



Culture Kent, a Cultural Destinations Project, is led by Turner Contemporary in partnership with Visit Kent, funded by Arts Council England and Visit England.

Culture Kent Research- Report 3 Consumer Perspectives



Turner Contemporary, Margate. Image courtesy of Visit Kent



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CULTURE KENT RESEARCH REPORT 3- CONSUMER PERSPECTIVES

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2 CONTEXT

2.1 HOW DOES THE RESEARCH RELATE TO THE WIDER CULTURE KENT PROJECT?

Culture Kent is a three-year project led by Turner Contemporary and funded by Arts Council England and VisitEngland, as part of the *Cultural Destinations* programme. The programme was launched to enable arts and cultural organisations to work in partnership with destination organisations to increase their reach, engagement and resilience through working with the tourism sector (www.artscouncil.org.uk).

Culture Kent aims to:

- Showcase Kent’s cultural assets and **extend its reach** by attracting new audiences
- **Create new strategic relationships** between the cultural and tourism sectors in order to drive economic growth
- **Develop the information and knowledge core** that strengthens the Kent cultural tourism offer.¹

The achievement of these targets requires research and intelligence to develop the ongoing project and to provide a legacy for future work on cultural tourism in Kent. This supports the *Cultural Destinations* programme aims to ‘build partnership capacity in the cultural and visitor economy sectors’ to ensure future ‘commitment from public and private sector partners to continue working in partnership to support the growth of the local visitor economy... beyond the life of the project.’²

A two-year research programme has been commissioned to provide research and evidence required by Culture Kent to help the project to achieve key outcomes. Figure 1 below sets out the research framework, identifies the four areas of work (work packages A-D) and indicates how they relate to the overall aims of the Culture Kent project.



Figure 1: Culture Kent Research Framework

¹ <https://culturekent.net/>

² www.artscouncil.org.uk

2.2 BRIEF SUMMARY OF THE EVIDENCE REVIEW

2.2.1 How can the cultural tourism offer be defined, in terms of product, destination and experience?

VisitBritain’s overview of culture and heritage (VisitBritain, 2010) highlights the importance of ‘history and culture’ in Britain’s tourism brand, but points out that it can be difficult to separate culture and heritage in the mind of the consumer:

‘Britain’s culture and heritage offering is expansive and exists in many different forms such as built/historical heritage, popular culture, living culture, shared culture, cultural events, culinary culture, and cultural products to name but a few’ (VisitBritain, 2010:4).’

A number of reports (e.g. Culture24, 2012; Lehman *et al*, 2014;), identify that category distinctions such as culture, arts, and heritage are of little use in explaining the actual behaviour and expectations of cultural tourists, and owe more to the professional orientations of specialists and professionals working in the sector. The type of cultural experience demanded by cultural tourists is wide-ranging, and crosses specialist boundaries.

Turning a *creative place* into a *cultural destination* is largely a matter of bringing out the essential qualities and features of the area and making them accessible to the visitor. Applications such as *The Creative Tourist* (which grew out of the Manchester Festival 2007) have demonstrated the role internet and mobile technologies can play in guiding the cultural tourism experience and bringing about a sense of place, meeting the growing demand for spontaneous and authentic cultural experiences by directing visitors to lesser-known cultural attractions and ‘alternative’ venues (Palmer 2013).

The cultural destination is a networked space delivering a total experience to visitors that helps them understand a location and its people, through history and contemporary culture.

This above working definition was created based on the extensive research done in the evidence review. It highlights the importance of the cultural tourism supply chain to the cultural destination. Of particular relevance to Culture Kent is the focus on the way in which the supply chain connects public, private and third sectors and communities, with different kinds of space – including museums, visitor attractions, seafronts, high streets and cultural routes – and a range of technical specialisations and functions. This illustrates that new kinds of partnership and collaborative relationships, based around location and proximity, rather than sectoral identification, play a crucial role.

2.2.2 How can cultural tourists be profiled, with special references to their decision making, motivations and behaviour?

VisitEngland’s review of domestic leisure trends (Trajectory global, 2013), reveals several trends that are particular relevant to the cultural tourism consumer. These include; increasing time pressures and responsibilities; a focus on quality time and ‘treats’; a move to multi-generational holidays; a shift from exposed consumption to achieving social status, through creative tourism and hobbies. Accompanying these trends is the shift, already noted, towards more experiential engagement with destination culture, and a focus on the interaction of cultural tourism ‘providers’ and ‘consumers’ in the ‘co-creation’ of experience (Jovicic, 2016:605), which is identified as an important element in differentiating destinations (Cetin and Bilgihan, 2016).

The work of McKercher and Du Cros (2003), (initially developed in McKercher, 2002), has been influential in expanding the categories of cultural tourists to reflect the relative importance of culture in the decision to visit a destination (level of engagement with culture) and the depth of experience sought (from shallow to deep). The resulting ‘Matrix of cultural tourist types’ (Figure 2) identifies five cultural tourist types, which will be further analysed in a Kent context later in the report.

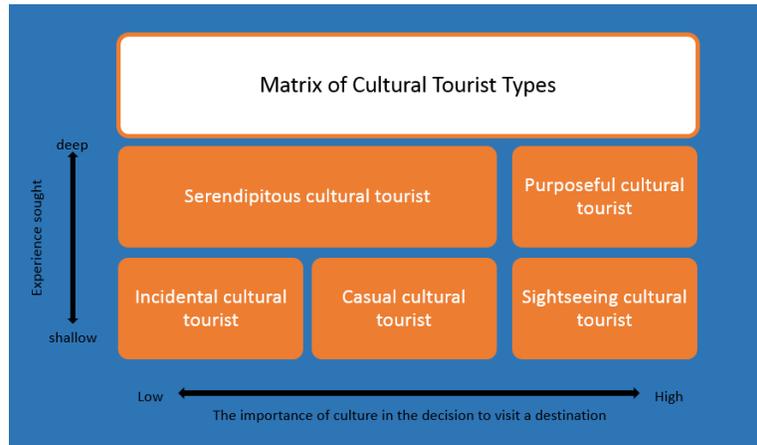


Figure 2: Matrix of Cultural Tourist Types

Source: McKercher (2002)

According to Smith (2016: 35) ‘Du Cros and McKercher (2015) suggest that, in most cases, the market is dominated by casual and incidental cultural tourists and that the purposeful segment is the smallest’. The experience of London, however, has been that whilst *Serendipitous* and *Sightseeing cultural tourists* are considered the ‘bedrock of London’s visitor economy’, a substantial growth in purposeful cultural tourist numbers has also been identified (Mayor of London, 2015).

The recognition that cultural tourism can mean different things to different people – and that a large proportion of potential consumers may not actually perceive themselves as cultural tourists at all – has significant implications for identifying and communicating with target markets, and the way that culture/arts are reflected in marketing communications.

This is an important issue to follow up within the context of the Culture Kent Research Programme: if cultural tourist types for whom culture plays a more secondary role are, in fact, easier to develop into loyal markets, this represents an attractive proposition for the region, suggesting the requirement for a varied cultural programme at the destination, augmented by ‘an appealing atmosphere of a lively and interesting place to visit, repeatedly attracting short break visitors mainly from the domestic and geographically closest markets’ (Kastenholz *et al*, 2013:354). Thus, it is important to understand the diverse range of behaviors and experiences of those who do and do not class themselves as cultural tourists but who still engage with the cultural/arts offer whilst at a destination.

3 METHODOLOGY

The final strand of the Culture Kent research project was a consumer survey, which focused on gathering the views of domestic consumers. The aim of the survey was to explore the awareness of Kent as a cultural destination and to develop an understanding of the experiences of cultural tourists within the destination and the visitor journey. The survey looked to explore the motivations, perceptions and demographics of both existing and potential cultural tourists to Kent. The findings and recommendations from this report will provide the tourism and cultural/arts sectors with an enhanced understanding and the evidence to develop their offer to tourists, based on their interests, and provide more meaningful links between the tourism and cultural sector. The report also takes into account findings from previous Visit Kent and VisitEngland reports, to enrich the context of the findings, in addition to looking at visitor figures to Kent from the 2016 Economic Impact Cambridge Model.

3.1 WIDER VISITOR PERCEPTION TRENDS

By working the following visitor perception trends into strategic planning, it will empower stakeholders to set more accurate goals, leading to better management and increased visitation.

- Past perception research and wider visitor studies showed that **the views, perceptions and motivations of holiday makers change slowly**. This creates a gap between stakeholders’ vision and visitors’ ability to perceive it, especially if extensive changes to a destination and its positioning take place. Stakeholders responsible for building a wider sense of place need to factor these elements into timescales, development and communications.
- National studies also highlight a common challenge across England’s destinations – **the task of identifying the uniqueness of destinations**. This is a challenge not only for international visitors, but also for domestic ones, who find it difficult to distinguish the appeal of one destination compared to another. One obvious exception is London, which has a very strong identity engraved in the minds of holiday makers.
- Another factor worth taking into account is **the proximity bias among holiday makers** to visit destinations that are either geographically close or easily accessible as a result of transport links. Existing knowledge reveals that the popularity of a destination diminishes as distance from visitors’ homes increases.

3.2 SAMPLE

The data was gathered using an online panel to reduce bias in the sample, assessing respondents that Visit Kent/Culture Kent had not necessarily been in touch with previously. This generated 770 responses, with a fair distribution of respondents by age, gender and origin. Through a filtering quota, the survey was completed by visitors from London and the Home Counties, and therefore the results are only representative of the counties selected. Please see a copy of the survey in **Appendix 1**. Furthermore, the survey looked to identify and examine the views of the three groups in the table below. When asked for their opinions on Kent, Kent residents were advised to answer the question from a visitor’s perspective.

Existing Kent cultural tourists	Those that already participate in the cultural tourism offer in Kent, looking at what their motivations and drivers are for visiting cultural organisations.
Existing Kent tourists	Those visiting Kent but do not currently engage with the cultural sector.
Potential cultural tourists	Those who engage with cultural activities and organisations, but have not visited Kent.

Initially, the survey looked to identify respondents and place them, based on their chosen responses, within one of the three pre-defined tourist groups. This was carried out with the use of two filter questions, firstly by asking respondents to select their main motivation when choosing a place to visit in the UK, from a list of both cultural and leisure-based activities. They were then asked if they have visited Kent in the last three years for a day trip/short break/longer holiday. As a result, respondents were grouped, allowing anyone that has either displayed an interest in leisure but had not visited Kent, or those who had not taken a trip in the UK in the last three years be removed from the sample. The diagram below illustrates this filtering process (Figure 3).

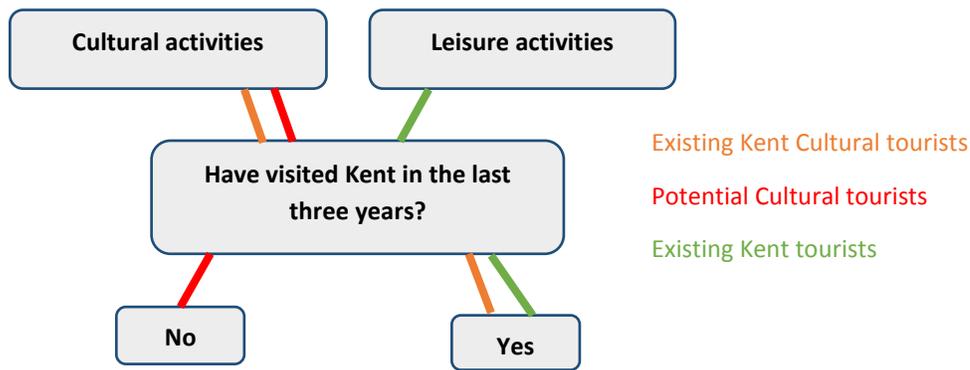


Figure 3: Diagram showing the filtering process used to group respondents

When looking at the responses from each group regarding the main motivations for choosing a place to visit, those defined as *existing Kent cultural tourists* most commonly selected ‘museums’ (42%) and ‘go to a festival’ (17%). The majority of those that were classed as *potential cultural tourists* also selected ‘museums’ (39%), followed by ‘go to the cinema’ (17%). Finally, when looking at those respondents classed as *existing Kent tourists* the most popular motivation was ‘go to a visitor attraction’ (48%), which was then followed by ‘walking/cycling’ (19%). Although the two cultural groups differed slightly in terms of motivations, it is apparent that museums are a major influencer with regards to destination choice.

Following the initial filtering questions, for the remainder of the survey it was clarified to respondents that cultural activities are seen to cover visits to a gallery, museum, theatre, cinema, festival and concert.

This report is based on findings using a very robust sample size. However, there are several methodology limitations with regards to the survey structure and the categorisation of respondents that should be taken into account. The necessary initial filtering process that was used to categorise respondents into tourist groups, meant that

respondents were potentially confined to one choice and thereafter are classed as either a cultural or non-cultural tourist. In addition, throughout the report, references are made to additional research findings conducted by both Visit Kent and VisitEngland. Although these are used to compare similar findings, it should be noted that these results are not directly comparable, as each study is based on different sample sizes, with differences in both variables and question structure. Concerning findings from the 2016 Economic Impact Cambridge Model, results are based on overall visits and are not representative of visitors for cultural purposes.

4 DEMOGRAPHICS

The survey assessed the demographics of respondents looking at age, gender and region of origin. Whilst gender was evenly distributed, it can be observed from Figure 4 that the majority of *existing Kent cultural tourists* were aged 25-34 (36%), while the largest proportion of *existing Kent tourists* were aged 65 and over (29%).

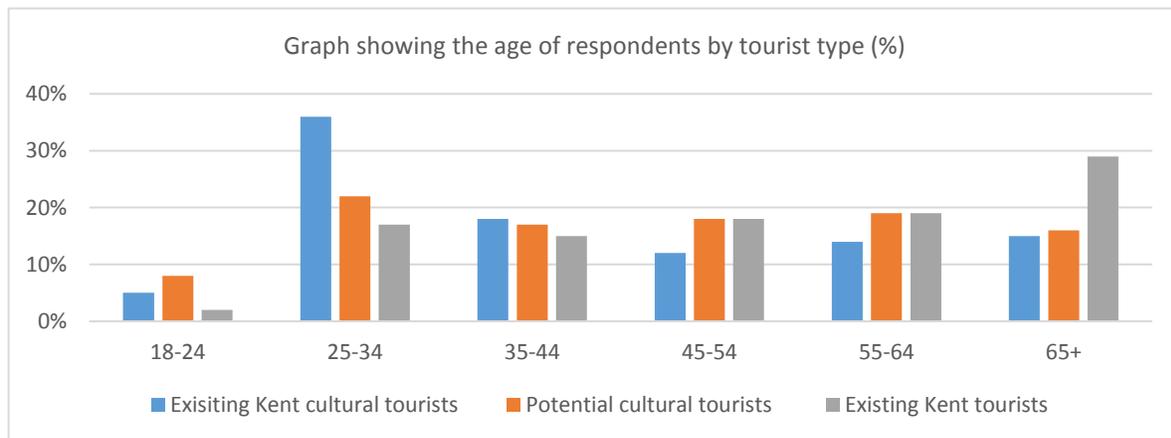


Figure 4: 'Please select your age group'

This is consistent with a Kent destination report published by VisitEngland (2017), which highlighted that Kent is beginning to attract a younger audience, especially when compared to the national average. Those classed as *potential cultural tourists* were more evenly spread, although the highest proportion fell in the 25-34 years age bracket (22%).

Respondents were asked to select their region of origin, which included London and home counties, with the majority of all respondents originating from London (44%), followed by Kent (15%). These findings were mirrored when looking at *existing Kent cultural tourists* and *existing Kent tourists*. However, with the exception of London, the highest number of *potential cultural tourists* were from Essex (12%).

5 INFLUENCERS AND SOURCES OF INSPIRATION

Respondents were asked to select the top three factors that influence them when choosing a place to visit. 'Beautiful countryside' (60%), 'range of visitor attractions' and 'beautiful coastline' (both 47%) were the most frequently cited factors from all respondents. This was also consistent when looking at the top three factors cited by each tourist group, although the order of importance differed slightly.

When assessing answers by ranking, *existing Kent cultural tourists* and *potential cultural tourists*, cited the factors previously mentioned, with ‘beautiful countryside’ rated most highly, which was then followed by ‘range of visitor attractions’ and ‘beautiful coastline’ among both groups. However, in the case of *existing Kent tourists*, ‘beautiful coastline’ (62%), was rated more highly compared to ‘range of visitor attractions’ (53%).

This question also included cultural aspects, including ‘range of culture/arts venues’, selected by 32% of all respondents, and ‘range of theatres and cinemas’ (9%), as potential influencers. Findings indicated that both cultural tourist groups ranked these more highly than *existing Kent tourists*, showing consistency with their primary motivations. With the ‘range of culture/arts venues’ rated as the fourth most influential factor among both cultural groups, particularly among *potential cultural tourists* (39%). However, in the case of *existing Kent tourists*, ‘quality of food and drink’ (39%) was selected as their next most influential factor.

When looking at those groups who had visited to Kent in the last three years, it could be suggested that factors including; beautiful countryside and coastline and range of visitor attractions, are qualities that Kent boasts as a place to visit., deeply rooted as the county’s unique selling points. In addition, 4% of all respondents answered ‘other’ to the above question, which included; transport links, wildlife and the cost of travelling.

The top influencers for *existing Kent cultural tourists* and *potential cultural tourists* included countryside and coastline, indicating that although their primary motivation was initially classified as ‘cultural’, they are more inclined to perceive culture as part of a wider mix of activities, but are drawn to destinations which offer beautiful countryside and coastlines.

This illustrates the diverse and complex nature of the cultural tourism offer in the minds of tourists, with cultural activities from their perspective going beyond the boundaries of venues, such as galleries and museums, into wider destinations, which visitors classify as cultural. It shows that those who are motivated by culture also have the desire to visit destinations that provide an attractive natural setting.

Moving onto the process of destination selection, the survey asked respondents to select which sources of information inspire them when choosing a destination to visit. Among all respondents, the top three sources included; ‘friends and relatives’ (50%), ‘travel guide websites’ (35%) and ‘special offers and promotions’ (34%), as seen in Figure 5.

In the case of *potential cultural tourists*, ‘friends and relatives’ (48%) was once again the most prevalent response. This was followed by ‘travel review websites’ (34%) and ‘an article in a magazine or newspaper’ (32%). Looking at the different sources of information used by visitors and potential visitors, this highlights not only which channels non-visitors respond to, for future marketing activities and communications, but also demonstrates which channels can be used to effectively target current visitors.

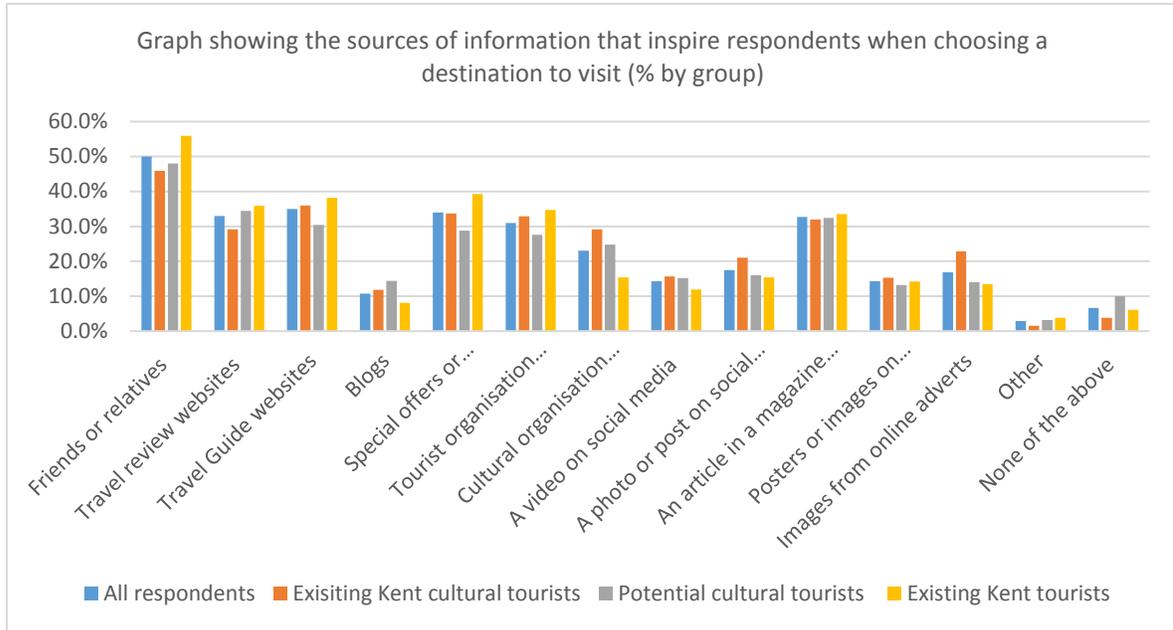


Figure 5. 'What sources of information inspire you when choosing a destination to visit?'

Links to Matrix of Cultural tourist types- The most popular source of inspiration was 'friends and relatives' for each cultural tourist type. However, for *purposeful cultural tourists*, this was followed by 'travel guide websites'. For both *sightseeing and casual cultural tourists*, the second most popular source of inspiration was 'special offers/promotions'. These channels can therefore be utilised to develop targeted experiences and effective marketing communications. (See Figure 2)

6 PARTICIPATION IN CULTURAL ACTIVITIES

6.1 ACTIVITIES NORMALLY UNDERTAKEN VS. PRIMARY MOTIVATION

Respondents were asked to select up to three activities they normally like to do as part of a day trip or short break/longer holiday. Findings from all respondents show that the top three activities included; 'to explore the countryside' (36%), 'visit a heritage venue (35%) and 'go to a restaurant/pub' (34%), as illustrated in Figure 6. However, when comparing these findings with responses given in the initial filtering process, there is some degree of differentiation. When asked to initially select the main motivation for choosing a destination, 'visit a museum' received the highest number of responses among all respondents with 27%, followed by 16% selecting 'go to a visitor attraction'.

When looking at responses from both questions, although the list of activities differed slightly, it is apparent that when selecting a destination, the museums and visitor attractions on offer were shown to draw people to the destination in the first instance. One way of interpreting the apparently conflicting feedback is that, once within a destination, activities such as exploring the countryside and eating in restaurants are activities in which visitors engage with as well, although this does not necessarily influence their destination selection.

In the case of *existing Kent cultural tourists*, the most frequently cited activities included, ‘visit a heritage venue (36%), ‘explore the countryside’ (33%) and ‘explore the coast’ (29%). This highlights a key aspect that has emerged many times in wider research – the Kent cultural tourist does not make a clear distinction between culture and heritage.

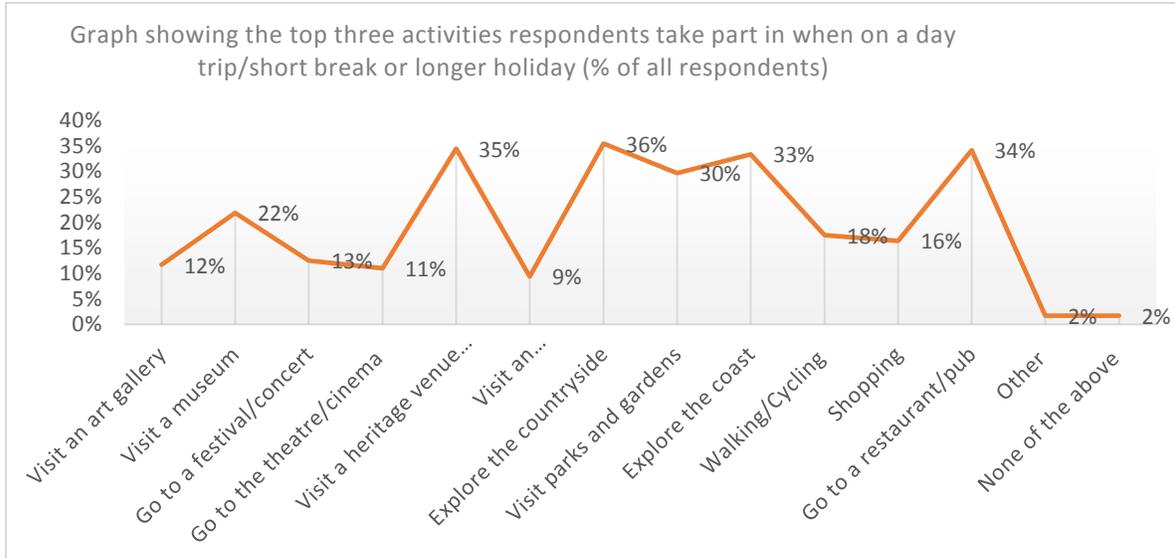


Figure 6: ‘What do you normally like to do as part of your day trip or short break/longer holiday? Please select the top three activities.’

Interestingly, when previously asked to select their main motivation for choosing a place to visit, 42% of *existing Kent cultural tourists* selected ‘museum’, although in Figure 7, 25% selected the latter. In addition, when looking at *potential cultural tourists*, the top three selected activities included; ‘go to a restaurant/pub’ (35%) ‘explore the countryside’ (31%) and ‘visit a museum’ (29%). Delving deeper into this category of visitors, 39% of this group cited museums as their main motivation initially, and remained partially consistent in their choice.

These findings suggest that when choosing a place to visit, the cultural offer of a destination is often the main attraction for these two groups, however there is some differentiation in terms of what activities are normally conducted when in the destination. While 29% of *potential cultural tourists* selected ‘museums’, a higher proportion selected ‘go to a restaurant/pub’ and ‘explore the countryside’.

This therefore shows the importance of the cultural offer, in addition to the needs of cultural tourists. As previously highlighted in the evidence review, from a consumer’s perspective, cultural tourists do not make the same distinctions between visitor attractions and cultural venues. These findings also point towards evidence that the experience demanded by cultural tourists is wide-ranging and they seek a total experience of the location and its people (Lord, 1999.)

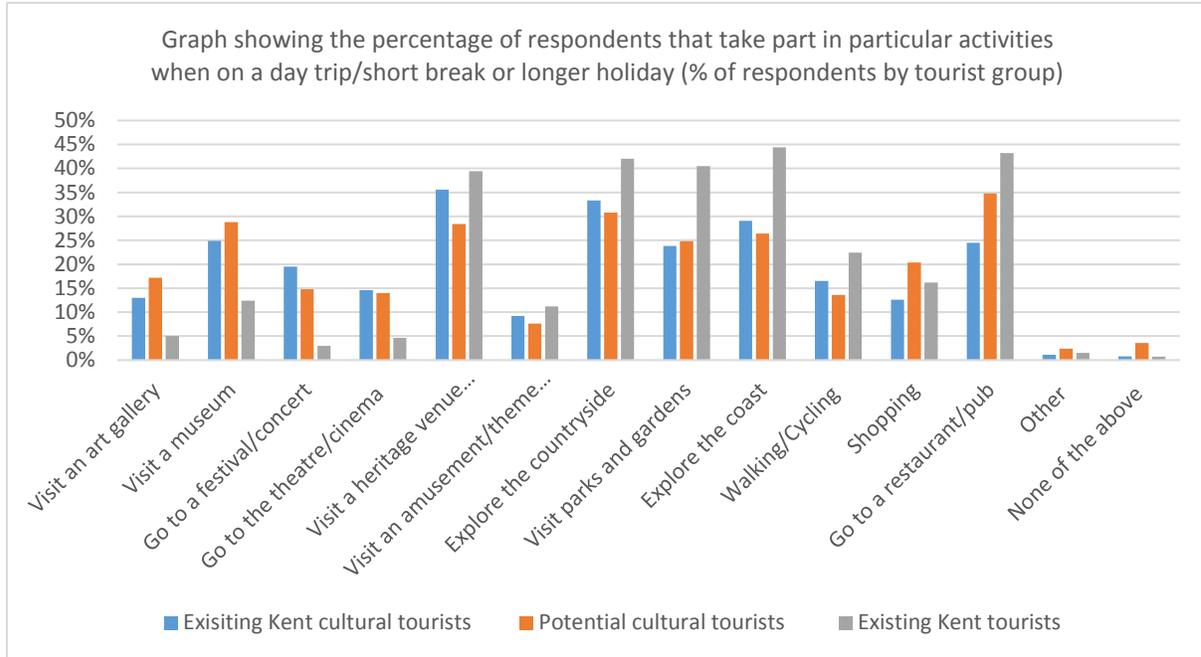


Figure 7: Graph showing the percentage of respondents that take part in particular activities when on a day trip/short break or longer holiday (% of respondents by tourist group)

Figure 7 also shows responses from those categorised as *existing Kent tourists*, with findings indicating that the most popular activities included, ‘explore the coast’ (44%), ‘go to a restaurant/pub’ (43%) and ‘explore the countryside’ (42%). When compared to main motivations, the findings are consistent, with the most commonly cited motivations being ‘go to a visitor attractions’ and ‘walking and cycling’ with regards to destination selection, these are also perceived more as leisure activities.

Links to Matrix of Cultural tourist types - Looking at activities normally undertaken by cultural tourist types, *purposeful cultural tourists* placed a strong importance on heritage venues (41%), closely followed by visiting a museum (40%). This was also the case with regards to heritage (38%), for *sightseeing cultural tourists*, indicating that heritage is an important aspect of the cultural offer. As this question is not Kent specific, it also illustrates that the heritage offer is important to culturally-motivated tourists irrespective of destination.

6.2 IMPORTANCE OF THE CULTURAL OFFER VS. PRIMARY MOTIVATION

To further explore the importance of the cultural offer and motivations for participating in cultural activities, respondents were asked to rate the importance of the cultural offer when choosing a place to visit in the UK. Looking at responses from all respondents, the majority stated that the cultural offer was ‘very important’ (53%), with 7% stating that the cultural offer was ‘the main reason’ when choosing a place to visit. This was followed by 26% stating it was ‘neither important nor unimportant’. Only a very small percentage of all respondents stated the cultural offer was ‘unimportant’ (3%). In addition, 7% stated it was ‘the main reason’ for choosing a place to visit, which further reinforces the idea that the perception of the cultural offer in visitors minds is perhaps complex and wide-ranging.

As seen in Figure 8 below, these findings are also consistent when looking at each of the tourist groups. Between the two groups whose primary motivation was cultural activities, the majority stated the cultural offer was ‘very important’, showing consistency across both groups’ responses.

Interestingly, responses given by *existing Kent tourists* indicate that a higher percentage than that of *potential cultural tourists*, stated the cultural offer was ‘very important’, although this difference is small. This shows that although the ‘leisure’ group in the filtering process may have not initially selected cultural activities, the cultural offer has weight when it comes to choosing a destination.

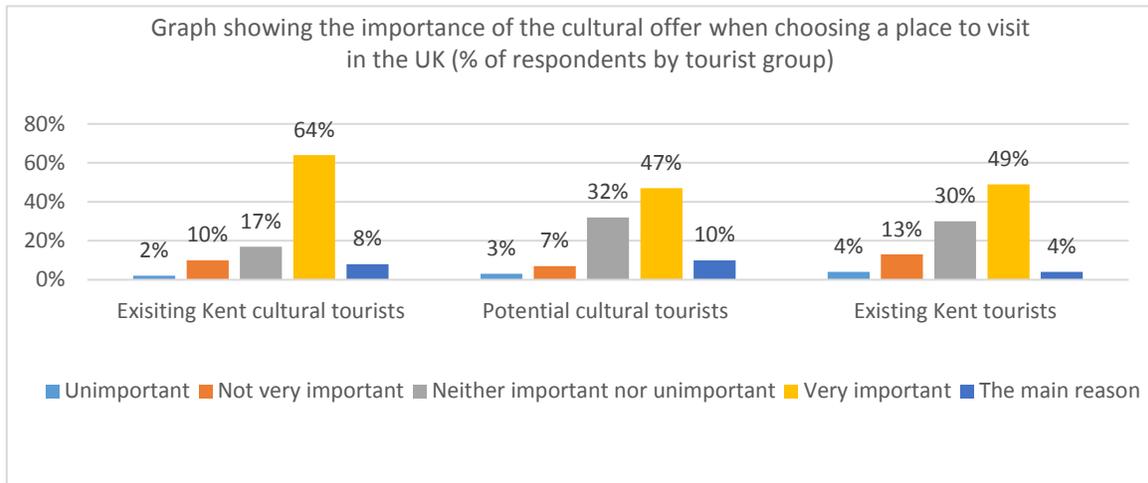


Figure 8: When choosing a place to visit in the UK, how important is the cultural offer?

6.3 DEPTH OF CULTURAL EXPERIENCE SOUGHT VS. PRIMARY MOTIVATION

Respondents were also asked to select their reasoning for participating in cultural activities when visiting a place in the UK, as illustrated in Figure 9. Findings indicate that the highest percentage of respondents among both *existing Kent cultural tourists* and *potential cultural tourists* selected either ‘to learn a little about what I am seeing’ (36% of each group), or ‘to learn a lot about what I am seeing’ (31% of the *existing cultural tourists* and 33% of the *potential cultural tourists*). This proves that amongst those groups who selected culture as their primary motivation, there is a level of conscious motivation to learn whilst on a trip and not purely for entertainment purposes.

Looking at *existing Kent tourists’* choices, ‘to learn a little about what I am seeing’ (39%) and ‘mostly for sightseeing/to be entertained’ (32%), were the preferred options. This demonstrates that amongst this group there is more motivation for sightseeing and entertainment activities, however, whilst at the destination, they are willing to participate in cultural activities to learn, in a similar way to cultural tourists, despite having initially selected leisure activities as their primary motivator.

Across all groups, a small percentage of respondents were motivated to visit/participate in cultural activities by the need to develop a deep understanding. This finding may imply that the rationale for visiting/participating in cultural activities from the perspective of cultural tourists may not be deep and meaningful and is driven by various other factors. The latter relates to the cultural tourist types outlined in the matrix identified in the evidence review, showing the balance between those that are *purposeful cultural tourists* and those who seek an experience perhaps more in line with that of a *sightseeing* or *casual cultural tourist*.

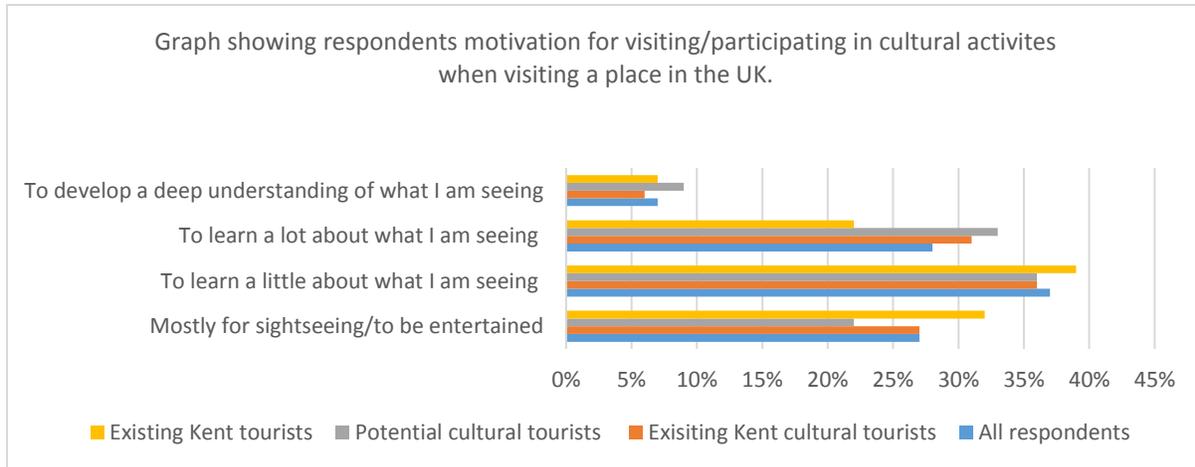


Figure 9: 'When visiting a place in the UK, do you visit/participate in cultural activities?'

6.4 CULTURAL TOURIST SELF-CATEGORISATION VS. CULTURAL TOURIST TYPES

In order to gain a more in-depth understanding of the classification of cultural tourists, this section will cross analyse how respondents view themselves as cultural tourists and how different combined answers relate to the matrix of cultural tourist types highlighted in the evidence review. In terms of self-categorisation, respondents were asked two questions; to what extent they would describe themselves as a cultural tourist and to select a statement that best describes the importance of cultural activities when choosing a destination to visit.

When classifying respondents into the cultural tourist matrix, a combination of answers given to questions relating to both depth of cultural experience sought and importance of culture in their decision to visit a destination were used. Through this, the interplay between tourists' self-categorisation in parallel with the understanding of cultural tourist types as developed from the evidence review, which has been previously used in other destination settings. As seen in Figure 10, the most prevalent response amongst all respondents was that they 'sometimes' (39%) describe themselves as a cultural tourist. This finding was also mirrored across responses given by each tourist group, which was followed by 'yes, most of the time', with the latter being strongly represented by both the cultural tourist groups. Furthermore, only a small proportion of all respondents selected 'not at all' (4%), which indicates that regardless of the initial motivation to visit a destination, the majority of tourists, including those motivated by leisure, will identify themselves as cultural tourists in some respect.

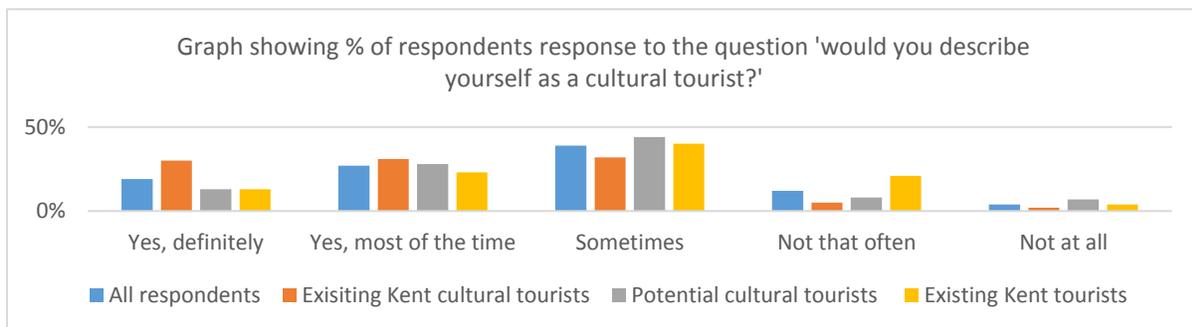


Figure 10: 'Would you describe yourself as a cultural tourist?'

When looking at what role culture plays in choosing a place to visit, respondents were asked to select a statement that describes them best, which corresponded to the matrix of cultural tourist types identified in the evidence review.

As illustrated in the table below, the majority of all respondents stated that culture plays some role in selecting a destination, as it contributes towards the experience. In addition, the findings demonstrate that for those motivated by culture, although playing a conscious role, they do not necessarily seek only cultural activities. Findings previously shown concerning the diverse nature of the cultural offer are supported here, as culture is perceived to be an important element of the overall experience desired within a destination, with the majority of all respondents identifying themselves as a *casual cultural tourist*.

Cultural statement	Existing Kent cultural tourists	Potential cultural tourists	Existing Kent tourists	All respondents
Purposeful cultural tourist- Culture is often the main reason I choose a place to visit to learn something new.	24%	12%	12%	16%
Sightseeing cultural tourist- Culture is often a key reason I choose a destination/place to visit in order to be entertained.	34%	27%	19%	27%
Casual cultural tourist- Culture often plays some role in my decision to choose a destination/place to visit as it can add to the experience of the place.	30%	36%	36%	34%
Incidental cultural tourist- Culture plays no real role in my decision to choose a destination/place to visit but when I am there cultural activities can add to the experience of the place.	7%	14%	23%	14%
Serendipitous cultural tourist- Culture plays no real role in my decision to choose a destination/place to visit but when I am there I often seek interesting cultural experiences.	2%	4%	7%	5%
None of the above.	3%	7%	4%	5%

Figure 11: Table showing respondents self-categorization with regards to the role of cultural activities

These findings highlight that the majority of both *potential cultural tourists* and *existing cultural tourists* identified themselves as cultural tourists. Both groups are potential markets to target, despite the varying degree to which they perceive themselves as cultural tourists, as culture plays a role within destination selection. This knowledge can inform the way in which the cultural offer is presented to potential markets in marketing communications.

As highlighted in the evidence review, the attention given to the categorisation of cultural tourists is important, as they cannot be represented as one single market. This was reinforced in previous sections - the cultural product/offer is diverse, with the experience within the destination itself, more important than firm classifications. Exploring cultural tourist types allows the importance of culture and the depth of experience sought to be examined.

To utilise the cultural tourist framework developed by McKercher (2002), which has also been applied in publications by The Mayor of London (2015) and Failte Ireland’s (2012) ‘Strategy of Cultural Tourism in Ireland’, responses from a combination of questions were used and adapted to mirror the cultural tourist types outlined within the model.

The results presented in Figure 12 show the percentage of respondents that fall into the matrix of cultural tourist types. Findings show that 31.9% of all respondents fell into the category of *sightseeing cultural tourist*, followed by those categorised as *purposeful cultural tourist* (28.8%).

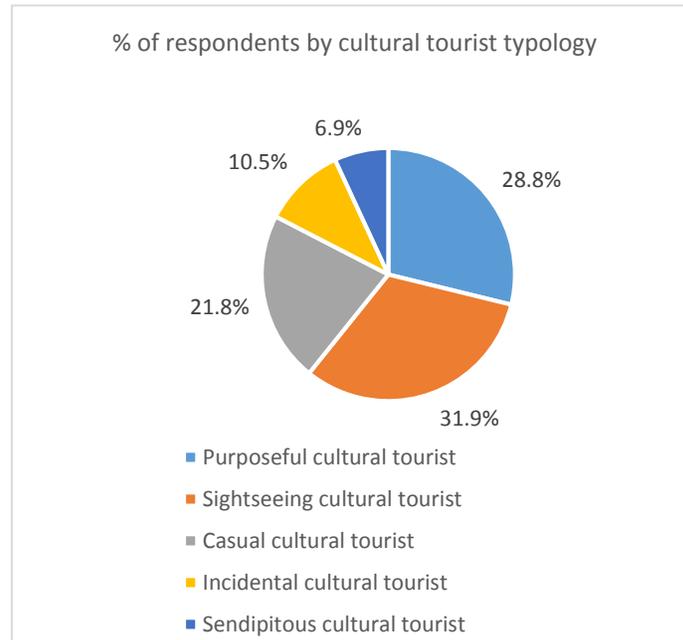


Figure 12: Pie chart to show the % of respondents in the context of the matrix of cultural tourist types, as identified in the evidence review

Overall, the highest proportion of respondents were classed as *sightseeing cultural tourists*, who see culture as a key motivator, but the type of experience sought is more entertainment-focused. This is then followed by *purposeful cultural tourists*, whose primary motivator for decision-making is driven by the need for a deep cultural experience.

This cross-analysis with the cultural tourist matrix, enables the exploration of respondent's cultural classification in the context of the cultural tourist types identified in the evidence review. With the findings supporting the idea that while many are motivated by the cultural offer to visit a destination, the depth of experience sought is wide-ranging; - from those seeking a meaningful experience to those who see it as more entertainment-focused and, as highlighted previously, adding to the overall experience of the place.

In order to look at any differences between respondents' self-categorisation and their categorisation according to the matrix, Figure 13 displays the percentages for each among all respondents. The most noticeable differences are in percentages for *purposeful cultural tourists*, *casual cultural tourists* and *sightseeing cultural tourists*, all of which are the most prominent groups among all respondents.

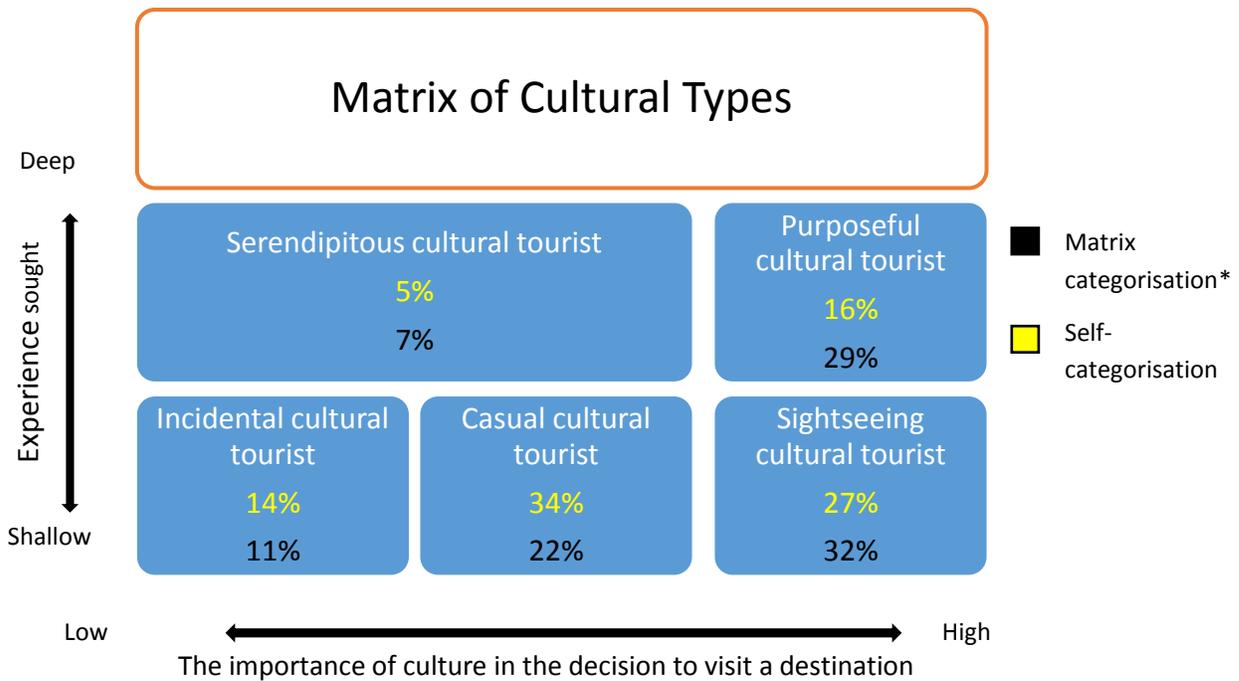


Figure 13: Matrix of cultural tourist types, displaying percentage of respondents' self-categorisation and categorisation *based on depth of experience and importance of culture (Adapted from Mckercher and du Cros, 2003).

In the case of *purposeful cultural tourists*, a smaller percentage self-categorised themselves within this group. This may be due to the confines of the self-categorisation options provided, as respondents may not place themselves in the strongest category. When respondents are left to answer additional questions on a more unconscious level, their responses do in fact show they are classed as *purposeful cultural tourists*. This shows support for the application of the matrix as a two dimensional analysis of cultural tourist types via a combination of centrality of culture in decision-making (importance), and depth of experience sought.

This was also found to be the case for *sightseeing cultural tourists*, as illustrated in Figure 13. However, a higher proportion of respondents self-categorised themselves as *casual cultural tourists*. When asked to consciously place themselves in a category, respondents tend to select a more neutral option, reinforcing the point made previously in support of the model.

By looking at two ways of categorising respondents into tourist types, the validity of the result is increased as it looks at both self-categorisation and categorisation according to the cultural tourist matrix. The overall picture that emerges for how visitors see themselves (self-categorisation) and how they respond to the two dimensional structure of the matrix, shows the strength of *sightseeing cultural tourists* and *casual cultural tourists* for both, and when using the two dimensional structure, the *purposeful cultural tourist* type is strong. Thus, it is useful to delve deeper into these cultural tourist types to see if their responses to key questions in the survey help to define not just how culture features in their destination choice and level of experience whilst at a destination, but also how they see Kent as a cultural destination, what types of activities they engage in and how to influence their destination choice (i.e. to help with developing targeted experiences and effective marketing communications- see summary and recommendations section.)

7 CURRENT KENT VISITOR TRENDS AND PERCEIVED BARRIERS

This section of the report moves on to cover visitor trends and perceived barriers of Kent as a destination. The two groups that initially specified they had been to Kent in the last three years were asked about the type of trip taken and when they last visited, as seen below in Figure 14.

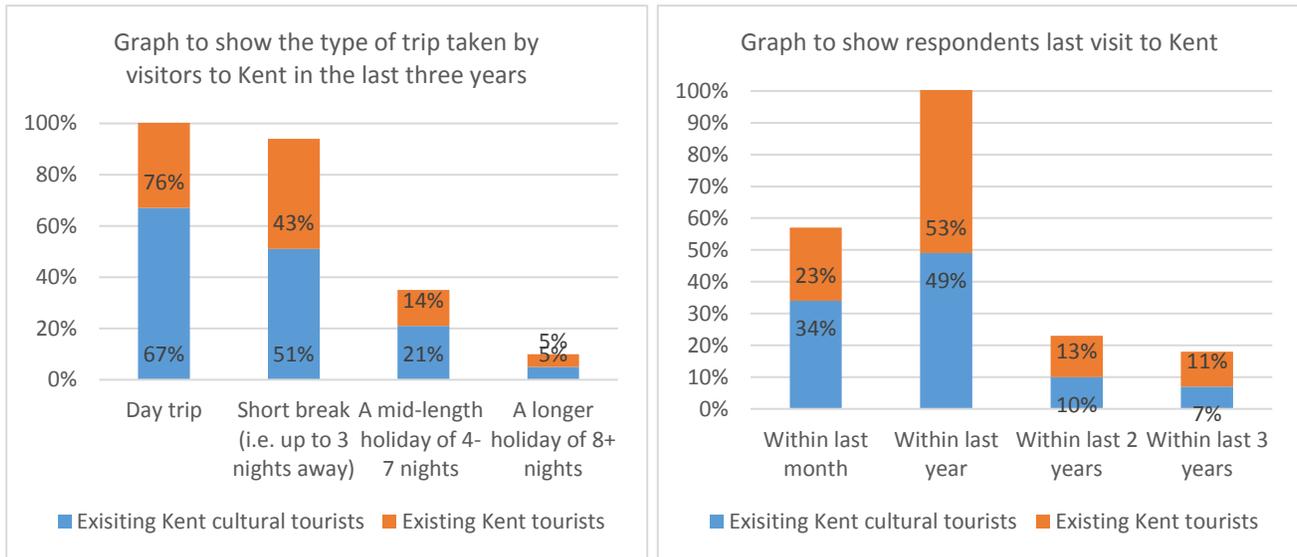


Figure 14: ‘Have you taken a day trip, shorter break, mid-length or a longer holiday to Kent in the past three years? Please select all that apply’ and ‘when did you last visit Kent on a day trip, short break or longer holiday?’

As illustrated above, it can be observed that the majority of *existing Kent cultural tourists* stated that they had been on a day trip to Kent in the last three years (67%). In the case of *existing Kent tourists*, 76% had taken a day trip in the last three years.

A higher proportion of *existing Kent cultural tourists* went on short breaks (51%) and mid-length holidays (21%) than *existing Kent tourists* (43% and 14% respectively). Cultural tourists’ tendency to spend longer in Kent may reflect an opportunity to promote a wide range of activities and places to visit, supporting the role of cultural tourism in sustaining destinations.

In addition, respondents were asked when they last visited Kent, with findings showing that for both groups the largest proportion of respondents had visited Kent in the last year (*existing Kent cultural tourists*, 49% and *existing Kent tourists* 53%). In both cases, this was then followed by those who had visited in the last month, which was more prevalent among the cultural tourists (34%). It must be noted that the percentage of people who visited in the last month might have been different if the survey was carried out during the summer months, when visitation increases.

It could be assumed that for those visitors whose primary motivation is cultural activities, their likelihood to spend longer trips in Kent may reflect the diverse and varied need as a cultural tourist to fully experience the destination and diverse nature of the cultural tourism offer, as previously highlighted. It can also be viewed that Kent offers a rich cultural setting to entice them to visit for longer. However, when cross-analysing these findings with visitors’ origin, a significant percentage of respondents were from London, particularly in the instance of *existing Kent cultural*

tourists. This also contributed to the likelihood to stay longer, as they were not residents of Kent, who accounted for the second largest proportion of respondents.

When looking at visitor figures in terms of volume and value, comparing figures from the 2016 Economic Impact Cambridge Model, from 2013-2015 the number of trips to Kent experienced a 4% increase (2 million additional visitors) and the value of tourism experienced a 4.8% increase to £3.6 billion. Despite the fact that this has not been broken down by trips for cultural purposes, it can be assumed that the increase will have resulted in a subsequent increase in the number of visits to cultural venues.

As one of the tourist groups stated they had not visited Kent in the last three years (*potential cultural tourists*), the survey therefore looked to identify any reasons for having not visited. As seen in Figure 15 below, respondents were asked to select any barriers to visiting, in addition to being able to specify any other contributing factors.

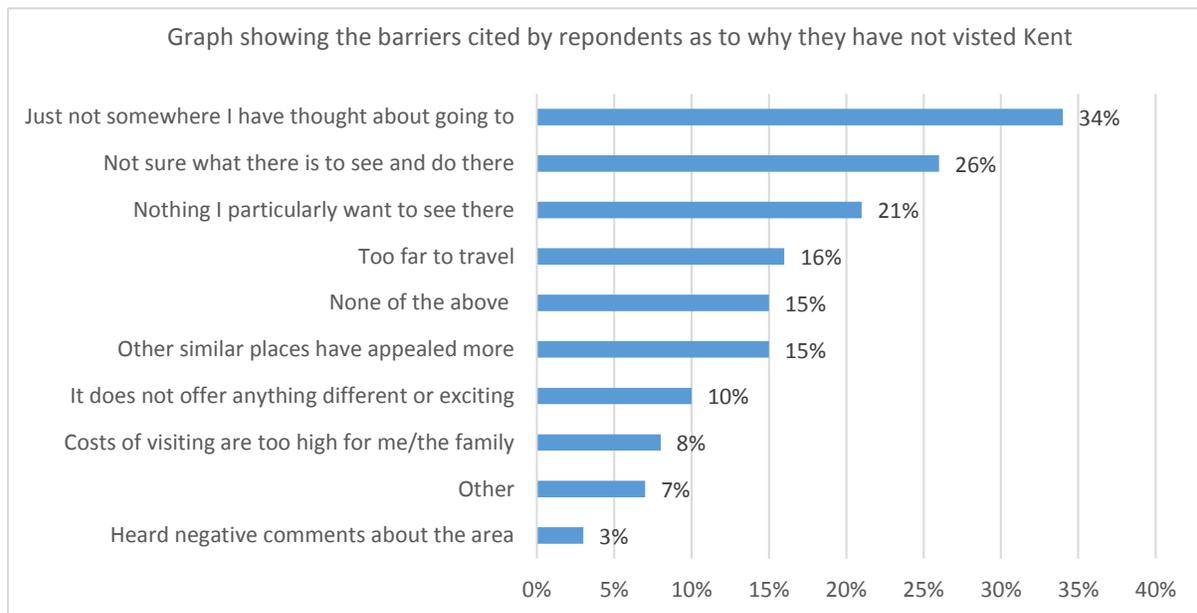


Figure 15: 'Why haven't you visited Kent? Please tick all that apply.'

The results show that the most cited reason for having not visited Kent was that it was 'just not somewhere I have thought about going to' (34%), followed by 'not sure what there is to see and do there' (26%). To fully explore these findings and to assess whether there has been any shift in perceived barriers, Visit Kent's 2012 perception research study was used as a comparison. It should be noted that the 2012 perception research was conducted using both a UK and international database as well as a different methodology and sample so the findings cannot be directly compared.

Looking at the results from both, it is evident that the top two barriers remain unchanged, with visitor's lack of awareness of Kent as a destination and what it has to offer continuing to be major challenges in attracting new or lapsed visitors. With regards to it being too far to travel, this remains one of the top four reasons cited. The high cost of visiting has decreased compared to the 2012 result, although in both cases this accounted for a relatively low proportion of respondents. When looking at additional barriers cited by *potential cultural tourists* who stated 'other', these included factors such as; they are going to Kent this year, they live there and that they would prefer to go abroad. In most cases, these findings mirror the trends of the previous perception research, except instances such as Kent not being as costly as before. Without being able to delve deeper into these two different sets of data, it

could be suggested that the need to increase the awareness of Kent as a destination and its cultural and tourism offer should remain a priority.

The top two barriers remain unchanged, with visitor’s lack of awareness of Kent as a destination and what it has to offer, continuing to be major challenges in attracting visitors.

Despite the decreased association with Kent being too expensive, the need to increase the awareness of Kent as a destination and its cultural and tourism offer should still be treated as a priority.

8 PERCEPTIONS OF KENT

To further explore the perceptions of Kent as a destination, respondents were firstly asked to state the first three words that come to mind when Kent is mentioned. Figure 16 displays the most frequently-cited words amongst all respondents, with the most commonly used shown as the largest. The most commonly used words were ‘gardens’, ‘countryside’, ‘hops’ and ‘coast’. When comparing these findings the Visit Kent perception research in 2012, results are consistent, with words including ‘garden’, ‘countryside’, ‘beaches’ and ‘hops’ again the most commonly used. This shows that Kent still conveys a strong image of natural landscapes, even for those motivated by culture, who look for cultural experiences in attractive natural settings.



Figure 16: Word cloud showing the most commonly used words among all respondents when asked- ‘What are the first three words that come to mind when Kent is mentioned?’

To explore any differentiation between the tourist groups, Figure 17 displays the most commonly used words for each group. For *existing Kent cultural tourists*, words were strongly associated with greenery and gardens, with the other two groups offering a more varied response covering ‘gardens’, ‘coast’ and ‘countryside’. In the case of *potential cultural tourists*, the most frequently cited word was ‘hops’. Furthermore, these results display the strong and positive image that Kent has in the minds of tourists, among both visitors and non-visitors.

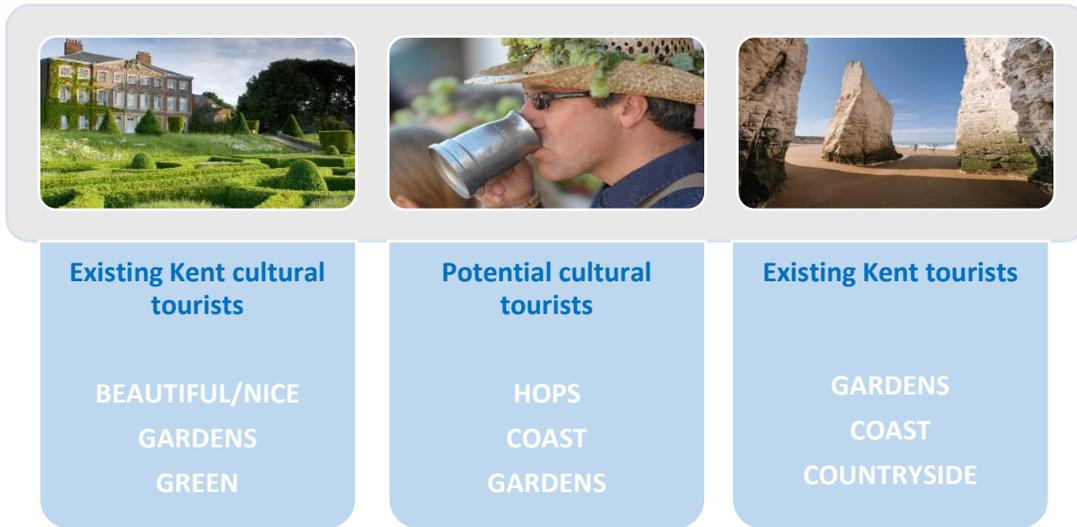
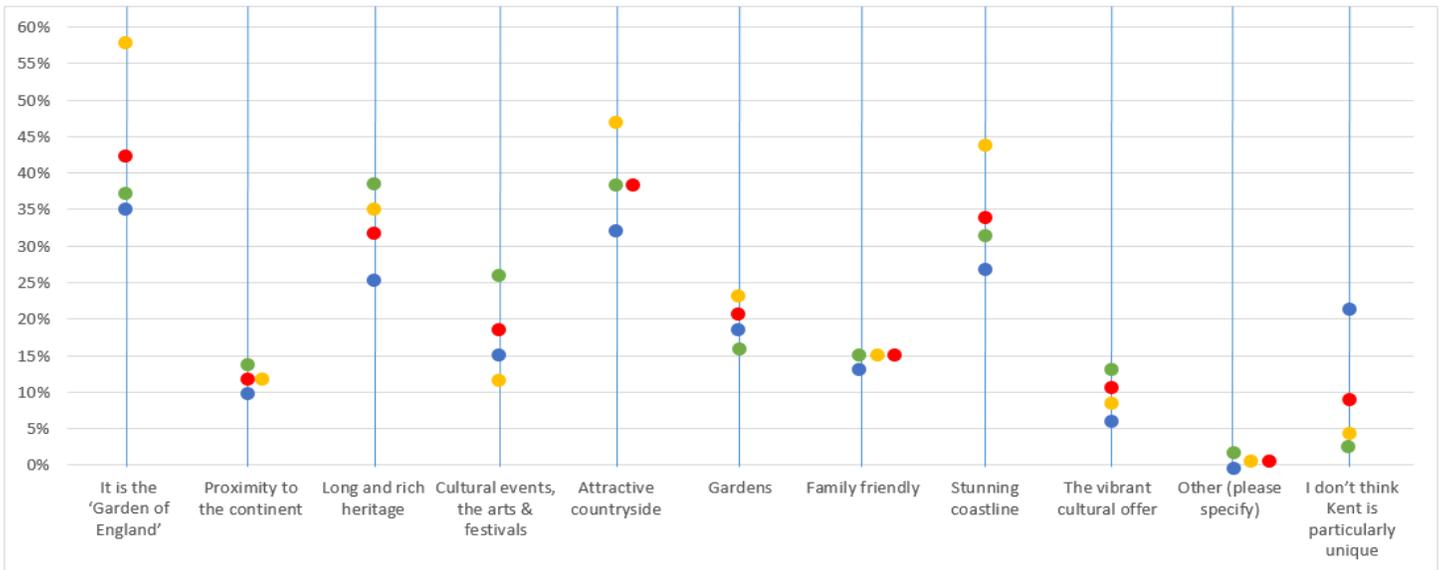


Figure 17: Diagram to show the most commonly used words for each tourist group when asked- 'What are the first three words that come to mind when Kent is mentioned?'

To further explore the perceptions of Kent as a destination, respondents were asked what they thought made Kent unique, special or different to other UK destinations, from a list of factors, as seen in Figure 18 below.



● Existing Kent cultural tourists ● Potential cultural tourists ● Existing Kent tourists ● All respondents

Figure 18: 'In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only'

The most frequently selected attributes by all respondents included; 'it is the Garden of England' (43%), 'attractive countryside' (39%), followed by 'stunning coastline' (34%). These aspects were also the most highly regarded aspects among both *existing Kent tourists* and *potential cultural tourists*. However, responses given by *existing Kent cultural*

tourists differed slightly, with ‘long and rich heritage’ (38%) being selected as one of the top three factors that make Kent unique, special or different from other UK destinations.

With regards to the difference in responses by visitors and non-visitors to Kent in the last three years, the percentage of *potential cultural tourists* that selected several of the top factors including; ‘it is the Garden of England’ and ‘attractive countryside’ was lower than that of the other two groups that had been to Kent in the last three years – reinforcing the idea once they visit, their perceptions are much more defined. In addition, when looking at the number of respondents from each group that selected ‘cultural events, the arts and festivals’, this was most prominent among *existing Kent cultural tourists* (26%). Lastly, when looking at these results in comparison with the Visit Kent perception research conducted in 2012, it is evident that Kent being the Garden of England is still the most unique aspect defining the county, in addition to the heritage offer.

Respondents were then asked to rate the extent to which they associate Kent with words from a prompted list. Findings from all respondents indicate that the strongest association with Kent was it being the ‘the Garden of England’ – 73% (combining ‘very much so’ and ‘quite a lot’). This was followed by ‘coastline’ (69%) and ‘quintessentially English’ (68%).

In terms of cultural associations, a significant number of all respondents rated words such as, ‘arty’ and ‘contemporary’ fairly low, although 54% associated Kent with being ‘cultural’. Furthermore, when comparing the main results with the Visit Kent 2012 perception study, findings are fairly comparable, with both ‘the Garden of England’ and ‘quintessentially English’ rated highest in terms of associations with Kent, as illustrated below in a word cloud included in the 2012 study (For more context, please see the orange box at the end of the section.)



Figure 19: Commonly associated words with Kent (Visit Kent perception research, 2012)

Following this, responses including ‘quite a lot’ and ‘very much so’ were combined once again, to identify the strongest associations of Kent in relation to each tourist group. All respondents displayed a strong association with the ‘the Garden of England’, which was particularly strongly in the case of *existing Kent tourists* (84%) and *existing Kent cultural tourists* (77%). Although, ‘the Garden of England’ was the strongest association among *potential cultural tourists* (56%), the proportion was lower than that of existing visitors. The top associations for each group are illustrated further below in Figure 20.

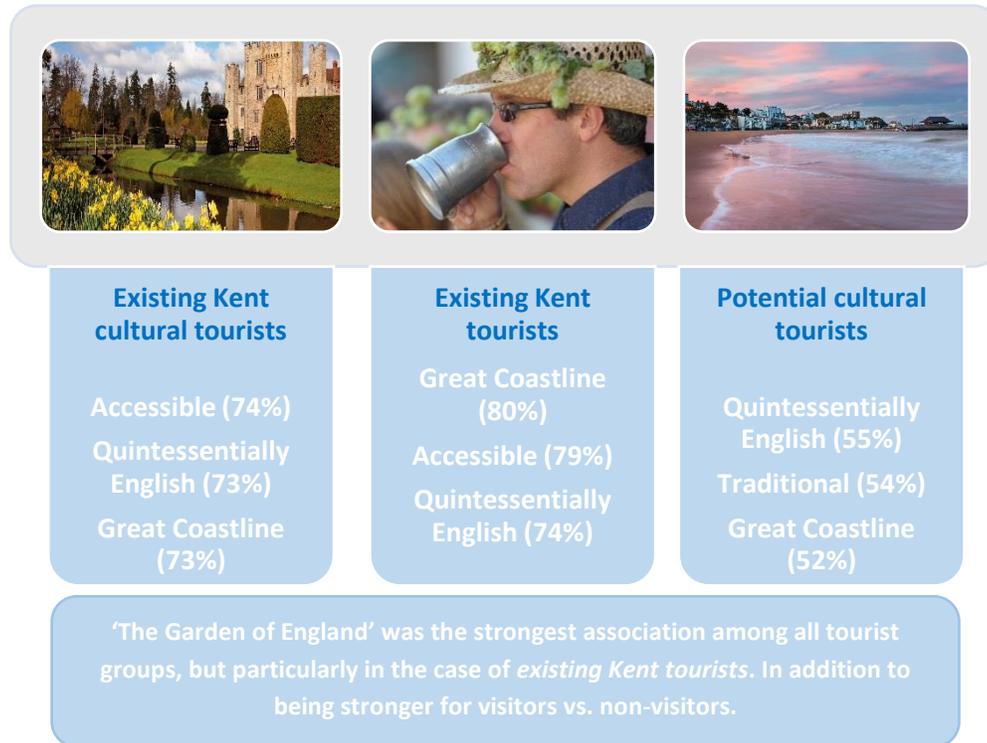


Figure 20: Diagram showing the top associations with Kent among each tourist group.

Looking at the cultural attributes of the list only, *existing Kent cultural tourists* responded most positively to aspects including, ‘cultural’ (68%), ‘exhibitions’ (52%) and ‘arty’ (51%), which is consistent with their previously stated primary motivation surrounding the culture offer. However, a significant proportion (38%) of this group associated Kent with being ‘contemporary’ a little. This shows that Kent’s association to culture in the minds of such tourists may at times be strongly linked with more traditional heritage aspects. This proves that, for tourists, the definition and scope of culture is wide ranging, with no clear boundaries between culture and heritage – particularly in the context of Kent. However, unlike ‘arty’, ‘contemporary’ does not necessarily refer just to culture, it may have also been used in a broader destination sense, covering aspects such as accommodation and eateries.

When looking at *existing Kent tourists*, their associations with aspects such as ‘arty’, ‘exhibitions’ and being ‘contemporary’ were relatively low, although 54% associated Kent with being ‘cultural’. These lower cultural associations are consistent with their primary leisure motivation. However, once again a strong association with Kent being ‘cultural’ may present further evidence that this is based on more traditional forms of culture such as the heritage nature of Kent as a destination.

Delving deeper, the findings show a significant difference in strength of associations when looking at visitors and non-visitors. Of those categorised as *potential cultural tourists* (non-visitors), the majority of aspects were only associated with Kent ‘a little’, including cultural aspects, despite their primary motivation being culturally-led.

Therefore, it could be suggested that those who have visited Kent were more likely to strongly associate Kent with the cultural product compared to non-visitors.

Links to Matrix of Cultural Tourist types- ‘The Garden of England’ was the strongest association, particularly for *purposeful and sightseeing cultural tourists* (both 80%). *Purposeful cultural tourists* displayed the strongest association with Kent being ‘cultural’ (70%), supporting their firm interest in culture. However, *casual cultural tourists* had lower cultural associations (33%), which is representative of their cultural profile that culture adds to the overall experience. All cultural tourist types had a lower association with Kent being ‘contemporary’, with the exception of *sightseeing cultural tourists*. This was particularly prevalent in the case of *casual cultural tourists* (18%), with a stronger association with ‘traditional’ (50%) observed. This outcome reinforces the idea that traditional aspects such as heritage are important elements of Kent’s cultural offering.

*When comparing the fact that **54% of respondents associated Kent with being ‘cultural’** with previous research, **there has been an increase in the percentage of those who associate Kent with cultural aspects.** For example, in the 2012 Visit Kent perception research, 23% strongly associated Kent with ‘cultural events, the arts and festivals’, alongside 20% of respondents associating Kent with ‘cultural events and festivals’ later in the 2015 Visit Kent Conversion research.*

*Furthermore, in a recent Kent Destination Report published by VisitEngland in 2017, **results highlighted that 36% of respondents associated Kent with ‘arts’, which was higher than that of the UK average.** This illustrates a further increase in respondents associating Kent with a strong cultural offer.*

Kent’s association to culture in the minds of such tourists may at times be strongly linked with more traditional heritage aspects, showing that the definition and scope of culture is wide-reaching.

**Please note: These results are not directly comparable due to each studies’ use of different sample sizes, question wording and use of scales.*

9 LIKELIHOOD TO RECOMMEND

Respondents who had visited Kent were asked to finally rate the extent to which they would recommend Kent as a destination to friends and family, based on their previous experiences, as seen in Figure 21.

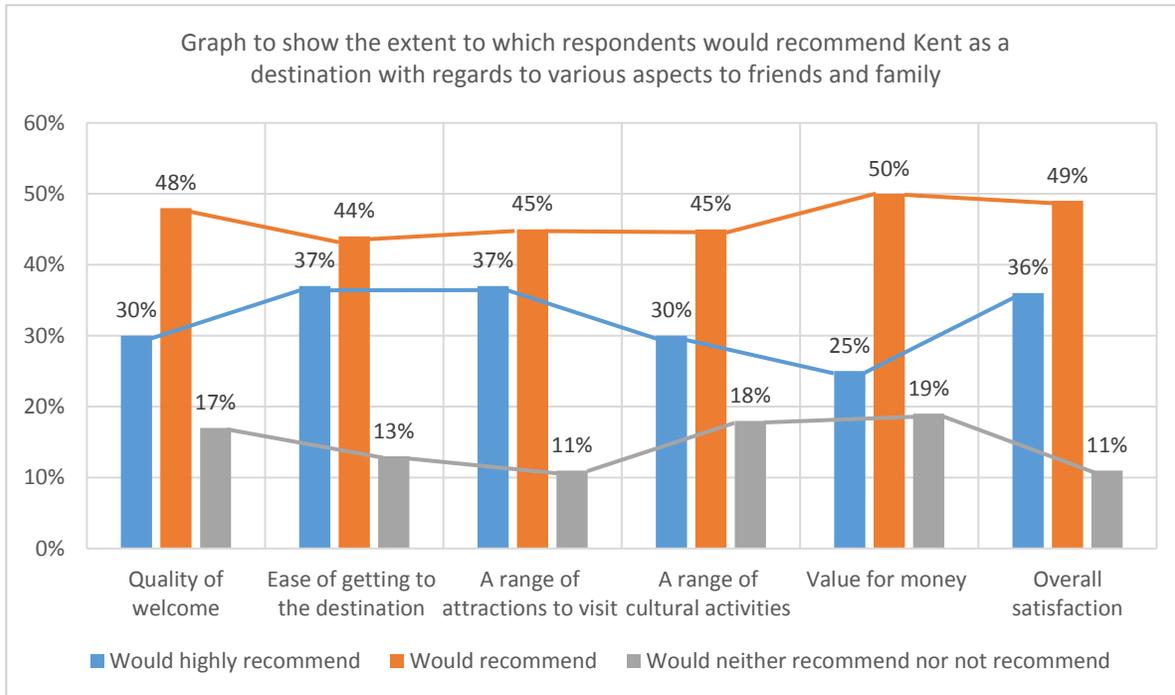


Figure 21. 'Based on your experiences during your last visit to Kent, to what extent would you recommend Kent as a destination to friends and family? Please rate the following attributes'

Analysis shows that for both groups the majority of respondents stated they would either 'highly recommend' or 'would recommend', each aspect of Kent as a destination to friends and family. This highlights once more the positive impact Kent has had on those who had visited, with respondents' experiences cementing a clear positive recommendation to friends and family. As the latter was previously identified as the main source of inspiration for destination selection, this shows a strong promise with regards to increasing visitors through friends and relatives recommendations.

With regards to aspects not as highly recommended, both 'a range of cultural activities' and 'value for money', received the largest proportion of those who stated they 'would neither recommend or not recommend'. This may show that for these aspects in particular, visitors may not have experienced these aspects as strongly.

10 RECOMMENDATIONS

According to the findings, when looking at targeting additional cultural tourists, messaging should be tailored to appeal to a younger demographic.

Although a visitor's primary motivation may be culturally led, they are motivated to experience culture and cultural activities whilst in an attractive rural or coastal setting, illustrating the diverse and complex nature of the cultural tourism offer in the minds of tourists. This highlights a need to expand the promotion of the cultural offer in Kent beyond cultural and art venues to the wider destinations and natural environments.

Although recommendations from friends or relatives plays a significant role as a source of inspiration, offers and promotions still play a big role in attracting visitors, especially *sightseeing* or *casual cultural tourists*. Yet, it appears that the *purposeful cultural tourist* draws his inspiration from travel guide websites, highlighting that cultural tourism providers could target organisations such as Lonely Planet, Rough Guide, and blogs as platforms to attracting visitors seeking a meaningful cultural experience.

Cultural tourists do not necessarily make the same distinctions between visitor attractions and cultural venues, with the heritage offer of a destination also being perceived as a major part of the culture offering. This supports the need for sustained cross-sectoral partnership working to grow Kent's number of visitors.

Even among tourists motivated by leisure, the cultural offer still has considerable weight, and findings show that leisure motivated tourists can also play a role in exploring Kent's cultural offer, despite their apparent primary motivation.

While many are motivated by culture, the depth of experience sought is wide-ranging - from those seeking a meaningful experience to those who see it as more entertainment-focused. The majority of tourists will identify themselves as cultural tourists to some degree.

Cultural tourists' tendency to spend longer in Kent may reflect an opportunity to promote a wide range of activities and places to visit. For instance, with the use of suggested and tailored routes and itineraries, and by incorporating places to stay in areas with a strong cultural offering, longer breaks could be encouraged. Spending more time at the destination consequently means that the economic value of the visits grows. This supports the need for actively engaging in promoting the cultural tourism offer more, highlighting the scope for sustained cross-sectoral collaboration.

It can be suggested that there is a need to increase awareness of Kent as a destination and its offer to attract new visitors and to ensure an advantage against competitors.

There is a need to recognise the strong association cultural visitors make between Kent and its more traditional, heritage offer, reinforcing the rich Kent offer to visitors.

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Tango on the Terrace, Turner Contemporary (photo Jess Limbrick), courtesy of Turner Contemporary

For more detailed findings and evaluations developed from other areas of the Culture Kent Research Programme, refer to:

Report 1- The Audit of the Cultural Tourism Landscape.

Report 2- Organisational Perspectives.

For a combined summary of the full Culture Kent Research Programme, refer to:

Culture Kent Research Programme – Summary of Findings Report.

Supporting documents also produced by the Culture Kent Research Programme:

- *Culture Kent Pilot Project Case Studies 1-6*
- *Best Practice for Building Cultural Destinations*
- *Legacy and Ways Forward for Cultural Tourism in Kent*
- *Research Insights 1-3*

12 APPENDICES

- q1 Please select your age group
- Under 18
 - 18-24
 - 25-34
 - 35-44
 - 45-54
 - 55-64
 - 65+
- q2 Please select your gender?
- Male
 - Female
- qa What is the main thing you look for when choosing a place to visit for a day trip and/or short break/longer holiday in the UK?
- Visit an art gallery
 - Visit a museum
 - Go to the theatre
 - Go to the cinema
 - Go to a festival
 - Go to a concert
 - Go to a visitor attraction (e.g.: zoo, go karting, gardens)
 - Go shopping
 - Walking/cycling
 - Go to a restaurant/cafe
 - Visit an amusement/theme park
 - I have not taken a day trip/short break/longer holiday in the UK in the last three years
- qb Have you visited Kent in the last three years for a day trip and/or short break/longer holiday?
- Yes
 - No
- qc Why haven't you visited Kent?
- Nothing I particularly want to see there ()
 - Heard negative comments about the area
 - Costs of visiting are too high for me/the family

Too far to travel

Just not somewhere I have thought about going to

Not sure what there is to see and do there

Other similar places have appealed more

It does not offer anything different or exciting

Other (please specify)

None of the above

Other (please specify)

q3 Which one of the following areas do you live in?

Kent

London

Berkshire

Buckinghamshire

Essex

Hertfordshire

Surrey

Sussex

I do not live in any of the above regions

q4 Have you taken a day trip, short break or a longer holiday in Kent in the past 3 years?

Day trip

Short break (i.e. up to 3 nights away) (Have you taken a day trip, short break or a longer holiday in Kent in the past 3

A mid-length holiday of 4-7 nights (Have you taken a day trip, short break or a longer holiday in Kent in the past 3 years

A longer holiday of 8+ nights (Have you taken a day trip, short break or a longer holiday in Kent in the past 3 years?)

No (Have you taken a day trip, short break or a longer holiday in Kent in the past 3 years?)

q5 When did you last visit Kent on a day trip, short break or longer holiday?

- Within last month
- Within last year
- Within last 2 years
- Within last 3 years

q6 What are the first three words that come to mind when Kent is mentioned?

- Nothing
- Don't know

Other

q7 Range of culture/ arts venues (What influences you when choosing a place to visit?)

Range of theatres and cinemas (What influences you when choosing a place to visit?)

Events and festivals (What influences you when choosing a place to visit?)

Variety of literary connections (What influences you when choosing a place to visit?)

Range of visitor attractions (What influences you when choosing a place to visit?)

Range of shops (What influences you when choosing a place to visit?)

Quality of food and drink (What influences you when choosing a place to visit?)

Amusement/Theme parks (What influences you when choosing a place to visit?)

Beautiful countryside (What influences you when choosing a place to visit?)

Beautiful coastline (What influences you when choosing a place to visit?)

Other (What influences you when choosing a place to visit?)

None of the above

q8 Friends or relatives (What sources of information inspire you when choosing a destination to visit?)

Travel review websites (What sources of information inspire you when choosing a destination to visit?)

Travel Guide websites (What sources of information inspire you when choosing a destination to visit?)

Blogs (What sources of information inspire you when choosing a destination to visit?)

Special offers or promotions (What sources of information inspire you when choosing a destination to visit?)

Tourist organisation website (What sources of information inspire you when choosing a destination to visit?)

Cultural organisation website (What sources of information inspire you when choosing a destination to visit?)

A video on social media (What sources of information inspire you when choosing a destination to visit?)

A photo or post on social media (What sources of information inspire you when choosing a destination to visit?)

An article in a magazine or newspaper (What sources of information inspire you when choosing a destination to visit?)

Posters or images on billboards (What
sources of information inspire you when
choosing a destination to visit?)

Images from online adverts (What sources of
information inspire you when choosing a
destination to visit?)

Other (please specify) (What sources of
information inspire you when choosing a
destination to visit?)

None of the above (What sources of
information inspire you when choosing a
destination to visit?)

Other (please specify) (What sources of
information inspire you when choosing a
destination to visit?)

q9 Visit an art gallery (What do you normally like
to do as part of your day trip or short
break/longer holiday? Please select the top
three activities)

Visit a museum (What do you normally like to
do as part of your day trip or short
break/longer holiday? Please select the top
three activities)

Go to a festival/concert (What do you
normally like to do as part of your day trip or
short break/longer holiday? Please select
the top three activities)

Go to the theatre/cinema (What do you
normally like to do as part of your day trip or
short break/longer holiday? Please select the
top three activities)

Visit a heritage venue (historical house/castle)
(What do you normally like to do as part of your
day trip or short break/longer holiday? Please
select the top three activities)

Visit an amusement/theme park (What do
you normally like to do as part of your day trip
or short break/longer holiday? Please select
the top three activities)

Explore the countryside (What do you normally like to do as part of your day trip or short break/longer holiday? Please select the top three activities)

Visit parks and gardens (What do you normally like to do as part of your day trip or short break/longer holiday? Please select the top three activities)

Explore the coast (What do you normally like to do as part of your day trip or short break/longer holiday? Please select the top three activities)

Walking/Cycling (What do you normally like to do as part of your day trip or short break/longer holiday? Please select the top three activities)

Shopping (What do you normally like to do as part of your day trip or short break/longer holiday? Please select the top three activities)

Go to a restaurant/pub (What do you normally like to do as part of your day trip or short break/longer holiday? Please select the top three activities)

Other (please specify) (What do you normally like to do as part of your day trip or short break/longer holiday? Please select the top three activities)

None of the above (What do you normally like to do as part of your day trip or short break/longer holiday? Please select the top three activities)

Other (please specify) (What do you normally like to do as part of your day trip or short break/longer holiday? Please select the top three activities)

- q10 Cultural activities are seen to cover visits to a gallery, museum, theatre, cinema, festival and concert. When choosing a place to visit in the UK, how important is the cultural offer?
- Unimportant
 - Not very important
 - Neither important nor unimportant
 - Very important

The main reason

q11 Cultural activities are seen to cover visits to a gallery, museum, theatre, cinema, festival and concert. When visiting a place in the UK, do you visit/participate in cultural activities?

- Mostly for sightseeing/to be entertained
- To learn a little about what I am seeing
- To learn a lot about what I am seeing
- To develop a deep understanding of what I am seeing

q12 Cultural activities are seen to cover visits to a gallery, museum, theatre, cinema, festival and concert. Would you describe yourself as a cultural tourist?

- Yes, definitely
- Yes, most of the time
- Sometimes
- Not that often
- Not at all

q13 Cultural activities are seen to cover visits to a gallery, museum, theatre, cinema, festival and concert. Which of the following statements best describes you?

- Culture is often the main reason I choose a place to visit to learn something new.
- Culture is often a key reason I choose a destination/place to visit in order to be entertained.
- Culture often plays some role in my decision to choose a destination/place to visit as it can add to the experience of the place.
- Culture plays no real role in my decision to choose a destination/place to visit but when I am there cultural activities can add to the experience of the place.
- Culture plays no real role in my decision to choose a destination/place to visit but when I am there I often seek interesting cultural experiences.
- None of the above

q14 It is the 'Garden of England' (In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only)

Proximity to the continent (In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only)

Long and rich heritage (In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only)

Cultural events, the arts & festivals (In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only)

Gardens (In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only)

Family friendly (In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only)

Stunning coastline (In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only)

The vibrant cultural offer (In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only)

Other (please specify) (In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only)

I don't think Kent is particularly unique (In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only)

Other (please specify) (In your opinion, what makes Kent unique, special or different to other holiday destinations in the UK? Please select up to three factors only)

q15 Garden of England (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Quintessentially English (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Great Coastline (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Cultural (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Arty (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Exhibitions (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much

- A little
- Quite a lot
- Very much so

Declining / run-down (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Classic (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Tacky (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Quality (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Varied (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Changing (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all

- Not much
- A little
- Quite a lot
- Very much so

Contemporary (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Old fashioned (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Exciting (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Friendly (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Traditional (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Idyllic (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Crowded (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Accessible (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

Good value (To what extent do you associate Kent as a place to visit with each of the following words?)

- Not at all
- Not much
- A little
- Quite a lot
- Very much so

q16 Quality of welcome (Based on your experiences during your last trip to Kent, to what extent would you recommend Kent as a destination to friends and family?)

- Would definitely not recommend
- Would not recommend
- Would neither recommend nor not recommend
- Would recommend
- Would highly recommend
- Don't know

Ease of getting to the destination (Based on your experiences during your last trip to Kent, to what extent would you recommend Kent as a destination to friends and family?)

- Would definitely not recommend
- Would not recommend
- Would neither recommend nor not recommend
- Would recommend
- Would highly recommend
- Don't know

A range of attractions to visit (Based on your experiences during your last trip to Kent, to what extent would you recommend Kent as a destination to friends and family?)

- Would definitely not recommend
- Would not recommend
- Would neither recommend nor not recommend
- Would recommend
- Would highly recommend
- Don't know

A range of cultural activities (Based on your experiences during your last trip to Kent, to what extent would you recommend Kent as a destination to friends and family?)

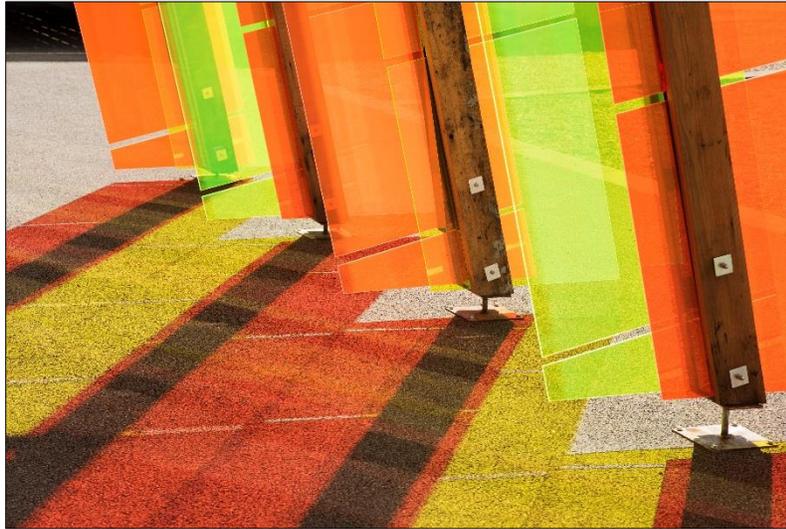
- Would definitely not recommend
- Would not recommend
- Would neither recommend nor not recommend
- Would recommend
- Would highly recommend
- Don't know

Value for money (Based on your experiences during your last trip to Kent, to what extent would you recommend Kent as a destination to friends and family?)

- Would definitely not recommend
- Would not recommend
- Would neither recommend nor not recommend
- Would recommend
- Would highly recommend
- Don't know

Overall satisfaction (Based on your experiences during your last trip to Kent, to what extent would you recommend Kent as a destination to friends and family?)

- Would definitely not recommend
- Would not recommend
- Would neither recommend nor not recommend
- Would recommend
- Would highly recommend
- Don't know



Dutch/Light by Jyll Bradley (photo Thierry Bal). Image courtesy of Historic Dockyard, Chatham

The Culture Kent Research Programme has been undertaken by the Tourism and Events Research Hub, Canterbury Christ Church University and Visit Kent.



The Tourism and Events Research Hub at Canterbury Christ Church University aims to provide a clearly defined research and knowledge exchange offer to the visitor economy. It brings together a team of researchers with areas of expertise ranging from tourism, culture and the arts, to stakeholder analysis and destination management and marketing, to collaborate on research and consultancy projects.

Email: tourismhub@canterbury.ac.uk
www.canterbury.ac.uk/tourismhub

Contact: Dr Karen Thomas, Director of the Tourism and Events Research Hub.



Visit Kent is the official Destination Management Organisation (DMO) for the county. Visit Kent provides a not-for-profit consultancy and delivery service, through Go to Places, that supports clients whose aims and objectives are deemed to lie within the core interests of Visit Kent and the wider visitor economy. Visit Kent has extensive experience in providing support to the Kent Visitor Economy, championing the county's £3.6 billion tourism industry and supporting 72,000 jobs.

Email: Raluca.brebeanu@visitkent.co.uk
www.visitkentbusiness.co.uk

Contact: Raluca Brebeanu, Destination Manager (Research and Development).

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