Culture Kent

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 Programme Summary of Findings Report

Turner Contemporary, Margate. Image courtesy of Visit Kent

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Culture Kent Turner Contemporary VISIT KENT GARDEN of ENGLAND VisitEngland ARTS COUNCIL ENGLAND

THE CULTURE KENT PROJECT

"There is no innovation without research and no progress without innovation."

Culture Kent was a three-year project led by Turner Contemporary and funded by Arts Council England and VisitEngland, as part of the *Cultural Destinations* programme.

Over the last three years Culture Kent has aimed 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; and
- **develop the information and knowledge core** that strengthens the Kent cultural tourism offer.

Research has always been key to this project and it was vital to me that we delivered a robust and detailed research programme that could not only inform the development of the project but also provide a legacy for future work on cultural tourism in Kent. The research also aimed to feed into the international and national conversations about the potential of cultural tourism and push ideas and debates further.

The research concentrated on three key areas:

- Evidence Review
- Organisational Perspectives
- Consumer Perspectives

These three separate but closely interlinked strands of research were vital to building a complete picture of cultural tourism. Reviewing previous national and international research was vital to ensure that we didn't reinvent concepts but built upon existing work. Delving into the minds of both more traditional tourism organisations and cultural ones was key to understanding the perceptual barriers and opportunities - only in this way can further partnerships be built, we need to know the foundations upon which we are trying to build. Then, last but no by means least, it is vital to understand how the consumer thinks – how they view a destination, how they interact with it and what some of the key motivators are.

Canterbury Christ Church University and Visit Kent led the two-year research programme and they have been aided by a Research Working Group who have cogitated and developed their work. I'd like to thank them all for their significant contribution and fantastic insights into cultural tourism.

Sarah Dance
Project Director
Culture Kent

CULTURE KENT RESEARCH PROGRAMME
SUMMARY OF FINDINGS REPORT

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

2 CONTEXT

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

Culture Kent was a three-year project led by Turner Contemporary and funded by Arts Council England and VisitEngland as part of the *Cultural Destinations* programme, launched 'to enable arts and cultural organisations working in partnership with destination organisations to increase their reach, engagement and resilience through working with the tourism sector'. [1] The opening introduction by the Project Director for Culture Kent highlights the Project's aims related to showcasing Kent's cultural assets and extending reach, creating new strategic partnerships and developing the information and knowledge core required to enhance the cultural tourism offer of Kent.[2]

The achievement of these targets for Culture Kent has required research and intelligence to inform the development of the project and to provide a legacy for future work on cultural tourism in Kent to be developed. This is essential in that the *Cultural Destinations* programme aimed 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.' [3]

A two-year research programme was commissioned by Culture Kent to provide research and evidence required to help the Project to achieve key outcomes. Figure 1 below sets out the research framework and identifies the key areas of work and indicates how they relate to the overall aims of Culture Kent.

Figure 1: Culture Kent Research Framework

[1] www.artscouncil.org.uk
[2] https://culturekent.net/
[3] www.artscouncil.org.uk

This report presents some key findings from the three key strands of research:

- Audit of the cultural tourism landscape
- Organisational perspectives research
- Consumer perspectives research

Separate detailed research reports are available for each of these strands.

During the delivery of this research programme, the research team reported to and shared progress reports and findings with the Culture Kent Steering Group and a smaller Culture Kent Research Working Group. All reports have been scrutinised and discussed by the Working Group, chaired by the Culture Kent Project Director.

The research team would like to thank all those who have been involved in the Culture Kent Research Programme, from the Project Director, to the members of the Culture Kent Research Working Group, the Culture Kent Steering Group and all the organisations and individuals who have shared their valuable insights.

Fan Bay (photo Sebastian Edge), courtesy of Dover Arts Development

3 AUDIT OF THE CULTURAL TOURISM LANDSCAPE - THE EVIDENCE REVIEW

This section provides a summary of the Evidence Review carried out as part of the 'Audit of the Cultural Tourism Landscape'.

Objective: To *evaluate the existing knowledge of the cultural tourism offer (product, destination and experience) and consumer.*

A full account of the methods and evaluation of this aspect of the Culture Kent Research Programme can be found in Report 1 (Part i- Evidence Review).

3.1 ROLE OF THE EVIDENCE REVIEW

The Evidence Review provided the framework for the Culture Kent Research Programme. It was required to ensure that:

1. the research could establish the wider context within which to position the cultural tourism offer in Kent;
2. the organisational and consumer perspectives research was informed by existing knowledge of both the cultural tourism offer (product, destination and experience) and consumer.

The synthesis of culture and the arts with tourism necessitates cross-sectoral working and, with that, a need to understand the emerging relationships between the two sectors, the profiles of cultural tourists and how cultural destinations can be developed within the visitor economy. The headline findings from the Evidence Review are interpreted in the following sections (3.2-3.5) and will be drawn upon in later sections of the report to help to contextualise the findings of the organisational and consumer perspectives research.

3.2 WHAT CURRENT TRENDS ARE INFLUENCING THE CONTEMPORARY CULTURAL TOURISM LANDSCAPE AND WHAT DOES THIS MEAN FOR KENT?

The past 10 years have witnessed economic austerity and restructuring. Within this period, tourism and the cultural sector have become increasingly prominent, both as objects of policy in their own right, and also as instruments of policy to attain the wider social and economic goals of local and national governments and the European Union. In Britain, the relatively robust nature of tourist demand, the economic promise of both tourism and the cultural and creative industries, the dominant SME and micro enterprise structure of both sectors, as well as the highly *place* specific characteristics of both sets of activities, marked out tourism and culture as vehicles to deliver the goals of economic recovery, local regeneration, and the Big Society agenda of the early days of the Coalition Government. More recently, the publication of the DCMS's (2016) *Culture White Paper* reinforces this view that 'culture has the potential to transform communities' (:9). Furthermore, the place agenda reflected in the *White Paper* takes this argument forward to establish 'culture at the heart of place-making' (:29).

Cultural organisations have responded to the challenge of falling public subsidy by, on the one hand, seeking to diversify their sources of income, and, on the other, demonstrating their value in terms of their contribution to other policy goals and outcomes, with the potential for leveraging funding from budgets across different policy sectors. A number of commissioned research reports have sought to develop appropriate methodologies for capturing and quantifying the 'spillover impacts' of arts and culture to tourism, economic regeneration and national productivity goals (e.g. The Centre for Business and Economic Research (CEBR) 2013 and 2015 reports on *The Contribution of the Arts and Culture to the National Economy*) as well as to social policy goals such as diversity, social inclusion, education and skills, and the wellbeing agenda.

Overall, tourism makes an important contribution to the income of UK arts and cultural and creative industries, just as the arts, culture, heritage, and creative industries are acknowledged to be a major feature of Britain's image and tourist appeal, adding value to the British tourism product overall. Culture is regarded as a key driver for tourism, with UNWTO figures estimating 37% of world travel undertaken by 'cultural tourists', with consistent growth (Calinao and Lin, 2017; Mayor of London, 2015). The issue of what can be understood by 'cultural tourism', however, and the nature of cultural tourism consumption, will be addressed in more detail in sections 3.3. and 3.4. Future trends in UK domestic tourism have to be interpreted in the light of the uncertainties created by Brexit and, at the time of publishing this report, a period of heightened security related to terrorism, identified in VisitEngland's recent Trends Report as an aspect of a societal shift towards more precarious living (VisitEngland/Foresight Factory, 2017)[4]. Of real interest to the regional market are the figures reported from the *Great Britain Tourism Survey* that 'the number of VFR trips rose by 13% in 2015… the highest recorded total since 2006.'[5] Whilst the 2016 figures (*GB Tourism Survey*[6]) show a plateauing of this growth, the VFR market still represents a significant market for consideration.

An important trend in the cultural tourism landscape is the proliferation of cultural tourism styles and modes of consumption, beyond sightseeing and visiting heritage. Smith (2016) identifies a recent trend towards *creative tourism*, spearheaded by UNESCO, which in 2004 launched its *Creative Cities Network* and set about defining and building a creative tourism movement as a sustainable development strategy. UNESCO defines creative tourism as '… travel directed toward an engaged and authentic experience, with participative learning in the arts, heritage, or special character of a place, and it provides a connection with those who reside in this place and create this living culture' (cited in Smith 2016).

The analysis of current trends in the cultural tourism landscape reveals important opportunities for developing the sector in Kent. The emerging cultural and creative tourism model demonstrates the evolution of tourism from 'service industry' to 'experience economy', with, at its heart, an extremely broad and fluid understanding of culture and cultural consumption. Arts and cultural organisations have the capacity to play a key role in place-making and in the generation of innovative new experiential products for tourism, whilst tourism can contribute to the growing of audiences and markets for arts and cultural organisations. Kent's proximity to London, and the presence within the county of a UNESCO World Heritage Site, offers opportunities to capitalise on the inbound tourist market and its appetite for cultural consumption. On the other hand, the UK domestic market has the potential to make positive connections with a smaller scale and more localised cultural tourism offer, which plugs into local communities and offers opportunities to discover and connect with an *authentic sense of place*. Here again, the proximity to London is an important advantage – this time, as a source of domestic tourism. The Evidence Review reveals complementary interests and agendas for arts/culture and tourism in Kent, particularly around the regeneration of the seaside towns and post-industrial inland locations, with scope for collaboration in developing innovative kinds of cultural and creative tourism to revitalise the domestic tourism offer.

[4] https://www.visitbritain.org/future-trends
[5] https://www.visitbritain.org/annual-review/annual-review-2015-16/domestic-tourism-rise-2015
[6] https://www.visitbritain.org/gb-tourism-survey-2016-overview

- The changing funding environment for culture and the arts in the UK in the ten years up to 2016 saw a drive to diversify sources of income beyond the traditional reliance on the public sector, and a continuing evolution in the understanding of 'culture' as incorporating the commercial creative industries, as well as, in the context of tourism, authentic cultural encounters connecting visitors with a strong sense of place.
- Tourism makes an important contribution to the income of cultural organisations, just as culture is a key element of the UK's tourism offer. With its proximity to London, Kent has a great source of both inbound and domestic tourists on its doorstep.

Turner Contemporary, Margate. Image courtesy of Turner Contemporary

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

VisitBritain's overview of culture and heritage (Visit Britain, 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;) point out 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 – it could relate equally to a deep engagement with museum objects, or a fondness for the venue's overall atmosphere (Culture24, 2012). As Lord (1999) points out:

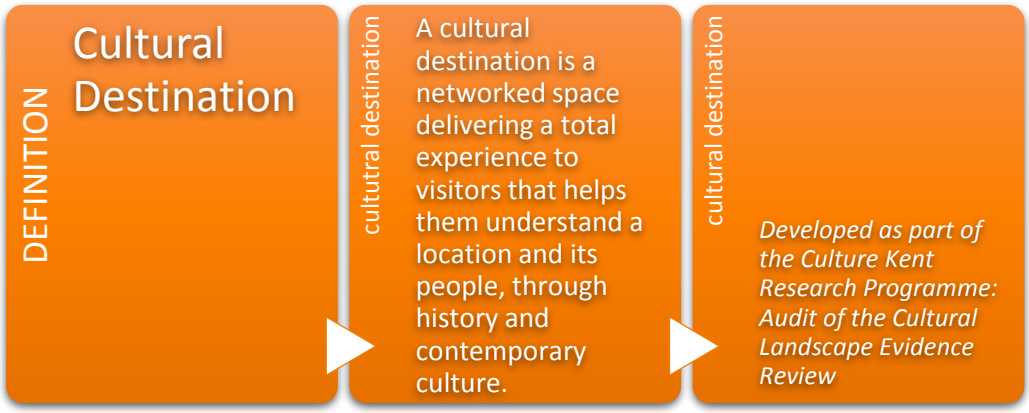
> 'You must constantly remember that while we may make a distinction between visits to restaurants and sports events, and visits to museums and other cultural attractions, tourists do not – **they seek a total experience that helps them understand a location and its people'**. *[Emphasis added]*

Partnerships, argues Lord (1999), are key mechanisms for linking up different types of cultural and non-cultural product in a destination, in order to appeal to different market segments and increase the length of stay.

The evidence reviewed highlights that, of importance to a cultural destination is a healthy underlying 'creative economy', or 'creative milieu', characterised by an attractive public realm, a creative workforce, local audiences and community engagement that sustain cultural attractions and activities year round. From this perspective, the cultural tourism destination can be viewed as a spillover effect of a thriving cultural ecology with strong connections to place. Turning a *creative place* into a *cultural destination* is largely a matter of bringing out the essential qualities and features of a place 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 mediating the sense of place, in particular meeting the growing demand for spontaneous and authentic cultural experiences by directing visitors to lesser known cultural attractions and 'alternative' venues (Palmer 2013).

Generally, the quality of **authenticity** emerges as a key feature of the cultural tourist experience. However, this is something of a black box term, the precise nature of which is hard to pin down. Whilst it clearly combines elements of the serendipitous and spontaneous, in the context of a cultural tourism destination it is also the product of a complex supply chain comprising a wide range of expertise, orientations and values, and including curators, writers, artists, performers, audiences and publics, as well as spatial planning and place-making activities, transport and accommodation providers, marketing and digital technology. This complexity is reflected in the working definition of the cultural destination developed from the Evidence Review (*Figure 2*).

Figure 2: Definition of a Cultural Destination



This working definition 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 points the way towards new kinds of partnership and collaborative relationships, in which location and proximity, rather than sectoral identification, play the crucial role.

- Cultural tourists do not make the same 'supply side' distinctions between destination attractions and cultural activities as professionals working in the field. Thus, it is important to understand the ways they make sense of, and navigate, a cultural destination.
- Understanding the way that the cultural tourism value chain works in terms of visitor experience is also crucial to delivering the sense of place visitors are looking for. Building and maintaining collaborative relations between organisations and across sector boundaries will be essential in achieving this. Also crucial to the success of cultural destinations is the health of the underlying creative economy.

Urban Playground, bOing! Festival (photo Manu Palomeque), courtesy of Gulbenkian

3.4 How can cultural tourists be profiled, with specific reference to their motivations, decision making and behaviour?

The Beaney House of Art and Knowledge. Image courtesy of Visit Kent

VisitEngland's review of domestic leisure trends (Trajectory Global, 2013) reveals a number of trends of particular relevance to the cultural tourism consumer; namely: increasing time pressures and responsibilities, a focus on quality time and 'treats', a move to multi-generational holidays, and a shift from conspicuous consumption to achieving social status through the acquisition of cultural capital, knowledge and skills, 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).

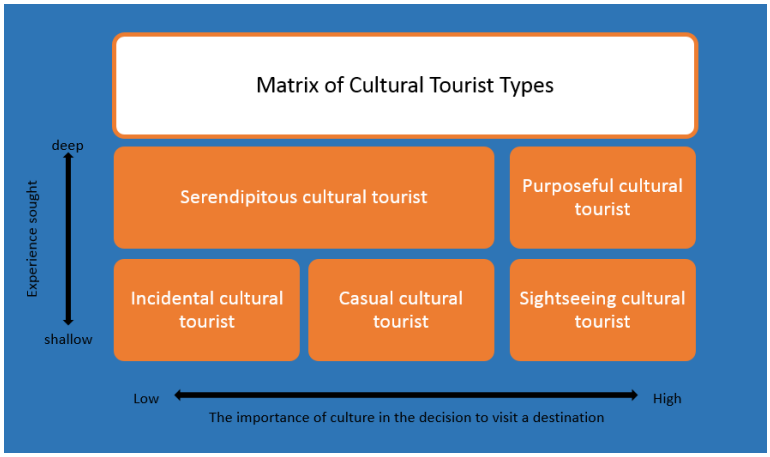
From a Kent perspective, these trends highlight the importance of understanding how Kent and its cultural experience are currently perceived by visitors and non-visitors in order to inform how it should position itself as a cultural destination. This has been addressed by the Culture Kent Research Programme in its examination of the motivations, perceptions, demographics and experiences of current and potential cultural tourist markets to Kent. If authenticity is increasingly important to the cultural tourist, then how can this inform the positioning of the county and the targeting of key target markets? Moreover, as Lehman et al (2014) ask, 'what are the key parts of the art/culture supply chain in the 'production' of authenticity? What do supply chain organisations have to do to establish authenticity and communicate it to their consumers?'

Corresponding to these evolving trends in cultural tourism consumption, the profiling of cultural tourists has moved on from the generalized stereotype of the older, higher income professional, likely themselves to be in an occupation connected with culture, to a more nuanced understanding of a cultural tourism continuum, consisting of

> 'not a single market, but rather a heterogeneous area extending from incidental encounters with cultural contents to travel caused by the clear intention to satisfy the specific cultural needs in certain destinations' (Jovicic 2016:610).

Whilst, at the most superficial level, the main motivation of cultural tourists may still be regarded as the drive 'to learn, discover and experience more about the destination visited' (Cetin and Bilgihan, 2016:140), attention is increasingly drawn to the varying degrees to which culture and cultural experiences are core or peripheral to the motivation and experience of visitors to a destination. 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 3) identifies five cultural tourist types:

Figure 3: 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 more detailed evidence review (Report 1– part i) documents the application of this model in both the *Cultural Tourism Vision for London 2015-2017, Take a Closer Look* (Mayor of London, 2015) and Failte Ireland's (2012) *A New Strategy for Cultural Tourism in Ireland*. A closer analysis of the strategic intent behind Failte Ireland's (2012) approach highlighted that using such a segmentation framework has allowed them to make advances in the consumer focus of their cultural tourism strategy. A move towards understanding the full range of cultural tourism consumers (from purposive to the Incidental cultural tourists), thus, has been transformative. It has allowed them to move from a narrow focused strategy, based on a stereotypical understanding of cultural tourists, to a more comprehensive appreciation of the heterogeneity of cultural tourists and the variety of ways in which they engage with various parts of the cultural tourism offer whilst at a destination. The Culture Kent consumer research (section 6) applied this model to identify the relative importance, for Kent cultural tourists, of culture in the decision to visit Kent (level of engagement with culture) and the depth of experience sought (from shallow to deep).

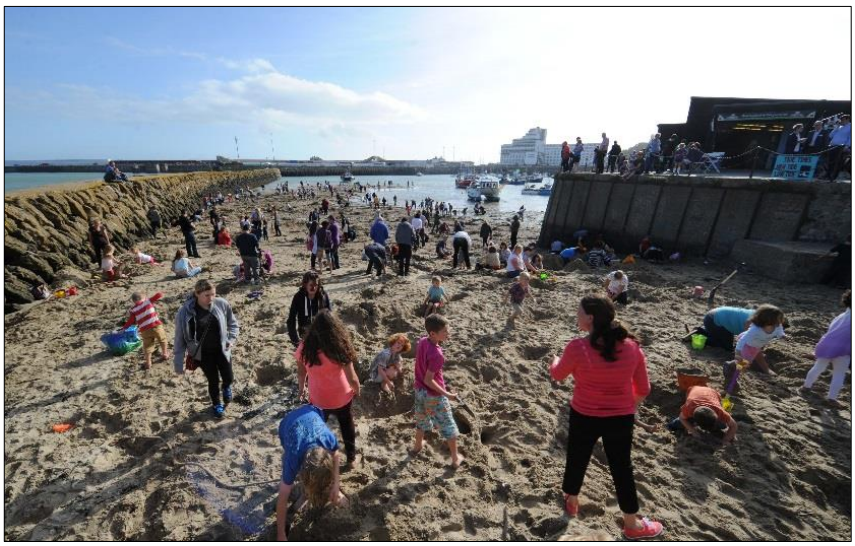
The recognition that cultural tourism can mean different things to different people – and that a large proportion of potential consumers may not actually perceive themselves as cultural tourists at all – has significant implications for identifying and communicating with target markets, and the way that culture/arts are reflected in marketing communications. Moreover, there has been a revolution in the way in which consumers search for, and are influenced by, information sources, and, in turn, share experiences related to cultural tourism:

> 'How tourists discover culture is … changing, with technology, independent digital media and even tourists themselves taking the lead' (Mayor of London, 2015:29).

Nurturing positive and enduring relationships with key consumers is important for building destination loyalty, which has been found to be a critical factor in a destination's competitiveness and long-term success. A study by Kastenholz *et al* (2013) concluded, with reference to McKercher and Du Cros's matrix of cultural tourist types, that casual, incidental and serendipitous culture tourist types showed the greatest association with destination loyalty. 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 behaviours 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.

- There has been a shift in cultural tourism from *seeing* to *experiencing*, making the relationship between the cultural tourism provider and the consumer more important in differentiation and the creation of an authentic experience/sense of place.
- Cultural tourists cannot be represented as one single market. Attention needs to be paid to the varying degrees to which culture is core or peripheral in terms of their motivation and their depth of experience at the destination.
- A large proportion of potential consumers may not see themselves as cultural tourists, but will engage with a variety of cultural/arts activities. Understanding how consumers view themselves has important implications for the way in which culture and the arts are reflected in marketing communications.



Folkestone Digs by Michael Sailstorfer, Folkestone Triennial 2014 (photo Stuart Wilson), courtesy of Creative Foundation

3.5 What are the opportunities and barriers to cross-sectoral working between tourism and culture from an organisational perspective?

Research by King's College (a 'cultural enquiry into partnerships'), authored by Ellison (2015), found that multiple partnerships are now a fact of life for UK cultural organisations of all sizes. Nevertheless,

> '… there is a lack of coherence in how it is used and what is understood by it. The sector does not have its own definition or set models. "Partnership" we found to be an umbrella term, encompassing a wide range of collaborations at national, regional and local level' (Ellison, 2015:3).

Models such as 'cultural ecology' or 'eco-system' (Warwick Commission, 2015) and 'cultural and creative spillovers' (Fleming, 2015), which are widely used to capture the 'flows' by which benefits are spread between sectors and to the wider society, often focus on macro effects at national, regional or local level, rather than on the level of the organisation or the organisational interactions which are critical agents in the production of these effects. This gap has been addressed by the Culture Kent Research Programme through its organisational perspectives research.

Maidstone Museum. Image courtesy of Visit Kent

The evidence from the literature shows that, whilst it is evident that the arts/cultural and tourism sectors share a number of interests, particularly with regard to the growing of audiences and creating a sense of place, the mechanisms for identifying and achieving these commonalities of interest are unclear. The 'multi-sectoral' nature of both the arts and cultural industries on the one hand, and tourism on the other, adds to the difficulty, where goals are often articulated in very different ways – for example, community resilience and local attachment to place for culture/arts and destination branding or creating 'products' for visitors in more of a tourism context. Both are also composed of predominantly small and micro-scale organisations, whilst in addition the tourism sector contains both public and private sector actors, many with a commercially driven agenda.

What are the opportunities for cross-sectoral working?

Collaborations require a catalyst – the recognition of a shared goal and vision, an opportunity to realise that goal, and the existence of an enabling environment to encourage and support organisations in recognising and exploiting opportunities. According to research by King's College (Ellison, 2015), responding to funding opportunities is an

important stimulus to developing partnerships, but may end up producing fragile, one-off or short-term partnerships. In addition to such *goal-oriented* partnerships, King's College identifies two other major alliance modalities:

- *resource-based* – complementing/supplementing capacity; reducing transaction costs, increasing value for money and enabling economies of scale; and
- *network-based* – loose group of organisations (including local, regional, national or international hubs) to make contacts, share information, and to discuss shared aims and funding opportunities (Ellison, 2015:15).

The evidence suggests that resource-based collaborations can be an effective way of improving organisational resilience and overcoming the problems of isolation and resource constraints experienced by many arts/cultural organisations. Nevertheless, *resource-based collaborations* aimed at reducing transaction costs and achieving economies of scale are relatively few, possibly because they are perceived to be challenging to implement. *Network opportunities*, on the other hand, are currently being put in place in south-east England. Initiatives such as the South East Creative Economy Network aim to connect businesses with potential partners, investors, business support services and peer-to-peer knowledge exchange networks (South East Creative Economy Network, 2016). More specifically in Kent, the Kent Cultural Transformation Board has the 'primary aim to grow and develop the creative and cultural industries within Kent; connecting cultural organisations, creating opportunities for them to engage with each other, determining strategic priorities and opportunities and delivering activities in order to drive sustainable sector-led growth.'[7] Notably, both the South East Creative Economy Network and the Kent Cultural Transformation Board have recently identified cultural tourism as a priority area.[8]

Specific opportunities for collaboration between the tourism and arts/cultural sectors are discussed in the detailed Evidence Review, and are explored in the organisational perspectives research.

Perceived barriers to successful collaboration

One of the most commonly reported barriers to collaboration is the **perception of difference**, particularly in relation to organisational culture. Organisations outside the sector – such as local authorities – may be perceived as speaking 'an entirely different language',[9] or working within different operational parameters – such as the electoral cycles of government. Nevertheless, difference can present an opportunity, where complementarities are identified that may either compensate for gaps within an organisation, or magnify shared strengths.

In the case of cross-sectoral collaborations, the cultural industries are seen as key for shaping and meeting the demands of the growing 'experience economy', and for pioneering innovative forms of governance and ways of working, as well as innovative products and approaches to the market. In the context of the European City of Culture Programme, arts and cultural organisations are credited with having introduced new approaches to working with stakeholders and new technology, and more flexible methods and structures (Fleming, 2015). However, radically different organisational cultures can also be seen as an obstacle to partnership working.

Articulating and agreeing differing expectations at the outset of a collaboration, and taking time to develop relationships and set goals, are identified as critical factors for partnership success (Dawson and Gilmore, 2009). However, understanding the strengths and limitations of partners may be more difficult where the partnering organisations are very different in terms of scale (e.g. national versus local) or organisational culture. In some cases, responsibility for the success of the partnership may be left to those who are too senior or too busy to be able to

[7] Kent Cultural Transformation Board's Terms of Reference

[8] The Kent Cultural Transformation Board has identified cultural tourism as one of its six strategic themes.

[9] Mary Swan 'Local Authorities: Time to Look After the Ecology' 2/11/2015 http://www.whatnextculture.co.uk/local-authorities-time-to-look-after-the-ecology/

dedicate the proper amount of time, or to junior members of staff with no authority to make decisions. In this regard, it is important to recognise that partnerships often impose **increased costs**, which may take the form of membership subscriptions, or an additional human resources burden with regard to coordination, communication, attending meetings etc. Building relationships also takes time and resources.

The experiences emerging from the Evidence Review underscore the importance of knowledge and communication for successful collaborations. The 2015 report on *Cultural and Creative Spillovers in Europe* points to the need to develop:

> … hybrid and cross-sector spaces and places that allow for structured and unstructured knowledge transfer between the arts, cultural and creative industries, and wider business, social and technological sectors (Fleming, 2015:9).

A key focus of Culture Kent has been on collaboration and partnership working. Organisational research through the Culture Kent Research Programme explored this further in order to make recommendations as to how future cross-sectoral working can be facilitated through both existing bodies, such as the Kent Cultural Transformation Board, and through more informal networks.

As a final point, it is worth emphasising a King's College research finding, that only 57% of their sample had actually carried out an evaluation of the partnerships in which they were involved. 'Evaluation is often considered too difficult and gets neglected or reduced to highly subjective judgements' (Ellison, 2015:29). Compounding this difficulty is a lack of clarity over what constitutes 'success'. Establishing a clear and uncomplicated methodology for monitoring and evaluating partnerships is, thus, fundamental to effective evaluation.

- The Evidence Review found plentiful references to key models such as cultural ecology and creative spillovers, which explain the flows and benefits between sectors and to the wider society, but identified a gap in the understanding of these relationships and processes at the level of individual organisations. The research carried out by the Culture Kent Research Programme put individual organisational perspectives at its heart, and has made an important contribution to filling the evidence gap.
- One of the most commonly reported obstacles to collaboration is the perception of difference, particularly in relation to organisational culture.
- Goal-oriented partnerships formed in response to e.g. one-off funding opportunities can be fragile and have a short timescale in which to develop and take root. This makes it all the more important for such collaborations to work on developing their legacies, in the form of:
    - robust evaluation, linked to clear measures of success and lessons learned;
    - benchmarkable data; and
    - effective dissemination, as widely as possible, to key stakeholders.

4 AUDIT OF THE CULTURAL LANDSCAPE - THE AUDIT OF THE KENT CULTURAL PRODUCT AND EXISTING METHODS OF DATA COLLECTION

This section provides a summary and interpretation of the audit of the Kent cultural tourism product and existing methods of data collection, which formed the second part of the Audit of the Cultural Tourism Landscape. These two parts of the audit provided a better understanding of the cultural tourism offer in Kent as well as an indication of how important collecting and interpreting data is for both cultural/arts and tourism organisations. It thus provides a better understanding of what is currently being done, highlighting opportunities for the future. A full account of this area of the research can be found in Report 1 (Audit of the Cultural Tourism Landscape- part ii)

4.1 AUDIT OF THE KENT CULTURAL PRODUCT

An audit database of cultural tourism organisations in Kent was put together to provide a better understanding of the cultural tourism landscape in the county and where the strengths and the opportunities lie, and has provided a valuable repository of information that can be built upon. With almost 400 organisations listed, this is a very useful tool for future communications. The database also classifies these organisations in terms of the activities they deliver, allowing for a better understanding of geographical strengths and opportunities. Other information captured includes full postal address, contact details, web address, social media channels, notes on main activities, primary and secondary classifications (if needed), as well as geographical coordinates.

Challenges: The initial categories (agreed by the Culture Kent Research Working Group) used for 'type of provision' were: Art Galleries, Creative Activities, Event Organisers, Festivals, Museums, Music Venues, Public Sector, Theatres and Cinemas. A 'multiple provision' option was added because some organisations fitted into more than one category.

Despite the initial aim of focusing more on contemporary forms of cultural tourism, we understood that Kent's identity as the county with the largest number of castles and stately homes meant we could not separate culture and heritage. As a result, we added an extra classification, Heritage, to embrace the unique selling points the county has to offer. We argue this is not a limitation, but an opportunity to explore further the cultural tourism landscape in Kent, finding common ground.

Another important note that needs to be considered is that this database is not a finished product, but mostly a working document, which needs regular maintenance and updating. It is a useful database, which can be used in multiple ways, and the added coordinates offer the option for future mapping, should this be found useful.

Canterbury Cathedral. Image courtesy of Visit Kent

4.2 ONLINE SURVEY- AUDIT OF THE EXISTING DATA COLLECTION METHODS AND TECHNIQUES

An audit of existing data collection methods and techniques was conducted online, via a SNAP survey, which was sent to a sample of 30 organisations (currently involved in Audience Finder (AF), interested in AF and key tourism organisations - defined as a 'key tourism organisation/visitor attraction that attracts visitors and local residents for leisure purposes').

The purpose of this audit was firstly to identify organisations' current research practices, looking at what data is currently collected and identifying the methods and approaches used. The survey aimed to establish the regularity of data collection, and over what time periods this was conducted. Organisations' aspirations were also investigated in terms of looking at what data organisations are seeking to gather, and in what way they wish to utilise findings in the future.

4.2.1 Top line findings

- Interestingly, over 95% of all organisations conduct audience/visitor research. For the ones who do not, the main reasons are: they have not identified the need for research; lack of budget and/or necessary staff.
- 69% of all organisations stated that they look at existing external secondary research when planning their own activity. This was found to be particularly high among organisations who currently use Audience Finder.
- Only 25% of tourism organisations stated they used paper questionnaires, alongside 39% stating they use email questionnaires.
- Whilst all existing AF organisations and 50% of tourism organisations stated they gather information on the influence of marketing activities, none of 'potential AF organisations' assessed this aspect of motivation.
- 'Potential AF organisations' predominantly analyse findings in-house (82%), while 'existing AF organisations' most commonly use both methods (60%).
- For those organisations conducting research digitally, a major challenge highlighted was the reliance on one database for all surveys, making the data less accurate and diluted.
- *Budget* and *money* were commonly cited by both 'tourism' and 'potential AF organisations' as major barriers to conducting research. 'Potential AF organisations' also expressed concerns over *planning.*
- When asked what information they are looking to gather and what is the objective of the research, all respondents wanted to understand who their visitors are. Looking at chosen targets for research, all organisations are interested in learning more from/about their existing customers, followed by 72% who wanted additionally to gather data about potential customers.
- There was a reluctance from 'tourism' organisations to share aspects of research, with 38% saying that they would not be willing to share this type of information.
- The majority of organisations stated that they would be interested in future involvement with Culture Kent, although 11% of tourism organisation answered 'no' and 33% of tourism organisations stated they were 'not sure'.
- 38% of 'tourism' organisations stated that they would consider using Audience Finder and 57% of 'potential AF' organisations expressed an interest in using Audience Finder in the future. This interest and potential scope to introduce Audience Finder indicates that, to an extent, Audience Finder could be used on a larger scale across the sectors.

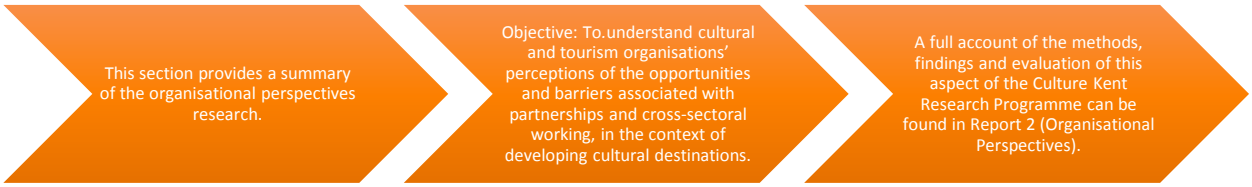
A more detailed analysis is available in the full report (Report 1- Part ii). To reiterate, some of the key learnings are around the fact that, although everyone does collect data to a degree, the biggest challenge is resources. A significant proportion of the organisations stated they would be willing to share research findings with other

stakeholders, some would even share methodologies (72%) and 55% would be willing to share audience data. This provides an important learning, and it is something that should be explored further, as this could potentially cement stronger collaborative and cross-sectoral work.

For more detailed findings and evaluation developed from this area of the Culture Kent Research Programme – please view the full report: Culture Kent Research Report 1: The Audit of the Cultural Tourism Landscape (Parts i and ii).

Coat for a Boat Exhibition, Turner Contemporary (photo Jess Limbrick), courtesy of Turner Contemporary

5 ORGANISATIONAL PERSPECTIVES ON COLLABORATION/PARTNERSHIPS AND CROSS-SECTORAL WORKING



5.1 CONTEXT AND METHODS

Partnerships and collaborative working have been central to Culture Kent and the wider ambitions of the *Cultural Destinations Programme.* To help Culture Kent achieve a key aim to grow partnership capacity and facilitate cross-sectoral working, research was required *to understand tourism and cultural/arts organisations' perceptions of the opportunities and barriers associated with cross-sectoral working, in the context of developing cultural destinations*.

Drawing from the findings of the Evidence Review (*see Report 1- Audit of the Cultural Tourism Landscape*) the organisational perspectives research was designed to address the following areas:

- **Context** – the importance of partnerships and collaborative working;
- **Reflections** – experiences of cross-sectoral working (tourism and culture/arts);
- **Perceived benefits** – of partnerships and cross-sectoral working;
- **Critical success factors** – to achieving successful partnerships and cross-sectoral working;
- **Barriers** – barriers/challenges impacting on organisations' abilities and openness to cross-sectoral working;
- **Ways forward** – how future cross-sectoral working can be facilitated more effectively.

To address these areas, a multi method approach was initially developed to include:

- **An online survey of cultural/arts and tourism organisations operating in Kent:** This survey was sent to both Visit Kent's and Culture Kent's business databases in July 2016, to a total of 350 organisations (where full email and contact details were available). 62 organisations from both the tourism and cultural/arts sectors responded, 32% of whom identified themselves as predominantly tourism organisations and 68% as working with the cultural/arts sector, giving a total response rate of 17.7%.
- **12 semi-structured interviews with a range of organisations across the sectors:** Organisations were purposively sampled to reflect a range of organisations across the tourism and cultural/arts sectors, with differing levels of engagement with Culture Kent (Pilot Project Leads, Pilot Project stakeholders and those who had no engagement with Culture Kent) and from across Kent geographically, to ensure that organisations operating in east, mid and west Kent were included in the sample.

A mid-term evaluation of these findings prompted a discussion about the need to ensure that the learnings from Culture Kent and, more specifically, the experiences of the six Culture Kent Pilot Projects, were widely disseminated across the sectors. To address this all six Culture Kent Pilot Leads were interviewed in order to produce six case study summaries (*reflective accounts*) to disseminate reflections and lessons learnt from the pilot projects, and a Round Table Discussion Event – attended by 25 stakeholders involved in the Culture Kent Pilots – was held to develop further discussions of best practice and legacy/ways forward. This aimed to provide

an accessible output/legacy for Culture Kent from which everyone could learn. Whilst this area of research was designed to produce concise *industry 'toolkit style'* documents for dissemination across the sectors, these also provide additional evidence to support the examination of organisational perspectives and, where appropriate, are referred to in order to support the findings from the online survey and the semi-structured interviews.

The primary research that informs these findings, therefore, comprises 62 online surveys, 12 semi-structured interviews across the sectors, 6 Culture Kent Pilot Project Lead reflective interviews and a Round Table Discussion Event attended by 25 stakeholders involved in the Culture Kent Pilots. The strength of the evidence, therefore, emerges from the combination of methods that have been used together to inform the analysis, the key findings from which are reflected below.

5.2 KEY FINDINGS

5.2.1 Existing levels of partnerships and cross-sectoral working

The online survey supports a strong level of engagement with partnership working across the tourism and cultural/arts sectors, and the majority of the organisations within the online sample stated that they are actively involved in the place/destination. More in-depth analysis produced from the Evidence Review and the interviews seems to support the contention that we are reaching a level of maturity within the tourism and cultural/arts landscape, where a variety of drivers, both positive and negative, are converging to encourage the need for more cross-sectoral working. The picture, however, is complex, and whilst the conditions may indicate that this type of collaboration could be beneficial, the online survey highlighted that not all organisations are aware of the potential benefits of working in this way. When questioned, only 44% of the online survey stated they had aspirations for future cross-sectoral working. This highlights that there is still a need to disseminate information and raise awareness of the potential benefits of cross-sectoral working between tourism and culture/the arts. Furthermore, there is a need to understand what could be preventing organisations from considering the opportunities of cross-sectoral working.

> The research supports a strong level of engagement with partnership working in tourism and cultural/arts organisations. The Evidence Review and interviews seem to support the contention that we are reaching a level of maturity where positive and negative influences (drivers) are converging to encourage the need for cross-sectoral working. However, awareness of the potential benefits of such collaborative working across the sectors is not widespread amongst organisations in Kent. Therefore, there is a need to understand what could be limiting organisations' aspirations for future cross-sectoral working and raise awareness of the potential benefits that can be achieved.

5.2.2 Sectoral positioning

The starting point for the organisational research was a two-sector model, in which 'tourism' and 'culture/the arts' were conceptualised as forming two separate spheres. The research has supported the argument that this separation is embedded in the institutional landscape of national sectoral organisations, and is also a widespread mind-set encountered *on the ground.* Closer analysis of organisational practice, via the interview research, reveals a much more nuanced and complex reality. One of the major findings of the research has been that:

- in reality, organisations are positioned across a 'sectoral continuum' reflecting a high degree of fluidity in organisational positioning across the sectors; and yet –
- a 'two sector mind-set' still exists in institutional/organisational thinking, compounded by perceptions of difference with regard to priorities, language, and philosophy.

The 12 organisations sampled for the semi-structured interviews were classified and coded in terms of their focus in the tourism sector (1-T, 2-T), where tourism was a wider part of their conservation mission (3-t, 4-t), mixed offer visitor attractions/museums (5-MO, 6-MO and 7-MO) and cultural/arts focus (8-C/A, 9-C/A, 10-C/A, 11- C/A and 12-C/A). Whilst each organisation was anonymised and allocated a code to enhance the validity of the findings, a summary of their key characteristics can be found in Table 1 of the full Organisational Perspectives Report, to provide further context to the analysis.

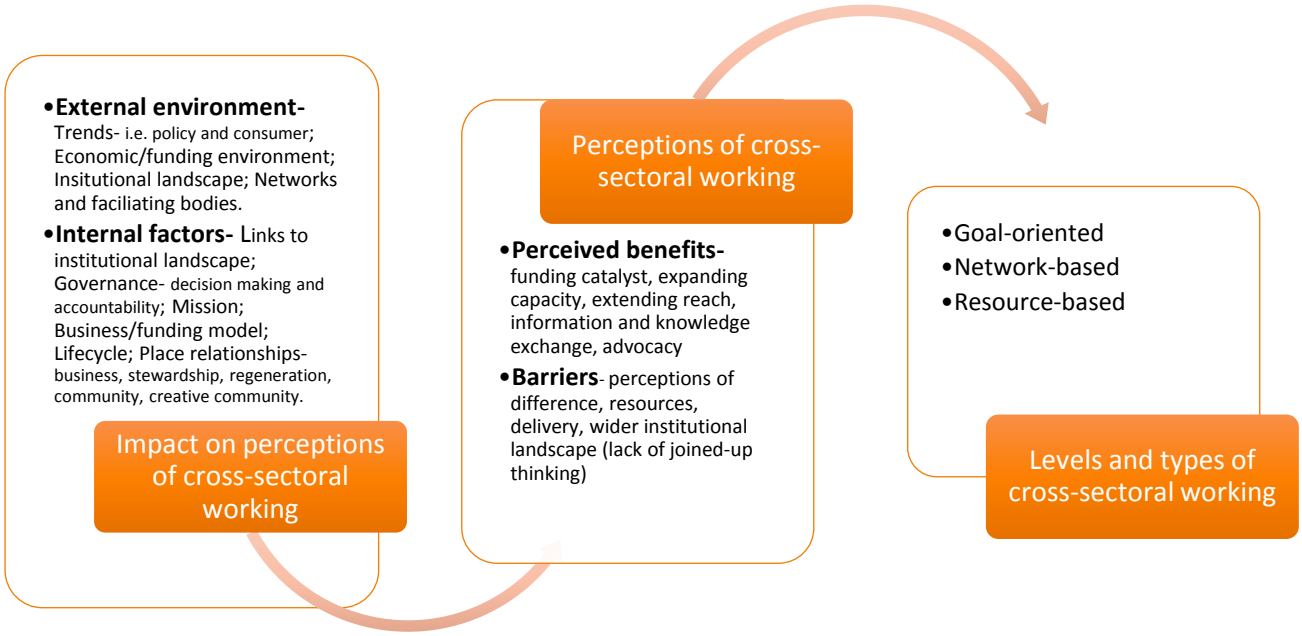
Whilst evidence from the interviews suggests that those working in tourism and cultural/arts organisations share perceptions of identifiable sectoral divisions, the *reality* of how organisations operate and position themselves within these sectors shows considerable variability. The interviews revealed a fluid association across the sectors, depending on the organisation's mission, model of governance and institutional framework, the nature of their offer, and the way in which visitor experience is integrated into their mission/activities.

5.2.3 Understanding the levels and types of cross-sectoral working

In seeking to understand the levels and types of cross-sectoral working amongst the organisations interviewed, organisational structure, governance models and the wider environment within which the organisations operate, were found to be key factors, which, in complex interplay with each other, influence levels of partnership and cross-sectoral working.

Figure 4 (over page) outlines a model for understanding how factors in the external and internal environment impact on the diverse levels and types of cross-sectoral working in evidence. An important feature of the model is that it seeks to capture a dynamic process, rather than describe a static situation. Thus changes in the external environment – for example, in economic conditions, the funding environment, or consumer or policy trends – may produce internal adjustments, in terms of organisational mission, focus of activities, and growth strategies. These, in turn, have an impact on the perception of opportunities and barriers with regard to cross-sectoral working. The perception of difference – which, at the level of organisational culture, is often cited as a barrier to collaboration – can also be seen as a strength, when viewed from the perspective of a growth-oriented organisation seeking a source of complementary data, skills, or resources, in order to expand their capacity.

Figure 4: External and internal factors influencing levels and types of cross-sectoral working (Collaborative Preferences)



Relationship to place: The research also showed that place identification (*organisations' relationship to place*) is significant for organisations in a number of ways, and at a variety of levels. Place relationships expressed in terms of institutional affiliations and networks are reflected in both the External Environment and Internal Organisational boxes of Figure 4. However, the five-fold typology of organisational relationship with place, expressed in terms of Business, Stewardship, Regeneration, Community, and Creative Communities, which was developed through the interview analysis, has been categorised amongst the internal factors, because of its strong links to *organisational mission* and *business/funding model*. The organisations whose mission and business model is most strongly tied to community and local development goals – categorised under Regeneration and Community, and, to a lesser extent, Stewardship – are those whose organisational resilience is most closely bound up with local community resilience. These include both cultural/arts organisations, for whom the wider community remit is often a condition of funding, and also conservation oriented tourism organisations, who have found a way to build support for their conservation mission through the visitor economy. The relationship with place may also be strong in the 'Business' or 'Creative Community' oriented organisations, but it is articulated in different ways, often through more commercial relationships, or at national or international levels.

The nature of collaboration: The Evidence Review identified three different modes of partnership working:

- goal-oriented – short term, often one-off, fragile and formed for a particular purpose (e.g. funding application consortium);
- network-based – loose group of organisations (including local, regional, national or international hubs) to make contacts, share information, and to discuss shared aims and funding opportunities; and

- resource-based – complementing/supplementing capacity; reducing transaction costs, value for money and economies of scale – posing the greatest challenges for implementation.

All of these different types of collaboration were represented in the organisational interview sample. Whilst the Evidence Review seems to suggest a progression from the ad hoc nature of goal-oriented collaboration to the more structural collaboration implicit in the sharing of resources, the evidence from the interview sample suggests organisations favouring different styles and degrees of collaboration for different strategic purposes, ranging from one-off funding bids, to sharing audience data and accessing new markets, to improving service quality or mission delivery. Furthermore, it suggests that, whilst organisations may move through 'deeper' modes of collaboration as they 'learn' to do partnership working, collaborative preferences are also a product of the external environment, internal organisational factors, and associated perception of opportunities and barriers, as shown in Figure 4.

In seeking to understand the levels and types of cross-sectoral working amongst the organisations interviewed, organisational structure, governance models and the wider environment within which the organisations operate, were found to be key factors, which, in complex interplay with each other, influence levels of partnership and cross-sectoral working.

5.2.4 Perceived benefits of cross-sectoral working

As the Evidence Review highlighted, it is well understood that arts/culture and tourism sectors share a number of interests, particularly with regard to the growing of audiences and creating a sense of place; however, there is a gap in the understanding of how these shared interests operate at the level of individual organisations.

Part of understanding what opportunities organisations perceive there to be from cross-sectoral working, concerns the benefits organisations, or individuals working within them, feel they can achieve through such working practices. This research did not set out to evaluate actual benefits in terms of outcomes/outputs of previous cross-sectoral working. However, it focused on exploring survey respondents' and interview participants' perceptions of what benefits cross-sectoral working could bring to their organisation. The full report (Report 2: Organisational Perspectives) details how these perceptions are filtered through/impacted upon by:

- organisational/individual mind-sets;
- previous experiences of partnership/cross-sectoral working (both organisational and individual);
- awareness of opportunities and benefits; and
- governance structure of the organisation and the institutional landscape with which it connects.

The online survey tested how significant various factors were in organisations' decisions to engage in cross-sectoral working, amongst the organisations who had previously stated they had engaged in this type of collaboration. At one level, these could be considered drivers for collaborative working, and they give some indication of areas in which organisations feel cross-sectoral working can benefit them, in relation to **resources** (tapping into the other partners' expertise and resources to expand their own), **funding opportunities**, **extending reach**/increasing visitor numbers, **marketing and PR**, and **sharing** evaluation, data and best practice. Overall, the factor most frequently selected across all organisations as 'very significant' was *tapping into the partners' resources to expand their own*, whilst *sharing evaluation work, data and best practice* was found to be 'not significant' by the largest number of organisations (16%) (although this percentage is still relatively small).

When assessing significant factors from the perspective of organisations by sector, for tourism organisations the motivation to *tap into other partners' resources to expand their own* was extremely strong, and all the other areas

were perceived to be significant to a large proportion of the organisations. The only notable exception was that 20% of tourism organisations felt that *sharing evaluation work, data and best practice* was not significant. From the cultural/ arts sector organisations' perspective, common factors identified to be 'very significant' included both *new marketing and PR opportunities* (59%), alongside *joint capacity to extend reach and grow visitor numbers* (55%).

The **interview** data allowed the analysis to drill down beyond the simple identification of areas where perceived benefits drive the decision to engage in cross-sectoral working, to understanding the organisational contexts shaping these perceptions. When the interview data across all 12 organisations were analysed, four key themes emerged:

- **Funding** – This was a key driver of partnership formation for a number of the organisations in our interview sample, regardless of their sector. In a period of contracting public funding, those organisations who rely on a variety of funding streams to support wide-ranging projects found that formal partnerships bring access to larger funding pots and provide the funds to develop additional activities (6-MO, 7-MO, 4-t). This was felt particularly strongly by the one organisation located within the public sector and owned by the local authority (7-MO), where partnerships are required in order to access funding and share resources.
- **Diversification and enhancement of the core offer (extending reach)** – Collaborative working can also be seen as a way to allow organisations to diversify and enhance their core offer, across the spectrum from more tourism focused to more culture/arts oriented organisations. Strikingly, it is the organisations who see the benefits of partnership working primarily in these terms who tend to have a lower level of *cross-sectoral* engagement. Organisations seem more ready to enhance their core offer/organisational focus when they perceive a need to diversify and enhance their offer. The two organisations drawn from a tourism/heritage perspective discussed their diversification initiatives, aimed at including culture and the arts in their offer, in terms of recent trends linked to the emergence of higher levels of consumer expectations, with the rise of the experience economy.
- **Raising awareness and advocacy** – For the two conservation organisations in the interview sample (3-t, 4-t), partnership working across both the tourism and arts/cultural sectors is a way of raising public awareness and support for achieving their core mission.
- **Access to local knowledge** – For some organisations, access to local knowledge is invaluable, and participation in more informal networks providing access to local knowledge is important for planning and programming events within the local area (3-t, 6-MO).

Perceived benefits of cross-sectoral working are impacted upon by organisational/individual mind-sets, previous experiences of partnership/cross-sectoral working, awareness of opportunities and benefits, and the governance structure of the organisation and institutional landscape with which it connects.

5.2.5 Barriers to cross-sectoral working

The survey enabled the research to identify which of the challenges identified by the Evidence Review are felt most readily by the online sample, with **resources** and **different organisational cultures** most prominent in the online sample. The interview data, however, has allowed the research team to delve deeper in order to understand how these barriers impact upon cross-sectoral working in the county. The four key types of barrier to cross-sectoral working reflect the findings of the online survey, in terms of the impact of resources and different organisational cultures, and added further insights with regard to the delivery of cross-sectoral working:

- **Availability of resources: budget, staff and time** – This was highlighted as a significant barrier to cross-sectoral working amongst the interview sample. There was a general acceptance that today's climate is

shaped by the contraction in public funding, and that this not only provides a driver to encourage partnership working, but it impacts negatively on the abilities of some organisations to have sufficient financial, staff and time resources to develop this type of collaborative work. The secondary impact of stretched financial resources is the ability of key personnel to have the time to work on innovative collaborative projects. Some organisations noted that increasing pressure on the 'day job' leaves less time to focus on the additional benefits of partnerships (6-MO, 7-MO, 8-C/A). Thus, **partnerships impose increased costs**, which may take the form of membership subscriptions, or buying into regional campaigns, or additional human resource burdens on already stretched organisations with regard to coordination, communication and attending meetings. Building **relationships and networks takes time** and the allocation of scarce resources to achieving this brings many **opportunity costs** that often require justification. This is felt particularly keenly when the governance structure requires a high level of accountability for decision making to trustees or external funders/stakeholders (5-MO, 4-t). This is a difficult area to address, since many of the outcomes of partnership and cross-sectoral working take a long time to develop and are often more difficult to measure, particularly with regard to softer outcomes, such as those related to resilience, or sense of place.

- **Perceptions of difference (organisational culture, language/terminology and mission)** – As stated earlier (5.2.2), whilst the reality of how organisations operate and position themselves shows considerable variability across a tourism-culture/arts continuum, there is evidence that particularly those working in *mixed offer* and *cultural/arts* organisations share perceptions of identifiable sectoral divisions. The interview data was explored to help understand whether these perceptions act as a barrier to collaboration and cross-sectoral working. The organisations from within the tourism sector (1-T) and the wider visitor economy (3-t, 4-t) seem less conscious of these differences in organisational culture. However, from an arts/cultural and mixed-offer perspective, the interviews do support the existence of *'silos'* (12-C/A, 10-C/A, 6-MO) creating a lack of understanding between organisations (11-C/A), resonating from both differences in language/terminology and ultimately, fundamental mission. As articulated by one arts charity: 'sectors talk a different language. Culture/arts have audiences; tourism has visitor attractions and "customers"'.

  With respect to mission, the interviews did allow the research to delve deeper into the quite complex tensions that seem to arise from an arts/cultural perspective, related to mission, their perceptions of the tourism sector, and their relevance to the visitor economy. A number of interviewees from arts/cultural organisations stressed that their organisational culture/mission is centred on *community*, *cohesion* and *inclusiveness*. This can lead to tension, or sense of lack of relevance with regard to a tourism sector seen as centred on tourists/'outsiders' (rather than 'community'), target marketing (as opposed to inclusivity), and with tendencies towards commodification (rather than intrinsic value of culture/art). Furthermore, there was some evidence of views from an arts perspective that their artistic/authentic integrity could be compromised by the presentation of the art form to a more commercially and visitor-oriented market. These tensions are captured by the Whitstable Culture Kent Pilot Project summary, where the Pilot Lead reflects that the involvement with Culture Kent has initiated a change in perspective and a realisation that authentically curated art and target marketing can work side by side:

  'We definitely learned that you can still be completely authentically focused, AND tailor your offer to the audience'
  (Catherine Herbert, Deputy Director, Whitstable Biennale- Whitstable Culture Kent Pilot Project)

  However, it had taken the involvement in the Culture Kent Pilot to initiate this change.

- **Wider institutional landscape and lack of joined-up thinking** – An essential precondition to both cross-sectoral working and the creation of a cultural destination is joined-up thinking. The interviews shed light on challenges to achieving joined-up thinking, particularly at a regional and local level and from a place perspective, where the need for more effective programming is seen as a significant issue.

- **Delivering partnership projects** – Although a wide variety of partnership models can be found, *goal - oriented partnerships* – whereby partnerships are formed in response to funding opportunities – are commonplace, but often fragile and short-term. For those organisations who rely on external funding to support partnership working, the short time scales to both tender, develop, deliver and evaluate projects is an issue. Where funding structures are highly dependent on project-based funding, the danger is that it often becomes more about fitting the project to the funding criteria rather than fitting it to the strategic needs of the sectors and region. Where such goal-oriented partnerships are formed in response to funding opportunities, it is important to ensure that such collaborations work on developing sound legacies, in the form of robust evaluation, linked to clear measures of success and lessons learned, benchmarkable data, and effective dissemination to key stakeholders.

It is essential to understand the barriers that impact on organisations related to partnerships and cross-sectoral working. The barriers impacting on tourism and cultural/arts organisations in Kent link to resources (budget, staff and time), perceptions of difference – felt particularly by the arts/cultural and mixed offer organisations, lack of joined-up thinking, and the challenges presented by the different modes of partnership working.

5.2.6 Moving forward- the creation of fully networked and meaningful cultural destinations

The previous section has provided a summary of the findings from the organisational perspectives research to allow strategic organisations within the county to understand the current landscape in Kent, in terms of the extent to which cross-sectoral links are currently being capitalised upon in the context of cultural tourism, and the opportunities and barriers perceived by culture/arts and tourism organisations associated with partnerships and cross-sectoral working, in the context of cultural destinations.

This section will endeavour to summarise the concept of a **fully networked and meaningful cultural destination**, as an indication of *'where we want to be'*. Based on the Evidence Review and insights gained from organisations working across the tourism-culture/arts continuum through the primary research, it must be noted that:

- a cultural destination needs to be meaningful from both a visitor and organisational/institutional perspective; and
- the concept of the cultural destination, when applied to Kent, requires the development of multiple cultural destinations that make sense at a regional and sub-regional/destination level.

Combining the knowledge gained from the Evidence Review with the organisational perspectives research allows the identification of a number of **preconditions to achieving a fully networked and meaningful cultural destination(s)** from both a visitor and organisational/institutional perspective:

- **place-focused cross-sectoral working** – in other words, a move from sectoral identification to networks based on location, proximity and identity;
- **an effective enabling environment**, to support and encourage organisations to recognise and exploit the opportunities in cultural tourism;
- **a healthy underlying 'creative economy'** characterised by an attractive public realm, a creative workforce, local audiences and community engagement that sustain cultural attractions and activities year round;

- **joined-up thinking** at a variety of levels, i.e. strategic planning, programming and curation of cultural destination experiences;
- a **shared goal and vision** – particularly important where the geographical focus is larger than a single destination/place;
- **perceptions of difference need to be understood and acknowledged** – where these act as barriers to cross-sectoral working, steps need to be taken to mitigate against them;
- collaboration **integrated into working practices** rather than an 'additionality';
- **time, people and resources** – collaboration and cross-sectoral working take time to develop and embed within a locality. They also require sufficient resources and leadership to be developed and sustained over time.

These preconditions constitute a set of principles that can provide the basis for understanding how Kent can move forward in terms of using cross-sectoral working and cultural tourism as a base from which to develop sustainable and resilient cultural destinations. It must be recognised, however, that many of these preconditions are dependent on sufficient investment in both financial and human resources, over a sustained period of time.

5.3 SUMMARY

Moving from '*where we need to be'* to '*how do we get there'*, the full report highlights key themes in the research giving rise to issues that need to be considered by:

- existing organisations and networks/institutional actors operating as facilitators within the wider external environment (enabler level); and
- those working within and leading tourism and cultural/arts organisations in Kent (organisational level).

These are summarised below.

5.3.1 Place-focused cross-sectoral working

This requires a transition from sectoral identification to networks based on location, proximity and identity. The working definition of the cultural destination highlights the importance of the cultural tourism supply chain to the cultural destination. This points the way towards the kinds of collaborative relationships in which location and proximity, rather than sectoral identification, play the crucial role. The six Culture Kent Pilot Projects focused on cross-sectoral working centred on place, and key findings from the Round Table Discussion (*see separate 'Best Practice for Building Cultural Destinations' pdf*) highlighted how strong networks have been found to deliver multiple benefits. For example, when these networks were built around a strong sense of place, it was found to allow cultural tourism stakeholders in a locality to develop a shared vision and speak with a shared voice. Thus, whilst considerable progress has been made through these Pilot Projects in Kent, more work can be done to build on the legacy of Culture Kent, taking best practice forward. With particular relevance to place-focused collaboration, this could be achieved via the creation of a **shared goal/vision:**

- **Mapping networks and understanding identity** – Building upon initial baseline data developed by Culture Kent, the research programme developed a comprehensive audit/data base of cultural organisations within Kent. The next step will be to map this and explore specific regions/cultural destinations within Kent, and identify their distinct DNA, within the context of their cultural tourism offer. This will:
    - allow key facilitating bodies operating at a regional and sub-regional level to identify experience clusters linked to the specific DNA of locations, and for this to be embedded in destination marketing and destination management plans/strategies;
    - create a better sense of place and authentic experience for the visitor in line with consumer trends; and

- provide the basis for more meaningful alliances/networks linked to place/location rather than sectoral affiliation. Stakeholder participation within this process will help to generate ownership amongst networks of organisations, and a common sense of purpose.

- **Identity** – Whilst there is a need for a coherent sense of identity, the interview analysis identified a sense that there is also a need for regional marketing to embrace the *diversity* of Kent's offer and the variety of lenses through which the county can be viewed and experienced. An understanding of the cultural tourism DNA of key destinations/regions will go a long way to achieving this.

5.3.2 Improving joined-up thinking and delivery

- **Focus on the visitor experience** – From the perspective of place, the interview data and Round Table Discussion Event highlighted the need to move from an identification with sector, to one focused on the visitor experience – to see the cultural tourism offer from the perspective of the visitor. This is supported by the Evidence Review, which highlights that cultural tourists do not make the same 'supply side' distinctions between destination attractions and cultural activities and the wider visitor economy as professionals do working in the field. As one interviewee states 'we need to see this from the visitor perspective – the visitor journey' (8-C/A).
- **Sharing information and programming** – The challenges of meaningful programming within a destination (local–regional) were raised by a number of interviewees, and described by one as 'creating seasons of things that relate' (6-MO). Programming and sharing of information is seen to be crucial to the development of an attractive cultural destination. The Culture Kent Pilots have demonstrated that it is possible to develop wider partnership working to support this and have had some considerable success in doing so. To build on the momentum gained from the Pilot Projects this style of network based collaboration could be further developed and rolled out across other destinations in Kent.

5.3.3 Understanding and addressing perceptions of difference

This is important where the perceptions of difference act as a barrier to cross-sectoral working. The interview based research revealed a widespread mind-set encountered 'on the ground' and particularly strong in mixed offer and cultural/arts organisations, of 'tourism' and 'culture/arts' as forming distinct sectors, characterised by differences in language and in perceptions of, and approaches to, markets/audiences. There is still a clear need to address these often deeply rooted perceptions of difference, through:

- **Advocacy** – Showcasing the work of the varied organisations who have been key stakeholders in the six Culture Kent Pilot Projects. Interviews with the Pilot Leads have shown how involvement with these pilots has been often transformative, raising awareness of the benefits of cross-sectoral working. For some organisations the Pilot Projects have significantly contributed to their realisation of the relevance of cultural tourism and visitors to cultural/arts organisations.
- **Blurring of community, local and visitor markets** – The perceptual division between community and tourist seems real. According to the online survey, cross-sectoral working is widely perceived as irrelevant amongst cultural/arts organisations who see arts/culture as being aimed at locals, rather than visitors. This artificial distinction between local/community audiences and visitors needs to be broken down within the context of a thriving cultural destination, where local audiences and community engagement can sustain cultural attractions year round. Raising awareness about the value of local markets – *exploring their own doorstep* – is key here. The significance of the VFR (visiting friends and relatives) market needs to be communicated to those working in cultural/arts organisations, where the terminology is perhaps not as well known.
- **Addressing tensions over *seemingly incompatible* missions** – Findings from the online survey and interviews with cultural/arts organisations highlight the importance of mission based on community, cohesion and inclusiveness. This can lead to concerns from an arts perspective that their artistic/authentic integrity could be threatened by the presentation of the art form to a more commercially and visitor oriented market. Showcasing the outcomes of Culture Kent Pilot Projects *(see Culture Kent Pilot Project*

Case Studies) and further round table discussion events focusing on disseminating best practice could help to break down these barriers.

5.3.4 Understanding the different levels and types of cross-sectoral working

When organisations were viewed in terms of their level of cross-sectoral working, classified as ranging from *none* to *limited, developing*, or *established*, various types of engagement were uncovered. This report has highlighted that the types of cross-sectoral working (*goal-oriented, network-based* or *resource-based*) adopted by organisations are a product of a range of internal and external factors. There is *no one size fits all* solution, and collaborative preferences will change over time for different organisations. Reliance on goal-oriented short-term, one-off collaborative projects is, however, fragile. Cultural destinations will develop more resilience over time if more network and resource based collaborations are successful. The five-fold typology of organisational relationship with place, expressed in terms of Business, Stewardship, Regeneration, Community and Creative Community – developed through this research – shows how important place embeddedness is to the evolution of sustainable and resilient cultural destinations.

Image courtesy of Canterbury Culture

For more detailed findings and evaluation developed from this area of the Culture Kent Research Programme – please view the full report: Culture Kent Research Report 2: Organisational Perspectives on Collaboration/Partnerships and Cross-Sectoral Working.

6 CONSUMER PERSPECTIVES

This section provides a summary of the Consumer perspectives research.

Objective: To develop an understanding of the motivations, perceptions, demographics and experiences of current and potential cultural tourist markets to Kent.

A full account of the methods, findings and evaluation of this aspect of the Culture Kent Research Programme can be found in Report 3 (Consumer Perspectives)

6.1 CONTEXT

Building on the cultural audit and aiming to inform the broader goals of Culture Kent, the consumer survey focused on gathering the views of domestic consumers. The survey explored the motivations, perceptions and demographics of both existing and potential cultural tourists to Kent. When exploring the results, findings from previous Visit Kent and VisitEngland reports were looked at, to enrich the context of the findings.

The data was gathered using an independent online panel to reduce bias in the sample, accessing respondents that Visit Kent/Culture Kent had not necessarily been in touch with previously. This generated 770 responses. Through a filtering quota, the survey was completed by visitors from London and the Home Counties, and therefore the results reflect the counties selected. It looked to identify and examine the views of the following three groups – existing Kent cultural tourists, existing Kent leisure tourists, potential cultural tourists.[10]

In terms of the demographics of respondents, the highest proportion of *existing Kent cultural tourists* were aged 25-34 (36%), while for the *existing Kent tourists* the most dominant group were aged 65 and over (29%). This is consistent with a destination research study conducted by VisitEngland (2017), which shows Kent as a destination attracting a younger demographic than other GB regions. Those classed as *potential cultural tourists* were more evenly spread, although the most dominant age bracket was 25-34 (22%).

6.2 KEY LEARNINGS

Working the following assumptions into strategic planning will empower stakeholders to set more accurate goals, leading to better management and increased visitation:

- Past perception research and wider visitor studies have shown 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 holidaymakers.

[10] 'Cultural tourists' refers to tourists whose primary motivation is culture, whereas for 'leisure tourists' culture is not the primary motivation.

- Another factor worth taking into account is **the proximity bias among holidaymakers** 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.

6.2.1 Headline findings for Kent

The majority of *existing Kent cultural tourists* are younger than the other groups (36% were aged 25-34), which is consistent with the Kent Destination report published by VisitEngland in 2017, which shows Kent as a destination attracting a younger demographic than other GB regions. Furthermore, when looking at targeting additional cultural tourists, it is recommended that messaging should be tailored to appeal to a younger demographic.

A higher proportion of *existing Kent cultural tourists* tend to spend longer than a day in Kent compared with *existing Kent leisure* tourists, with 51% spending short breaks of up to three nights and 21% taking mid-length holidays of four to seven nights, compared with 43% and 14% respectively for *existing Kent leisure tourists*. This trend 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, allowing visitors to engage with the wider destination experience.

Spending more time at the destination consequently means that the economic value of the visits increases. This supports the need for actively engaging in promoting the cultural tourism offer more, further highlighting the scope for sustained cross-sectoral collaboration.

The cultural tourism offer in Kent is diverse and complex in the minds of tourists, with cultural activities going beyond the boundaries of venues, such as galleries and museums, into the 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, strengthening the findings of the organisational perspectives research and reinforcing the need for cross-sectoral partnership working. This also highlights the opportunity to expand the promotion of the cultural offer in Kent beyond cultural and arts venues to the wider destinations and natural environments.

In line with other research, 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 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.

The study confirmed the assumption that cultural tourists do not make a clear distinction between culture and heritage. For instance, looking at the *existing Kent cultural tourists*, most frequently cited activities included, 'visit a heritage venue' (36%), 'explore the countryside' (33%) and 'explore the coast' (29%). To reinforce the validity of this point about heritage, the raw data was re-run, filtered by cultural tourist types, which emerged from McKercher's matrix, illustrated on p. 37, below. The new analysis showed that heritage is an important aspect of the cultural offer for both *purposeful cultural tourists* (41%) and *sightseeing cultural tourists* (38%). This supports the need for sustained cross-sectoral partnership working to grow Kent's number of visitors.

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.

6.2.2 *Looking forward – aspects to take into account in order to attract more cultural tourists to Kent*

- A significant segment of the cultural tourists to Kent is made up of young visitors (25-34 years old).
- Their perceptions of Kent are related to the wider environment – Garden of England, Coast, Countryside, Hops – highlighting that despite their primary motivation being culturally led, they are motivated to experience culture and cultural activities whilst in an attractive rural or coastal setting. This illustrates the diverse and complex nature of the cultural tourism offer in the minds of tourists, as they seek a wide-ranging experience outside the walls of specific cultural venues.
- Cultural tourists do not make a clear distinction between culture and heritage.
- Looking at the visiting patterns of respondents, a larger proportion of cultural tourists is more likely to choose a break of more than one day in Kent, compared with the Kent tourists motivated primarily by leisure, thus leading to a potentially higher spend.

6.3 TOP LINE FINDINGS

Main motivations

- Motivations for choosing a destination for both *existing* and *potential* groups of cultural tourists centred on museums, followed by festivals for those who have been to Kent in the last three years, and by cinemas for those who have not visited Kent.
- In the case of *existing Kent leisure tourists*, the most popular choice influencing their decision to visit a place was visitor attractions, followed by walking and cycling.

Demographics

- *Existing Kent cultural tourists* were more frequently of a younger demographic, aged 25-34 years (36%), while the largest proportion of *existing Kent leisure tourists* was aged 65 and over (29%). The former is consistent with the Destination Research conducted by VisitEngland (2017), which highlighted that Kent is beginning to attract a younger audience, especially when compared to the national averages.
- *Potential cultural tourists* were more evenly spread across the age ranges, although the highest proportion fell in the 25-34 years age bracket (22%).
- The majority of both *existing* and *potential cultural tourists* originated from London, followed by Kent, within the limitations of the geographical areas sampled. However, with the exception of London, the highest number of *potential cultural tourists* were from Essex.

Influencers

- Top influencing factors for all respondents when selecting a destination were 'beautiful countryside' (60%), 'range of visitor attractions' and 'beautiful coastline' (both 47%). Whilst these factors were cited by each of the tourist groups, the order of importance given by each group differed slightly.
- 'Quality of food and drink' was rated fourth for *existing Kent leisure tourists*, whereas both *existing* and *potential* cultural groups ranked cultural aspects as the next most influential, displaying consistency with initial motivations.
- When comparing visitors and non-visitors it could be suggested that aspects including 'beautiful coastline', 'countryside', 'range of visitor attractions' are key motivators contributing to visitors' decision to visit Kent.

Sources of inspiration

- For all respondents the top three sources included 'friends and relatives' (50%), 'travel guide websites' (35%) and 'special offers and promotions' (34%).
- These findings were mirrored by *existing Kent cultural tourists* and *existing Kent leisure tourists. Potential cultural tourists*, in contrast, were still inspired by friends and relatives, but their responses also included 'travel review websites' and 'an article in a magazine or newspaper'.

Activities normally undertaken

- 'Museums' and 'visitor attractions' were shown to draw cultural tourists to the destination, although once within a destination, activities such as 'exploring the countryside' and 'eating in restaurants' are activities in which visitors often engage.
- The Kent cultural tourist does not make a distinction between culture and heritage.

Importance of the cultural offer

- The majority stated that the cultural offer was 'very important' (53%) with a further 7% of all respondents stating that the cultural offer was 'the main reason' when choosing a place to visit. Only a small percentage of all respondents stated that the cultural offer was 'unimportant'.
- The perception of the cultural offer in visitors' minds is complex and wide ranging.
- The majority of cultural tourists stated that the cultural offer was 'very important', showing consistency across both *existing* and *potential* groups' responses.
- Interestingly, responses given by *existing Kent leisure tourists* indicate that a higher percentage rate the cultural offer as 'very important', compared with *potential cultural tourists*.

Reasons for participating in cultural activities

- Among cultural tourists, there is a level of conscious motivation driven by the need to learn whilst on a trip, and not visit a place just for entertainment purposes.
- *Existing Kent leisure tourists* were more likely to be motivated by the sightseeing and entertainment aspects, however whilst at the destination, they are willing to participate in cultural activities in order to learn.

Cultural tourist classifications

- The most prevalent response among all respondents was that they 'sometimes' (39%) describe themselves as a cultural tourist, which was also mirrored across responses given by each tourist group.
- Only a small proportion of all respondents selected 'not at all', indicating that regardless of their initial motivation, the majority of tourists will identify themselves as a cultural tourist to some degree.
- Those consciously motivated by culture do not necessarily only seek cultural activities. Although culture plays an important role, they seek an overall experience within the destination.
- When looking at the sample in terms of the cultural tourist types outlined in the Evidence Review, the majority of respondents see culture as a key motivator, but the type of experience sought is more entertainment focused, followed by *purposeful cultural tourists* whose primary motivator for decision-making is driven by the need for a deep cultural experience.
- For *potential cultural tourists* and *existing cultural tourists*, who are markets that could potentially be targeted when it comes to exploring the cultural offer in Kent, culture plays some role within destination selection, despite the fact that they do not strongly perceive themselves as cultural tourists.
- A smaller percentage of the sample self-identified as *purposeful cultural tourists*, yet when respondents were asked more indirectly about depth of experience and importance to them of the cultural offer, their responses are in fact consistent with those of the *purposeful cultural tourist*.

Current Kent visitor trends and perceived barriers

- Current visitors across the sample were more likely to have visited Kent for a day trip or short break, compared to a longer holiday.
- A larger proportion of *existing Kent cultural tourists* went on short breaks (51%) and mid-length holidays (21%) in Kent than *existing Kent leisure tourists* (43% and 14% respectively). This trend may reflect an opportunity to promote a wide range of activities and places to visit, supporting the role of cultural tourism in sustaining destinations.
- For visitors whose primary motivation is culture, their propensity towards stays of more than a day in Kent may reflect the diverse and varied need as a cultural tourist to fully experience the destination.
- When looking at visitor figures in terms of volume and value, comparing figures from the *2016 Economic Impact Cambridge Model* (Visit Kent, 2016), the number of trips to Kent has increased by 2 million and the value of tourism has seen a 4.8% increase to £3.6 billion since the period 2013-2015. Although this study does not break down figures by purpose of visit in detail, it can be assumed that the overall increase will have resulted in a subsequent increase in the number of visits to cultural venues.

Reasons for not visiting

- Looking at the results from both this study and Visit Kent's 2012 *perceptions study*, it can be noted that the top two barriers remain unchanged, with visitors' lack of awareness of Kent as a destination and what it has to offer, continuing to be a major challenge.

Perceptions of Kent

- The most commonly used words were 'gardens', 'countryside', 'hops' and 'coast'.
- For *existing Kent cultural tourists,* words were most strongly associated with greenery and landscape, with the other two groups offering a more varied response covering 'gardens', 'coast' and 'countryside'.
- For non-visitors, frequently cited word included 'hops'. Furthermore, these results display the strong and positive image that Kent has in the minds of tourists, among both visitors and non-visitors.

What makes Kent unique, special or different?

- The most frequently selected aspects of Kent that make it unique, included 'it is the Garden of England' (43%), 'attractive countryside' (39%), followed by 'stunning coastline' (34%), with these aspects also being the most frequently selected ones among both *existing Kent leisure tourists* and *potential cultural tourists.* However, responses given by *existing Kent cultural tourists* differed slightly, and also included 'long and rich heritage'.
- 'Cultural events, the arts and festivals' rated most prominently among *existing Kent cultural tourists* (26%).

Associations with Kent

- Findings across the respondent categories indicate that the strongest association with Kent was 'the Garden of England' (73%).[11] This was followed by 'coastline' (69%) and 'quintessentially English' (68%).
- A significant number of all respondents rated words such as 'arty' and 'contemporary' fairly low, although 54% associated Kent with being 'cultural' – indicating that perhaps more 'traditional' (64%) aspects are often seen as part of the cultural offering. Furthermore, findings are comparable with those of the Visit Kent 2012 *perceptions study*, where both 'the Garden of England' and 'quintessentially English' rated the highest in terms of associations with Kent.
- *Potential cultural tourists* were found to have weaker associations with the 'Garden of England' than the other two groups.
- Looking at cultural attributes of the list only, the most positive associations with Kent were made by the *existing Kent cultural tourists,* with the strongest ones being 'cultural' (68%), 'exhibitions' (52%) and 'arty' (51%), among this group, consistent with their previously stated primary motivation surrounding the cultural offer.
- Regarding weaker associations, 38% of this group associated Kent with being 'contemporary' only 'a little', suggesting that Kent's association with 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. In addition, 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, eateries, etc.
- Those who have visited Kent were more likely to associate Kent with well-promoted USP's such as 'the Garden of England' compared to non-visitors.

Likelihood to recommend

- Both groups stated they 'would recommend' each aspect of Kent as a destination, ensuring a clear positive recommendation to friends and family. As the latter was previously identified as the main source of inspiration for destination selection, this highlights a positive trend for growing visitation though VFR recommendations.

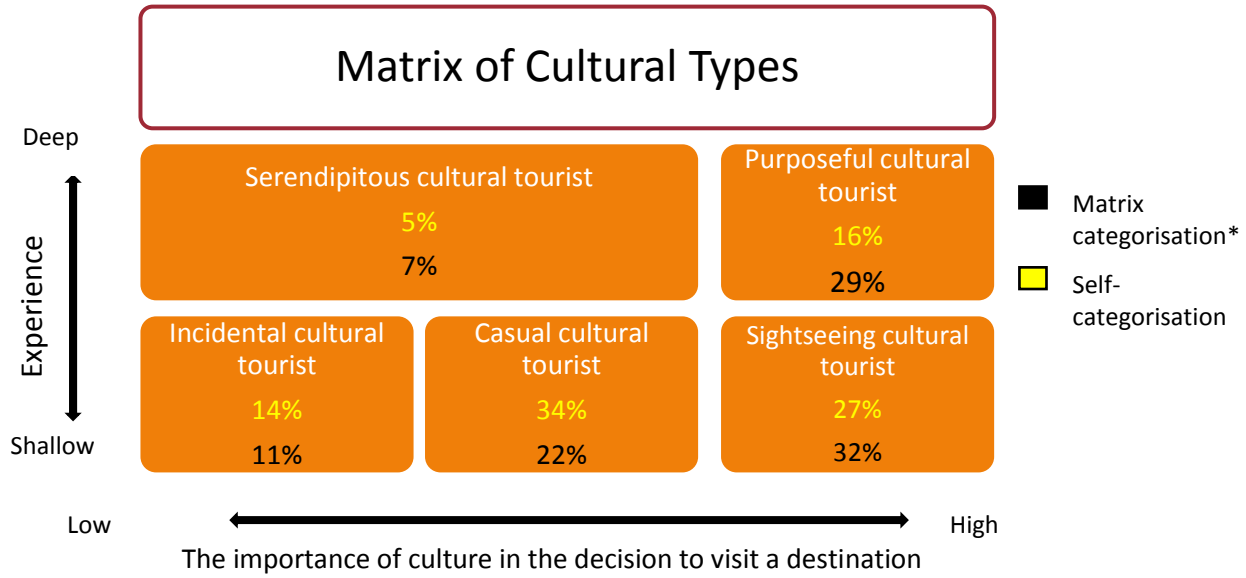
[11] The figures given combine the frequencies of the responses 'very much so' and 'quite a lot'.

- The highest percentage of activities people 'would neither recommend nor not recommend' was attributed to 'value for money' and 'a range of cultural activities'. This underlines the areas in which future marketing efforts should be made, to improve recommendations overall.

Matrix of Cultural tourist types

The data obtained was also analysed against the matrix of cultural tourist types that emerged in the Evidence Review (Figure 5). Based on the findings, purposeful cultural tourists, sightseeing cultural tourists and casual cultural tourists were identified as the three most prominent groups. The subsequent analysis examines the results related to these three cultural tourist types.

Figure 5: Matrix of Cultural Tourist Types



*Matrix of cultural tourist types, displaying percentage of respondent's self-categorisation and categorisation *based on depth of experience and importance of culture (Adapted from McKercher and du Cros, 2003).*

Purposeful Cultural Tourist- Culture is often the main reason I choose a place to visit, to learn something new.

Sightseeing Cultural Tourist- Culture is often a key reason I choose a destination/place to visit in order to be entertained.

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.

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.

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.

Age

- In the case *of purposeful cultural tourists*, the largest proportion of respondents were aged between 35-44 (23%). For *sightseeing cultural tourists* results displayed a younger demographic, aged between 25-34 (33%). Lastly, for *casual cultural tourists* the largest proportion of respondents were found in the older demographic, 65+ (23%).

Visitors vs. non-visitors

- When looking at the percentage of each of the three main cultural tourist types, by those who were visitors and non-visitors, findings show that the majority had in fact visited Kent in the last three years. This was particularly high in the case of *sightseeing cultural tourists* (73%), meaning that a more sustained effort to attract this audience should be made. For them culture is a key motivator, but the type of experience they seek is more entertainment focused – again highlighting the importance of cross-sectoral collaborations.

Sources of inspiration in destination selection

- For each of the three cultural tourist types, the most frequently cited source of inspiration concerning destination choice was 'friends and relatives'.
- However, for *purposeful cultural tourists* 'travel guide websites' was the second most popular source of inspiration.
- For both *sightseeing and casual cultural tourists*, 'special offers or promotions on offer' were the next most popular source of inspiration.
- These findings can be utilised to develop targeted experiences and effective marketing communications.

Activities normally undertaken

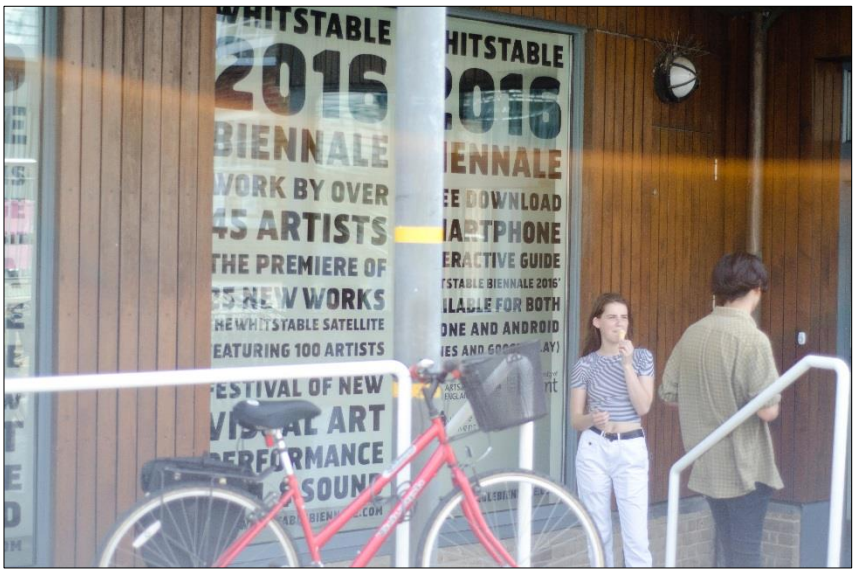
- When looking at what activities respondents normally undertake as part of their trip, *purposeful cultural tourists* were found to place strong importance on 'heritage venues' (41%), closely followed by 'visiting a museum' (40%). More *sightseeing cultural tourists,* reported engaging in 'heritage' activities (38%), followed by 'to explore the coast' (35%).
- These findings show that heritage is still an important aspect of the cultural offer, as identified previously in the report. In addition, as this question not Kent-specific, it suggests that the heritage offer is important to culturally motivated tourists irrespective of destination.

Associations with Kent as a place to visit

- When looking at the combination of aspects associated with Kent 'quite a lot' and 'very much so', across the *purposeful, sightseeing* and *casual tourist* types, 'the Garden of England' was found to have the strongest association, particularly in the case of *purposeful* and *sightseeing cultural tourists* (both 80%).
- 'Coast' and 'quintessentially English' were also strong associations for both *purposeful and sightseeing cultural tourists*, with 75% of *purposeful cultural tourists* associating Kent with 'coast' and 74% as 'quintessentially English'.
- This was also mirrored in responses given by *sightseeing cultural tourists*, with 75% associating Kent with 'coast' and 'quintessentially English', either 'quite a lot' or 'very much so'.
- However, in the case of *casual cultural tourists*, associations with the previous aspects were not as strong, with 57% associating Kent with 'coast' and 62% 'quintessentially English'.

- *Purposeful cultural tourists* displayed the strongest association with Kent being 'cultural' (70%). This supports their firm interest in culture and cements Kent's strong cultural offering, among this cultural type.
- *Sightseeing cultural tourists* also displayed a strong association with Kent being 'cultural' (66%), although this was not as strong as the former group.
- However, *casual cultural tourists* had a lower association with 'cultural', at only 33%. This finding is representative of their cultural profile, being less focused on cultural activities themselves, but considering that these add to the overall experience of a destination.
- Lastly, it was found that, with the exception of *sightseeing cultural tourists,* all matrix types, and in particular *casual cultural tourists* (18%), had a lower association with Kent being 'contemporary'. However, all groups had a strong association with 'traditional'. This perhaps reinforces the idea of more traditional aspects such as heritage being a major element of Kent's cultural offering in the eyes of the visitors.

For more detailed findings and evaluation developed from this area of the Culture Kent Research Programme – please view the full report: Culture Kent Research Report 3: Consumer Perspectives.



Whitstable Biennale 2016, courtesy of Whitstable Biennale

7 FINAL SUMMARY- THE CULTURE KENT RESEARCH PROGRAMME

This report has sought to bring together the three key strands of research, developed as part of the Culture Kent Research Programme. To bring this report to a close, this last section will focus on summarising the core areas that have provided the basis of the research programme, as it has sought to deliver:

- the research and intelligence required by Culture Kent, to help it achieve its key aims; and
- a body of research to inform future work on developing cultural tourism in Kent.

The potential for cultural tourism in Kent:
The analysis of the contemporary cultural tourism landscape has revealed important opportunities for further developing cultural tourism in Kent. These opportunities need to be considered in light of the national/regional policy context, wider trends, and the nature of the tourism and culture/arts 'sectors' and organisations, and their interrelationships. The research programme has explored cultural tourism within this wider context, identifying a number of factors that are contributing to the growth in market opportunities, such as:

- *The broader policy/strategic landscape in Kent* – where bodies such as the Kent Cultural Transformation Board and the South East Creative Economy Network have identified cultural tourism as a priority area.
- *The interrelated nature of the cultural and visitor economies* – organisations were found to be positioned across a 'sectoral continuum' between tourism and culture/the arts, sharing a number of interests, particularly with regard to the growing of audiences and creating a sense of place. The potential for this continues to be recognised, for example by the new *Cultural Destinations Programme* for 2017-2020[12] and *The Great Place Scheme*[13] – with the successful outcome of the 'Pioneering Places: East Kent project'.[14] Thus, arts and cultural organisations have the capacity to play a key role in place-making and in the generation of innovative new experiential products for tourism, whilst tourism can contribute to the growing of audiences and markets for arts and cultural organisations.
- *The transition of tourism from a 'service industry' to an 'experience economy' and the shift in cultural tourism from 'seeing' to 'experiencing'* – the interaction between cultural tourism providers and consumers in the 'co-creation' of experience (Jovicic, 2016:605) is identified as an important element in differentiating destinations (Cetin and Bilgihan, 2016).
- *The complementarity of community, local and visitor markets, providing potential for inbound and domestic visitor markets* – Kent's proximity to London, and its varied cultural tourism assets, offer opportunities to capitalise on the inbound tourist market. On the other hand, the UK domestic market has the potential to make positive connections with a localised cultural tourism offer, further strengthened by the rising significance of the VFR (Visiting Friends and Relatives) market and local community audiences.

Understanding the cultural tourism offer
This needs to be seen within the context of the product, destination and experience. At the heart of Culture Kent was the concept of the cultural destination, defined by this research as *'a networked space delivering a total experience to visitors that helps them understand a location and its people, through history and contemporary culture.'* This supports the view that cultural tourists do not make the same 'supply' side distinctions between destination attractions and cultural activities and, indeed, between culture/arts and tourism sectors, that professionals working in the field do. What is important is the '*total experience'* that can

[12] (http://www.artscouncil.org.uk/cultural-destinations#section-2)
[13] *The Great Place scheme*, devised by the Heritage Lottery Fund, Arts Council England and Historic England, to 'enable cultural and heritage organisations to make a step-change in how they work together, and with other organisations in other sectors, in order that arts, culture and heritage contribute more to meeting local social and economic objectives' (https://www.greatplacescheme.org.uk).
[14] Led by the Creative Foundation under the Great Place Scheme (https://www.greatplacescheme.org.uk).

be delivered by a destination. *This requires place-focused cross-sectoral working, necessitating a transition from sectoral identification to networks based on location, proximity and identity*.

Understanding the cultural tourist

The profiling of cultural tourists has moved on from the generalized stereotype of the older, higher income professional, to a more nuanced understanding of a cultural tourism continuum. Cultural tourists cannot be represented as one single market; attention needs to be paid to the varying degrees to which culture is core or peripheral in terms of their motivation and the depth of experience sought. The application of the 'Matrix of Cultural Tourist Types' in the consumer research considers this. The consumer survey identified three prominent groups, only one of which – *the purposeful cultural tourist* – seeks a deep cultural experience, with the other two – the *sightseeing cultural tourist* and the *casual cultural tourist* – engaging with cultural activities and seeking experiences that are more entertainment-focused. Whilst the consumer research provides more detailed consideration of existing and potential cultural tourists for Kent, what is important here is that a full understanding of the range of cultural tourism consumers is vital to effective targeting and positioning of the cultural tourism offer. The organisational research identified the need for regional marketing to embrace the diversity of Kent's offer and the variety of lenses through which the county can be viewed and experienced. As section 5.3.1 suggests, understanding the DNA of key cultural destinations/areas in Kent will help to achieve this, and, in line with the consumer research, help to promote a variety of cultural experiences to attract the range of cultural tourists identified with more bespoke products and a more enhanced visitor offer.

Understanding cross-sectoral working

Partnerships and cross-sectoral working have been central to Culture Kent and the wider ambitions of the *Cultural Destinations Programme*. In seeking to understand the levels and types of cross-sectoral working, organisational structure, governance, and the wider environment within which the organisations operate, were found to be key factors. The research confirmed a strong level of engagement with partnership working in tourism and cultural/arts organisations in Kent. Furthermore, it supported the contention that we are reaching a level of maturity where positive and negative influences (drivers) are converging to encourage the need for more cross-sectoral working. However, the awareness of the potential benefits of collaborative working is not widespread amongst organisations in Kent. This provides further justification for the research into the barriers to cross-sectoral working, the most notable being identified as resources (budget, staff and time), perceptions of difference, lack of joined-up thinking and the challenges presented by the different modes of partnership working. This part of the research put individual organisational perspectives at its heart, and the varied methods used to explore their perceptions of the opportunities and barriers to cross-sectoral working have provided a valuable 'voice' from which to explore the realities of such collaborative working.

Moving forward - the creation of fully networked and meaningful cultural destinations in Kent

The research has highlighted how a cultural destination needs to be meaningful from both a visitor and an organisational/institutional perspective. Furthermore, when this is applied to Kent, it requires the development of multiple cultural destinations that are meaningful at a regional and sub-regional/destination level. The preconditions identified by the research to achieving this (section 5.2.6) should be regarded as a set of principles that can provide the basis for understanding how Kent can move forward in terms of cross-sectoral working and using cultural tourism as one part of the strategic framework for developing sustainable and resilient cultural destinations.

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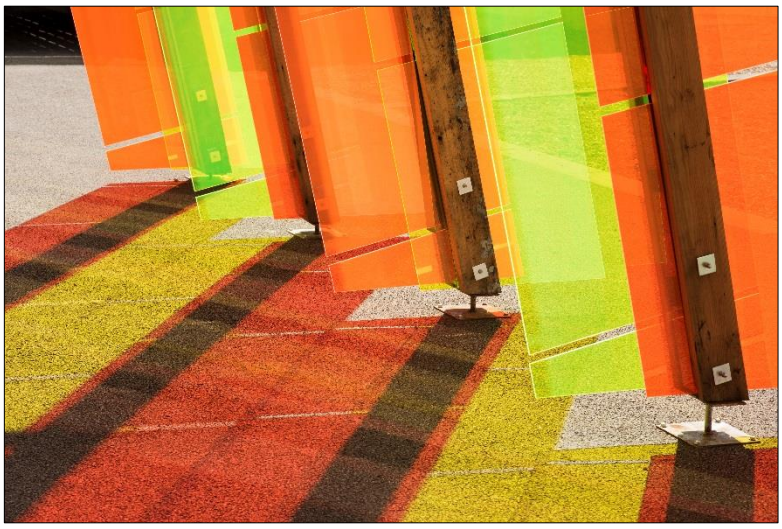
Harbour Arm Artworks, Folkestone. Image courtesy of Creative Foundation



Dutch/Light by Jyll Bradley (photo Thierry Bal), courtesy 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.

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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.

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