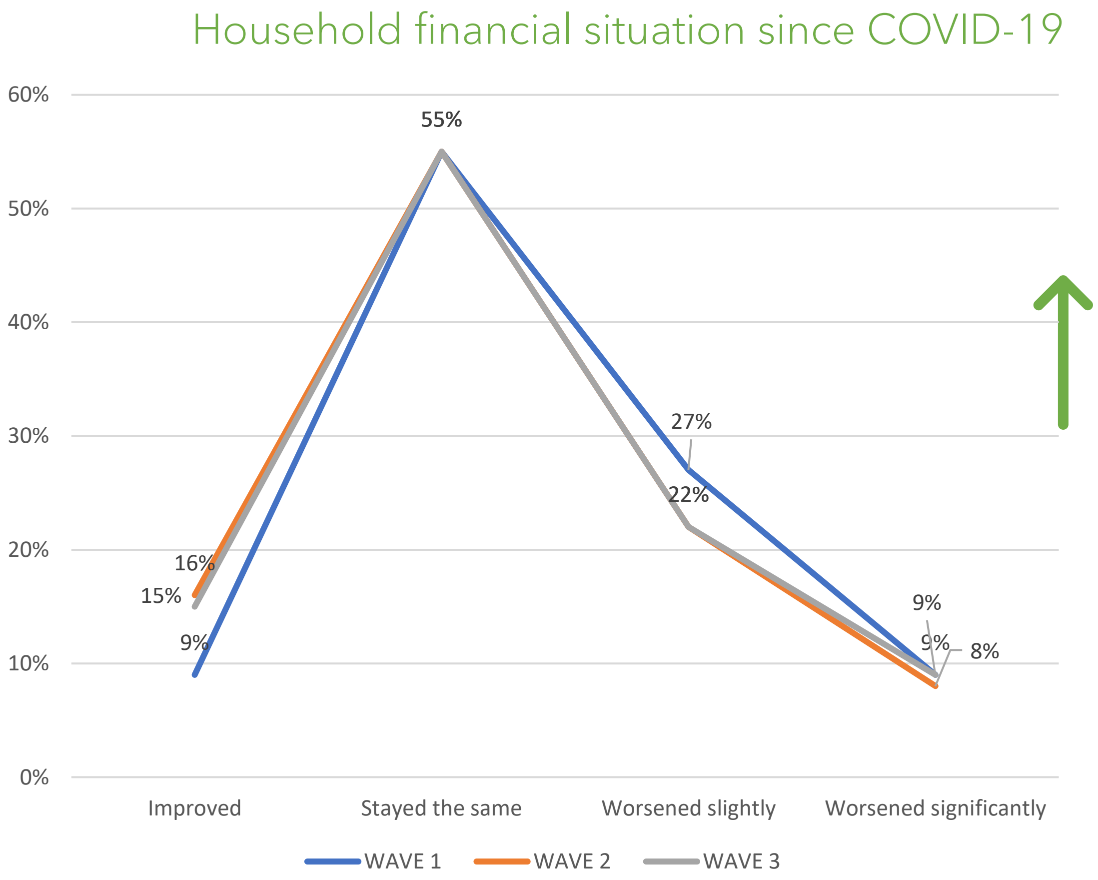


Figure 13: Graph showing the % of respondents and the impact on their household finances following COVID-19 BASE=1251

Local Investment & Infrastructure

The survey then looked to measure residents' sentiment on other economic factors facing their local area. When asked if local investment development and infrastructure spending is declining results from wave 3 show a -7% decline in agreement with this statement compared to wave 2, in addition to a -10% decline compared to the initial summer wave. This sentiment indicates that there is a trend around residents perception of local investment gradually beginning to increase overtime. Consequently, this may indicate that residents are becoming more aware of local projects and infrastructure developments due to funding and tourism activity, and as a result this shows a positive trend in terms of residents acknowledging the contribution tourism can bring to local development.

Transport Services

Respondents were then asked to rate their agreement with the statement 'local transport services are improving', with results showing a slight increase in agreement (+4%) compared to wave 2 and the initial summer wave (+5%), with 13% of residents agreeing this has improved. However, this still indicates that a considerable proportion of respondents did not agree with this statement, which does strongly indicate that this is an area for improvement and that local residents do feel the public transport services need improvement. Findings for wave 3 also show that residents who observed an increase in visitors to their area were more likely to have seen an improvement in public transport service, a point that was also highlighted in both previous waves . Overall, it is likely that areas which are more popular with visitors will benefit from better connectivity and increased public transport services, with many other areas and most likely those that are rural areas, not having as many services on offer. Again, this indicates that this is still an area for improvement and is something that will be of particular importance when looking to develop off season experiences, which will require reliance on the availability and reliability of public transport services within the county, to facilitate these visits, whilst continuing to fulfil a sustainable and low carbon- footprint agenda and having a close working relationship with local transport providers.

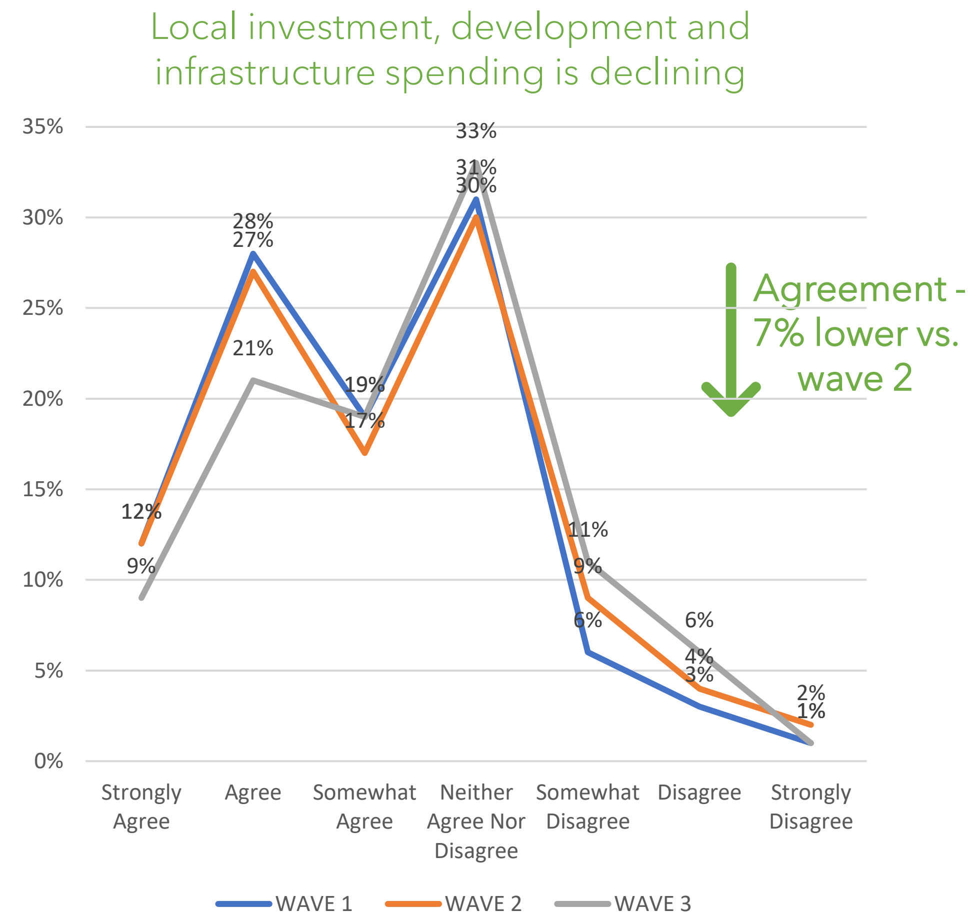


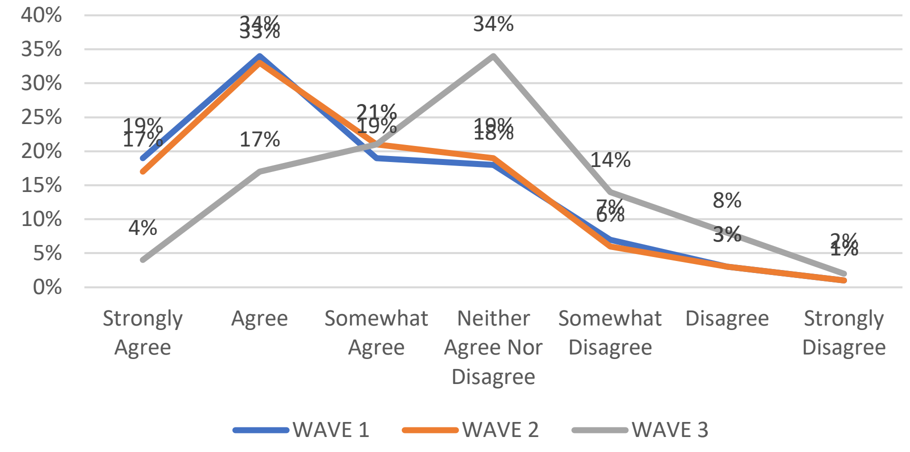
Figure 14: Graph showing the % of respondents for responses to the statement 'Local investment, development and infrastructure spending is declining' BASE=1251

Local Economy & Employment

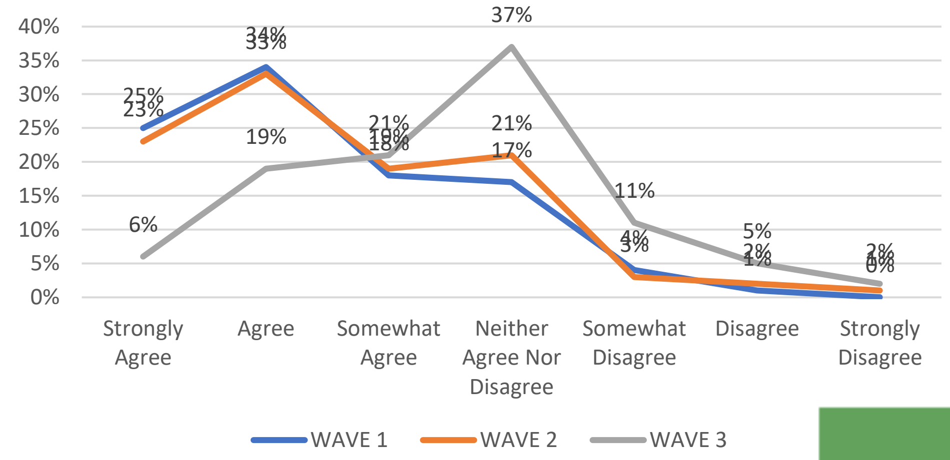
The survey then looked to assess perceptions around local employment and the visitor economy, and if they felt this was decreasing post COVID-19. Firstly, results show that agreement that local employment opportunities stemming from tourism are decreasing was **-29%** (**46%**) lower than in wave 2 (**75%**) and **-31%** lower compared to the initial summer wave (**77%**). Furthermore, these findings indicate that residents' perceptions around these benefits are increasing, which may be a result of the recovery of the sector with many more businesses being able to open following the lifting of restrictions. This may demonstrate an increase in employment opportunities, perhaps facilitated by additional funding streams as a result of the pandemic. To add to this, a similar picture was also observed when residents were asked if the local visitor economy was declining, with **42%** agreeing with this statement, a decrease of around -**29%** compared to both previous waves.

Collectively, this indicates that resident sentiment has seen a vast improvement overtime, indicating a strong trend of the recovery and growth of tourism, as a significant contributor to these areas. Furthermore, as highlighted in previous waves this sentiment may also have been enhanced due to the pandemic highlighting the impact of loss of tourism and the reliance the county has on the sector to facilitate a strong economy and local employment opportunities. It will also be important to continue tracking this trend over future waves of the survey, to help monitor further signs of recovery and resident sentiment.

The local visitor economy is declining



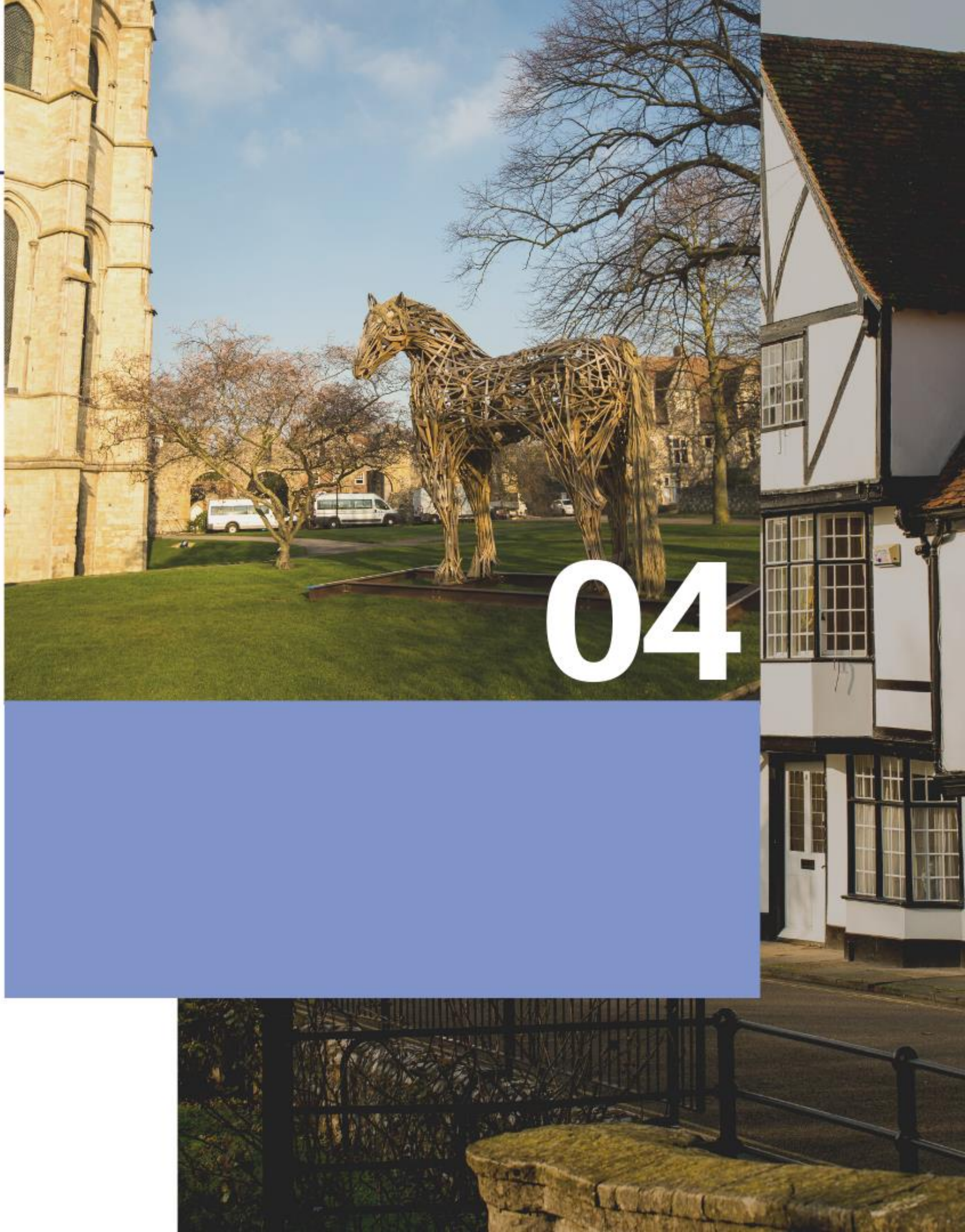
Local employment opportunities stemming from tourism are declining



Looking at other questions that did not differ greatly from the initial two waves, when asked if local infrastructure is improving for example public toilets, car parks, foot and cycle paths, in wave 3, this generated **20%** agreement among respondents which was also seen in the previous surveys. Moreover, as highlighted previously this is an area for improvement, with some residents feeling that local infrastructure is an area which needs addressing. Furthermore, when looking at some of the open ended comments later on in the survey, an area which emerged as a common theme was the need for public toilets and car parks to be improved.

KENT RESIDENTS SURVEY FINDINGS:

KEY IMPACTS OF TOURISM & OVERALL SUPPORT



04

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 it also captures more details as this was formatted as 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** – Tourism boosts the local economy	2	**Supporting jobs** - Increases employment opportunities
3	**Business benefits** - Supports local businesses	4	**Attracts investment & Improves facilities** – Increases infrastructure and local services and amenities
5	**Attractions & Events** – Range of attractions to visit and events on offer for locals to enjoy, including arts and cultural sites	6	**The Beach** – Choice of beaches for locals to enjoy and visit ↑
7	**Preservation of historical sites** – Helps to maintain and keep attractions open	8	**Quality food and drink** – Variety of pubs, cafés and restaurants on offer ↓
9	**The Countryside** – Quality of rural areas such as country parks, other countryside areas and cycle routes	10	**Promotes local area** - Increases interest in and visibility of the local area and attracts new and diverse audiences

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

Negative

1 **Litter/pollution** - Increased litter and mess left by tourists	2 **Parking** - Lack of available parking and increased costs
3 **Traffic** - Congestion and busy roads	4 **Anti-social behaviour** - Increased anti-social behaviour
5 **Damage to environment** – Harm caused to rural areas and natural habitats and wildlife	6 **Overcrowding** - Too many visitors and people in local area
7 **Increased prices** - Increased prices in the area as a result of tourism	8 **Lack of local investment and facilities**- Including attractions, local transport and toilet facilities
9 **Beach** - Increased pollution, overcrowding and inconsiderate behaviour on beaches in particular	10 **Town centre** - Concerns around empty shops, overcrowding in some places and a need for improvement in these areas

Additional Comments

Finally, the survey also gave residents the opportunity to leave any additional comments they might have about the impact of tourism on their local area, or regarding the answers they gave throughout the survey. The following diagram presents a sample of comments given by respondents, that capture the common themes identified when analysing responses.

"Kent is an amazing county with so much to offer and it should be promoted more. People are more inclined to think of Cornwall, Devon, Yorkshire as tourist destinations but we've much more to offer."

"I love to see people visiting Herne Bay as it brings the seafront to life. Feels like I'm on holiday too. Very pleased and proud to live here. Just hope the local shops in town will be well supported too."

"I've been learning lots about the history of where I live, historical buildings, local walks. It's been lovely seeing local wildlife and plants flourish over the past 18 months and finding new waking routes and taking lots of photos. It's been great for my mental health too."

"More should be done to encourage green tourism and travel, promote care of environment and make cycling/walking safer."

"We should encourage more Tourism be that with visitors from over the UK and Europe it would all help our businesses and restaurants."

"Its a positive thing but more should be done to promote attractions to locals as well as tourists."

"Need better public transport throughout my area and the county of Kent as whole."

"Tourism is essential for any area to thrive. Its a catch 22 where you want the Tourism to help the businesses and economic stability of the local area but you don't necessarily want the queueing traffic and packed beaches and busy countryside."

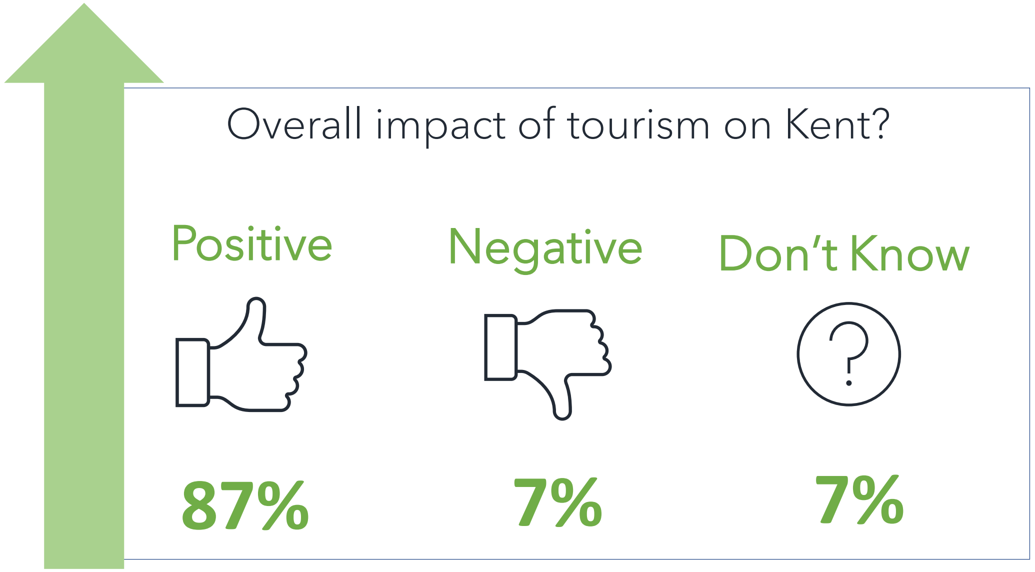
"Need to focus on sustainable eco-tourism."

"Promotional materials are required regarding the environment, leave only your foot prints."

Overall Support

Finally, the survey looked to gain an insight into respondents' overall feelings and support of tourism in their local area. As illustrated in figure 15, when asked to rate their agreement with the statement 'I support summer tourism in my local area', **85%** selected either 'strongly agree', 'agree', or 'somewhat agree', with the largest proportion (**39%**) selecting 'agree'.

Following this, respondents were asked what they felt the overall impact of tourism on Kent was, with results showing that the majority (**87%**) felt this was positive. Overall, results indicate that residents have a strong sense of support for tourism in their local area, with residents displaying a similar sentiment in the previous two waves.



BASE=1251

Resident support of summer tourism in their local area

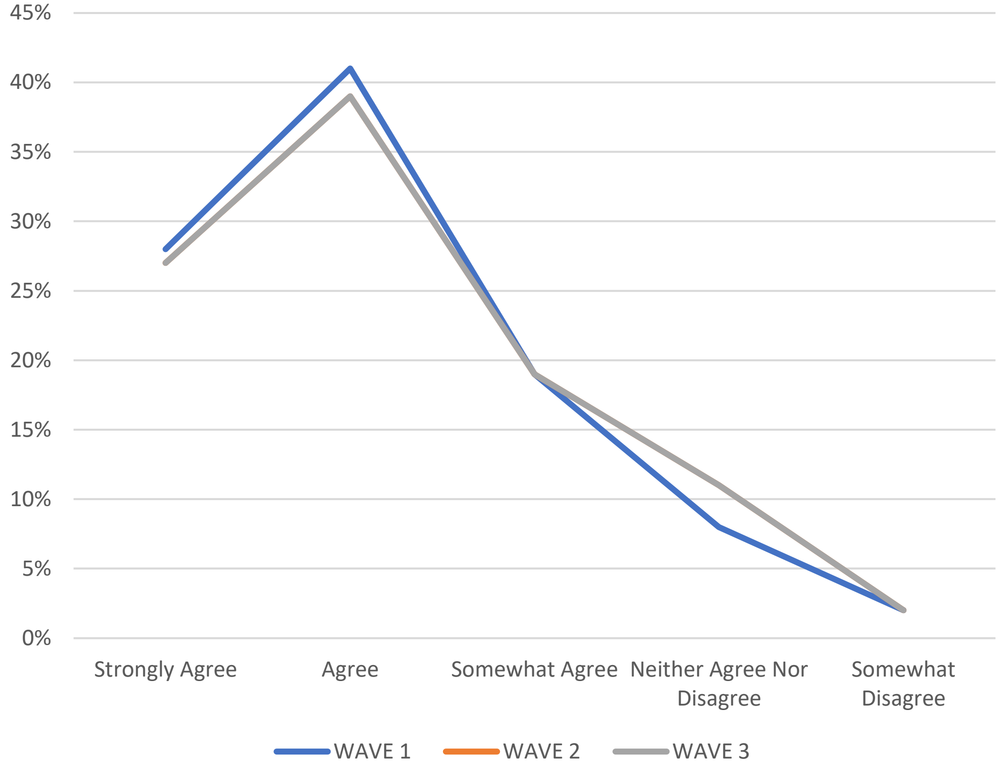


Figure 15: Graph showing the % of respondents and their level of agreement with the statement 'I support tourism in my local area' BASE=1251

Key Findings & Recommendations

Damage to the Natural Environment

Residents still feel that tourism can cause damage to the environment, although agreement was lower compared to winter 2020, although higher than the initial summer wave. Results show that agreement was highest among those who perceived their area's main attraction to be the beach, illustrating a shift back to views expressed in the initial summer wave. In contrast findings from wave 2 showed that those living in countryside areas expressed a higher level of agreement that tourism can damage the environment, potentially due to residents exploring more open and outdoor areas during restrictions. However, as expected, the correlation between environmental impacts and coastal areas by seasonality, is likely due to beaches being more popular in the warmer months and attracting an increase in visitor footfall.

The results also show that Kent Downs AONB residents were more likely to agree that tourism causes harm to the environment, which could be due to people living in natural areas being more conscious of these issues. Collectively, results indicate that across the summer waves, concerns around the environment is increasing and it will be important to continue to monitor this impact, particularly in coastal areas and those the KDAONB.

Local Economy and Employment Opportunities

Findings show that sentiment around tourism's contribution towards employment opportunities in the local economy is improving. This result is firstly likely to be a reflection of restrictions lifting and many more businesses being able to open. In addition this sentiment may also demonstrate an increase in employment opportunities perhaps facilitated by additional funding as a result of the pandemic, alongside illustrating the potential recovery of the sector. This steady increase indicates a strong improvement in overall residents' perceptions and shows a positive recovery trend and that tourism is a significant contributor to these areas, which may have been further highlighted by the loss of tourism and the reliance the economy has on the sector.

Local Prices

Residents were more likely to feel that tourism has increased prices locally, although this will have inevitably been influenced by the record high rise in inflation and petrol costs. However it will be important to continue to monitor this sentiment to see if this improves in future waves and to align this closely with national price increases.

Main Attraction

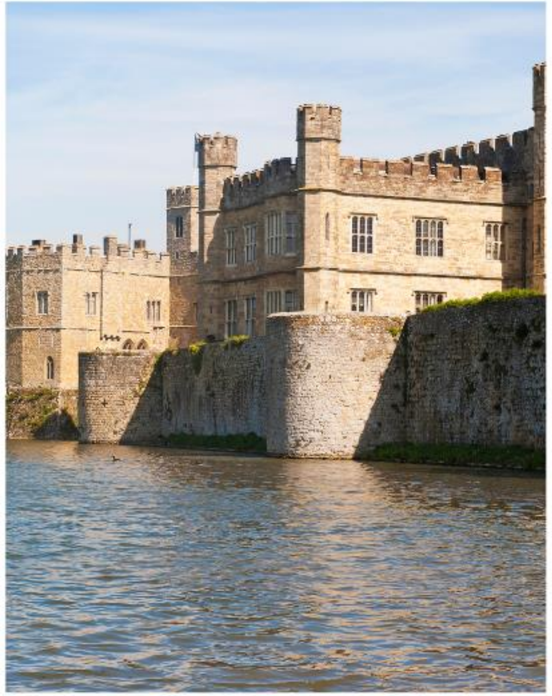
Looking at main attraction, results across all three waves indicate that the proportion of respondents selecting heritage sites is consistent across both seasons and therefore demonstrates the steady appeal and awareness of these attractions regardless of season. However, as expected the beach and coastal attractions were selected by a higher proportion of respondents in both summer waves, likely due to the increased appeal in the warmer summer months, while in winter the countryside was selected by a larger proportion of residents. All in all, this may demonstrate the appeal of the countryside in the off-season, alongside heritage sites throughout, while seaside areas are associated more with summer. Furthermore, this may help to inform the development of off-season activity and to utilise these attractions to increase visitation in these months, with the potential to also diversify the coastal offering in the off-season also.

Local Investment

Results showed that sentiment around tourism's contribution to local investment and development is steady, with results from wave 3 being +25% higher compared to the initial summer wave. Similar to the previous wave, this illustrates an area of vast improvement overtime, which should continue to be monitored, and may help to assess the impact of various local developments and ongoing projects.

Summer Activity

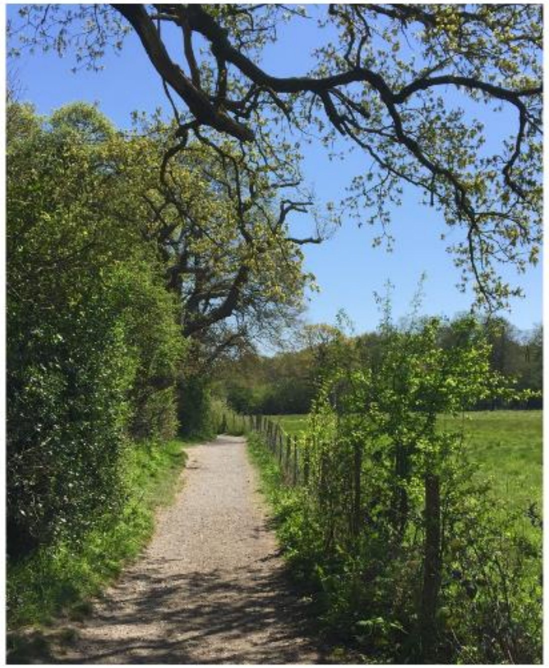
Overall, findings show that residents were more active in terms of travel, both within and outside of the county, reflecting the removal of restrictions and perhaps increased consumer confidence for some, most likely as a result of the rollout of the vaccination programme, which demonstrates a growing appetite for travel.



Visitor Presence & Local Engagement

Overall, the number of residents who observed a decrease in visitors saw a significant decline, likely due to the vast differences in COVID-19 restrictions that were in place during various times when surveys were conducted, whereby in summer 2021 residents were more able to freely visit attractions and local destinations. In addition, results show that the availability of local attractions and facilities and resident participation in these have increased significantly compared to winter 2020. Results also show a correlation between those that observed an increase in visitors and an increase in those specifying that the availability and participation with local attractions and facilities has increased.

Results also indicate that those living in areas where their perceived main attraction is beach were more likely to agree there are too many visitors during the summer months and that visitor footfall had increased, and in contrast those in countryside areas saw a slight decrease. Consequently, these findings firstly illustrate the prominence of coastal areas in the summer months and are also likely reflective of the lifting of COVID-19 restrictions, with some people returning to indoor attractions.



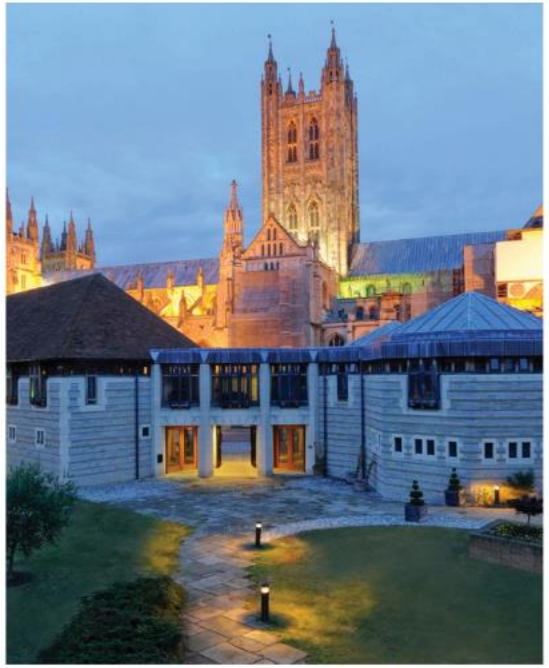
Resident Wellbeing

Insights indicate a slight decrease in resident satisfaction and optimism for the future, which may also be caused by the uncertainties around the pandemic and additional variants, with concerns around a potential increase in cases in the winter months to follow. Findings also indicate that during summer 2021, some residents may have experienced financial difficulties, and together with the uncertainty around the pandemic, this may have led some residents to feel less safe and more disconnected from their local area. The latter may also be a reflection of spending less time in their local area compared to winter, and therefore lessening their connection, with residents also feeling more peaceful and calmer in the off-season.

Results also showed that residents were less likely to agree they live in a beautiful area, although this was on par with the initial summer survey. Furthermore, this may indicate that residents may feel the area is more appealing in winter or could be due to increased time spent in the vicinity due to restrictions. However, residents living in rural areas alongside villages and within the Kent Downs AONB were more likely to express a sense of pride and contentment living in their local area, which not only highlights a potential link between these areas and wellbeing, but also further highlights the strength of Kent’s natural beauty.

Transport

Findings show a slight increase in agreement that local transport services are improving, however a considerable proportion of respondents still did not agree with this statement. Again, results show that those in areas with a higher footfall did benefit more from public transport services, however overall, there is still a need to work to continue to improve the availability of public transport services on offer. The need for this is also reinforced by the reliance of transport infrastructure to develop off-season activity and is also vital to continue to fulfil a sustainable agenda. To achieve this, a close working relationship with transport providers is essential and messaging around this should be incorporated in marketing activity and campaigns.



Parking Availability

Similar to previous waves findings indicate that perceptions around parking availability is declining, particularly among those in rural areas. Furthermore, this shows the need to focus activity and funding on both bettering parking facilities and on encouraging visitors and residents to utilise public transport networks where possible.

APPENDICES

05

In my local area in a typical summer/winter before Covid-19...									
Tourism preserves historic buildings and monuments	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	37%	40%	16%	3%	2%	1%	0%	93%	3%
WAVE 2	28%	41%	19%	7%	3%	2%	1%	88%	6%
WAVE 3	27%	43%	21%	6%	3%	1%		91%	4%
Tourism increases demand for local historical and cultural attractions	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	41%	44%	10%	3%	1%	1%	0%	95%	2%
WAVE 2	32%	44%	16%	5%	2%	1%		92%	3%
WAVE 3	33%	46%	15%	3%	2%	1%		94%	3%
Tourism increases availability of local recreation facilities/opportunities	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	28%	37%	21%	9%	4%	2%	0%	86%	6%
WAVE 2	21%	40%	21%	11%	4%	2%	1%	82%	7%
WAVE 3	18%	37%	24%	12%	6%	4%	1%	79%	11%
Tourism is harmful to natural places like the countryside or coastal areas	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	4%	7%	42%	16%	17%	11%	4%	53%	32%
WAVE 2	6%	13%	44%	16%	14%	6%	1%	63%	21%
WAVE 3	5%	15%	39%	19%	14%	6%	2%	59%	22%
Tourism limits parking spaces available to local people	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	17%	24%	30%	14%	7%	7%	2%	71%	16%
WAVE 2	17%	28%	28%	15%	7%	5%	1%	73%	13%
WAVE 3	24%	28%	26%	13%	6%	3%	1%	78%	10%
There are too many visitors in my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	3%	5%	8%	26%	19%	30%	10%	16%	59%
WAVE 2	5%	6%	11%	29%	18%	23%	8%	22%	49%
WAVE 3	4%	4%	10%	27%	21%	24%	9%	18%	54%
I like to meet visitors in my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	12%	35%	20%	27%	3%	3%	1%	67%	7%
WAVE 2	8%	32%	22%	29%	5%	3%	1%	62%	9%
WAVE 3	11%	29%	21%	29%	4%	4%	2%	61%	10%

BASE=1251

In my local area in a typical summer/winter before Covid-19...									
Tourism increases employment opportunities	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	43%	37%	12%	5%	2%	1%	0%	92%	3%
WAVE 2	28%	34%	17%	10%	6%	4%	2%	79%	12%
WAVE 3	32%	40%	16%	8%	2%	2%	1%	88%	5%
Tourism improves the local economy	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	49%	39%	8%	2%	1%	1%	0%	96%	2%
WAVE 2	36%	39%	15%	6%	3%	2%	1%	90%	6%
WAVE 3	38%	41%	15%	4%	2%	1%		94%	3%
Tourism improves local investment, development and infrastructure spending in the economy	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	8%	24%	21%	15%	9%	5%	18%	53%	32%
WAVE 2	24%	36%	20%	12%	5%	3%	1%	80%	9%
WAVE 3	23%	34%	21%	13%	5%	3%	1%	78%	9%
Because of tourism there are more public transport services available	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	7%	14%	15%	31%	16%	14%	3%	36%	33%
WAVE 2	7%	14%	15%	29%	18%	12%	5%	36%	35%
WAVE 3	8%	14%	13%	29%	18%	12%	7%	35%	37%
Tourism increases prices for local services and amenities	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	5%	16%	24%	30%	14%	11%	1%	45%	26%
WAVE 2	5%	19%	23%	33%	11%	7%	1%	47%	19%
WAVE 3	7%	19%	26%	31%	11%	5%	1%	52%	17%
Tourism reduces my ability to access local services and facilities	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	3%	6%	14%	25%	21%	27%	5%	23%	53%
WAVE 2	3%	9%	13%	27%	24%	20%	4%	25%	48%
WAVE 3	4%	9%	17%	28%	19%	18%	5%	30%	42%

BASE=1251

Tourism and wellbeing									
Overall, I am very satisfied with my life	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	29%	48%	16%	4%	2%	1%	1%	93%	4%
WAVE 2	26%	49%	16%	5%	3%	1%		91%	4%
WAVE 3	25%	46%	16%	7%	4%	2%	1%	87%	7%
Overall, I am happy with my lifestyle	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	28%	48%	17%	4%	2%	1%	0%	93%	3%
WAVE 2	24%	51%	17%	4%	4%	1%		92%	5%
WAVE 3	23%	47%	17%	6%	4%	2%	1%	87%	7%
Overall, I feel very excited about my future	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	12%	33%	25%	20%	7%	3%	1%	70%	11%
WAVE 2	16%	36%	23%	17%	6%	2%	1%	75%	9%
WAVE 3	13%	32%	20%	19%	9%	4%	3%	65%	16%
Overall, I feel calm and relaxed	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	13%	36%	23%	14%	10%	3%	1%	72%	14%
WAVE 2	14%	38%	25%	11%	9%	3%	1%	77%	13%
WAVE 3	14%	35%	22%	13%	10%	4%	3%	71%	17%

BASE=1251

Summer/Winter tourism and emotional connection									
Having visitors around helps me feel more strongly connected to my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	8%	24%	19%	32%	9%	6%	2%	51%	17%
WAVE 2	6%	23%	20%	33%	10%	7%	2%	49%	19%
WAVE 3	6%	22%	18%	34%	9%	8%	3%	46%	20%
Summer/Winter tourism would not be a reason for me to move away from my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	37%	40%	8%	8%	4%	3%	1%	85%	8%
WAVE 2	40%	39%	6%	9%	2%	2%	1%	85%	5%
WAVE 3	32%	39%	9%	10%	5%	3%	2%	80%	10%
I feel safe in my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	19%	48%	20%	6%	5%	2%	1%	87%	8%
WAVE 2	16%	49%	19%	6%	6%	2%	1%	84%	9%
WAVE 3	16%	44%	22%	8%	7%	2%	2%	82%	11%
I feel financially secure living here	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	16%	43%	23%	10%	5%	2%	1%	82%	8%
WAVE 2	15%	45%	20%	11%	5%	3%	1%	80%	9%
WAVE 3	13%	40%	21%	12%	8%	4%	3%	74%	15%
I dislike living here	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	1%	1%	4%	6%	10%	36%	43%	6%	89%
WAVE 2	1%	3%	5%	8%	10%	34%	39%	9%	83%
WAVE 3	1%	2%	4%	8%	11%	34%	39%	7%	84%
My local area is tranquil, peaceful and calm	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	10%	26%	33%	14%	11%	4%	1%	69%	16%
WAVE 2	10%	30%	30%	14%	12%	4%	2%	70%	18%
WAVE 3	8%	25%	30%	15%	14%	6%	3%	63%	23%
I live in a beautiful area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	29%	33%	20%	9%	6%	2%	1%	82%	9%
WAVE 2	30%	35%	21%	7%	5%	2%	1%	86%	8%
WAVE 3	26%	33%	21%	10%	5%	3%	1%	80%	9%
Tourism protects and enhances the natural environment	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	7%	20%	28%	23%	15%	5%	1%	55%	21%
WAVE 2	5%	18%	28%	26%	16%	6%	3%	51%	25%
WAVE 3	5%	16%	24%	29%	16%	7%	3%	45%	26%

BASE=1251

Social and cultural risks (post-covid)							
The number of visitors in my local area has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot	Increased	Decreased
WAVE 1	17%	14%	28%	16%	25%	31%	41%
WAVE 2	15%	12%	27%	11%	36%	27%	47%
WAVE 3	16%	19%	40%	12%	14%	35%	26%
The number of residents using local attractions and facilities has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot		
WAVE 1	12%	17%	31%	17%	23%	29%	40%
WAVE 2	14%	16%	26%	10%	34%	30%	44%
WAVE 3	14%	25%	40%	12%	9%	39%	21%
The number of cultural attractions available to visit (exhibitions, events) has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot		
WAVE 1	1%	10%	25%	20%	44%	11%	64%
WAVE 2	1%	6%	21%	11%	61%	7%	72%
WAVE 3	3%	15%	42%	26%	15%	18%	41%
Given the impact that COVID-19 has had on local tourism, the quality of life for residents has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot		
WAVE 1	1%	11%	40%	31%	16%	12%	47%
WAVE 2	2%	12%	37%	29%	19%	14%	48%
WAVE 3	3%	15%	52%	24%	7%	18%	31%
The availability of recreation facilities and opportunities has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot		
WAVE 1	1%	5%	24%	36%	35%	6%	71%
WAVE 2	1%	5%	20%	26%	48%	6%	74%
WAVE 3	3%	15%	42%	31%	9%	18%	40%
This summer/winter, the number of cultural and recreational activities I have taken part in has...	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot		
WAVE 1	1%	6%	10%	20%	64%	7%	84%
WAVE 2	2%	6%	11%	14%	67%	8%	81%
WAVE 3	4%	18%	20%	30%	28%	22%	58%

BASE=1251

Economic risks (post-covid)									
Local employment opportunities stemming from tourism are decreasing	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	25%	34%	18%	17%	4%	1%	0%	77%	5%
WAVE 2	23%	33%	19%	21%	3%	2%	1%	75%	6%
WAVE 3	6%	19%	21%	37%	11%	5%	2%	46%	18%
The local visitor economy is declining	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	19%	34%	19%	18%	7%	3%	1%	72%	11%
WAVE 2	17%	33%	21%	19%	6%	3%	1%	71%	10%
WAVE 3	4%	17%	21%	34%	14%	8%	2%	42%	24%
Local investment, development and infrastructure spending is declining	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	12%	28%	19%	31%	6%	3%	1%	59%	10%
WAVE 2	12%	27%	17%	30%	9%	4%	2%	56%	15%
WAVE 3	9%	21%	19%	33%	11%	6%	1%	49%	18%
Local transport services are improving	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	0%	3%	5%	45%	20%	17%	10%	8%	47%
WAVE 2	1%	3%	5%	37%	22%	19%	13%	9%	54%
WAVE 3	1%	5%	7%	35%	24%	16%	14%	13%	54%
Local infrastructure is improving (e.g. public toilets, car parks, playgrounds, footpaths, cycle paths)	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	1%	4%	12%	26%	27%	19%	11%	17%	57%
WAVE 2	1%	5%	13%	24%	24%	21%	13%	19%	58%
WAVE 3	1%	6%	13%	27%	24%	17%	13%	20%	54%

BASE=1251

Impact of covid on emotional conncection to local area (post-covid)									
I feel more strongly connected to my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	Agreement	Disagreement
WAVE 1	14%	26%	25%	26%	5%	4%	1%	65%	10%
WAVE 2	14%	29%	22%	25%	5%	4%	2%	65%	11%
WAVE 3	12%	24%	21%	31%	5%	5%	2%	57%	12%
I will not move away from my local area	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	33%	30%	11%	14%	5%	5%	1%	74%	11%
WAVE 2	30%	32%	11%	14%	5%	5%	3%	73%	13%
WAVE 3	26%	27%	14%	18%	7%	5%	4%	67%	16%
I feel estranged living here	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	1%	2%	7%	16%	14%	35%	27%	10%	76%
WAVE 2	2%	3%	8%	17%	12%	34%	26%	13%	72%
WAVE 3	2%	3%	7%	17%	13%	33%	23%	12%	69%
I feel safer and more secure living here	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	12%	26%	20%	31%	7%	4%	1%	58%	12%
WAVE 2	8%	28%	19%	33%	8%	4%	1%	55%	13%
WAVE 3	8%	21%	19%	38%	9%	4%	2%	48%	15%
I dislike living here	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	2%	2%	4%	8%	9%	33%	43%	8%	85%
WAVE 2	2%	3%	5%	9%	9%	31%	40%	10%	80%
WAVE 3	2%	2%	6%	10%	10%	31%	39%	10%	80%
My local area is more tranquil, peaceful and calm	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree		
WAVE 1	5%	19%	25%	29%	12%	8%	3%	49%	23%
WAVE 2	7%	22%	25%	24%	11%	7%	3%	54%	21%
WAVE 3	6%	15%	18%	33%	15%	9%	4%	39%	28%

BASE=1251

This research report has been produced by

VISIT KENT BUSINESS GARDEN of ENGLAND

Kent Downs Area of Outstanding Natural Beauty

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

Interreg France (Channel Manche) England EXPERIENCE

EUROPEAN UNION European Regional Development Fund