

EVALUATION OF ECONOMIC, ENVIRONMENT & SOCIAL IMPACTS OF THE INTERREG EXPERIENCE PROJECT IN KENT

PART 1 - INTRODUCTION, THEORY OF CHANGE &
DELIVERING ACTOR ENGAGEMENT & TRAINING TO MEET DEMAND
(WPT1)

KENT PILOT REGION REPORT 2023 (T5.1.3)



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INTRODUCTION

The Kent Regional Evaluation presents findings to assess the economic, environmental, and social impact on performance and sustainability of the Interreg EXPERIENCE project.

EXPERIENCE is a €24.5m Interreg France (Channel) England project, which cofinanced by €17m from the European Regional Development Fund. It is led by Norfolk County Council (NCC) and has run from September 2019 to June 2023.

EXPERIENCE is a major project to boost visitor economy of the Channel region in the off peak season through an innovative tourism strategy focused on new autumn and winter experiences to attract 11,309,368 new visitors across 6 pilot regions in England and France: Norfolk, Kent, Cornwall, Pas-de-Calais, Compiègne and Brittany (Baie de Morlaix and Côtes d'Armor).

Traditionally, the France Channel England region has predominantly used a destination-based tourism approach based on conventional, mass-market locations during peak season. However, travel trends are changing, changes that have only been accelerated following the COVID-19 pandemic with indications that:

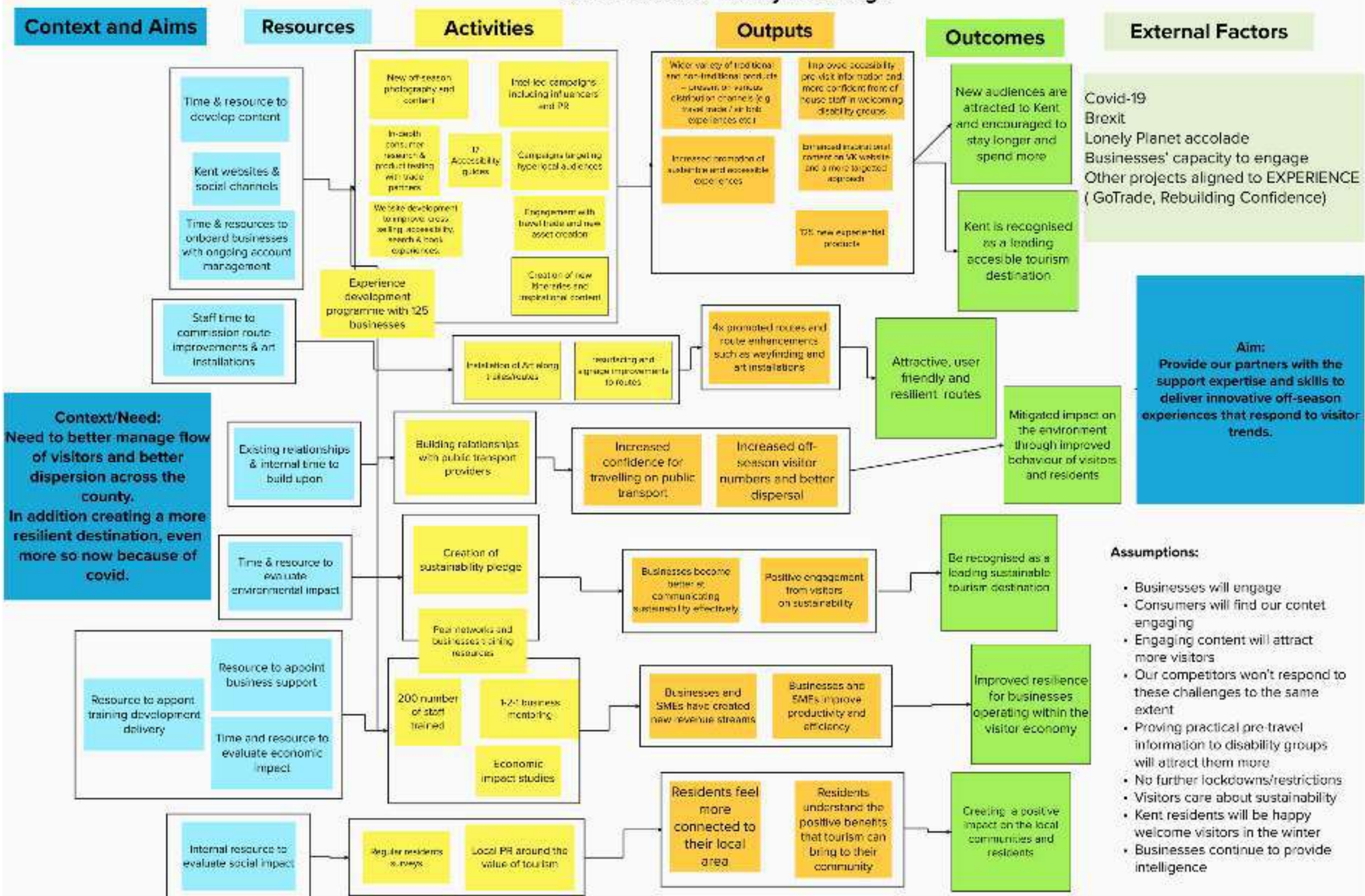
- Modern travellers are losing interest in traditional types of holiday;
- Experiential tourism is a growing travel trend based on regional uniqueness (source -Treksoft 2017);
- Travellers seek off the beaten path, "live like a local" authentic experiences throughout the year (source - skift 2018);
- 69% of global travellers (all ages) tried something new in 2016 (source -Trip Barometer);
- Regions inside and outside the EU have shifted from destination based approaches to successfully harness this new experiential trend.

These emerging trends in demand have been the inspiration for EXPERIENCE project to create and switch our 6 pilot regions to a new approach and tourism strategy. The Kent Regional Evaluation Report serves as one of 6 EXPERIENCE regional reports, assessing the economic, environmental, and social impact of the project that will inform the development of the EXPERIENCE Best Practice Guide. This legacy document will allow other users to learn from the successes and mistakes in our approach to implement best practice in their own organisations, regions, or countries.



KENT THEORY OF CHANGE

Kent Pilot Area Theory of Change



Experience aims to extend the tourism season (October to march), attracting 11,309,368 new visitors to the FCE region, by the end of the project in 2023. Kent will contribute to this target by working with traditional and non-traditional tourism actors on experience development programmes, improving infrastructure, improving inclusive access to regional natural and cultural assets supported by intel-led marketing and distribution. The Theory of Change provides an innovation pathway and outlines how Kent County Council and Visit Kent will utilise resources, and work with local actors and stakeholders to deliver innovative off-season experiences that respond to visitor trends whilst supporting local residents and businesses.

DELIVERING ACTOR ENGAGEMENT & TRAINING TO MEET DEMAND (WPT1)

WPT1 OUTPUTS

Kent's approach to engaging non-traditional tourism actor as a route to increasing capacity and confidence to meet the new experiential demand was based upon the following activities.

WPT1 ACTIVITIES SUMMARY

- Regional network engagement events - 42
- Pilot Study Regional Network Engagement events - 33
- Kent wide Skills audit & training needs analysis - 1
- Targeted bespoke training materials & services - 28
- Training delivered to SME's - 208

Collaboration workshops with all EXPERIENCE PPs (T1.1.1)

Visit Kent presented the results of its Business Skills Audit (T1.3.1) carried out in 09/20 to the WP2 collaboration workshop on 19.01.21 that was hosted by PP4 and PP6. The presentation focused on the SME preferences in the Kent Pilot Area to the themes and desirable format for experiential tourism training. Respondents identified 10 themes for training and 67% favoured instructor led 1-2-1 training or coaching.

Local/regional active engagement events with pilot study actors (T1.2.1)

Visit Kent organised quarterly network events attended by Kent tourism businesses and stakeholders. Attendees were updated with the progress of EXPERIENCE delivery along with wider tourism trends and highlights across the Kent Pilot region.

- 42 x Kent networking events for tourism and non tourism SMEs (2020, 21, 22 & 23)



- It is important to keep wider project stakeholders engaged in project progress, this inspires some to support and others to take part

EXPERIENCE Challenge 1 (C1): ' FCE region currently focuses on traditional, destination-based, pre-packaged tourism. Modern travellers are losing interest in this approach.'

EXPERIENCE Challenge 2 (C2): ' FCE region currently focuses on traditional, destination-based, pre-packaged tourism. Modern travellers are losing interest in this approach.'

Pilot study regional networks (T1.2.2)

Visit Kent originally delivered 8 thematic Experience Development workshops designed to inspire businesses to create new experiences in a range of themes, from Arts crafts & media and Unexpected Experiences

Visit Kent also ran a series of Peer Network events, supported by Smarter Societies.. These Peer Networks were businesses led events with expert speakers talking on subjects proposed by the businesses themselves. Take up of online sessions were very popular, however physical sessions tended to have reduced attendance. Newsletters were used pre and post event to continue to boost interest in the topic of the trainings in order to maintain the level of interest of the SMEs in the project activities.




- Our peer network sessions were very popular and were one of the key highlights for our businesses, enabling them to engage and in some cases collaborate with other like minded businesses to develop new innovative and sustainable experiences
- A peer network approach enables businesses to share their pain, ideas and best practice without being 'preached' to from 'industry experts'

WPT1 OUTPUTS CONTINUED

Skills audit and training needs analysis (T1.3.1)

Visit Kent and Kent Downs jointly delivered a Kent Pilot Region Businesses needs, skills audit and training needs analysis report. This report presented the findings from a recent survey, which aimed to capture the needs of visitor economy businesses in Kent. The survey focused on identifying training and skills development businesses now need to inform and adapt their product offering. This enabled the development of the Kent programme of training and training materials delivered through T1.3.2 and T1.3.3.


One such findings shows respondents identified 10 themes for training and 67% favoured instructor led 1-2-1 training or coaching.

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- **Online and expertise-led formats** - online and instructor-led or coaching sessions, emerged as the most popular format overall (71%), followed by group discussion and activities (65%) and instructor-led training (59%).
 - **Delivery level** - SMEs favoured training at a basic or intermediate level with the exception of learning experiential marketing techniques.
 - **Group discussions and peer-to-peer sessions**- SMEs favoured training on co-producing marketing messages with DMO's, group discussions and peer to peer activity in sub regional clusters.
 - **Virtual content case studies** - case studies could be used allowing businesses to immerse themselves in exemplar best practice case studies.
 - **Training in sustainable practices** - in demand with consumers including trends around food miles, experiencing local produce and sustainable forms of transport.

Targeted bespoke training materials and services (T1.3.2)

Training materials were developed with the business needs audit in mind, influencing our decision to make training materials to be largely accessible online to be used independently without the constraints such as travel and additional time of formal training sessions. Resources were also developed to allow organisations to run group training sessions, providing resources for the trainer.

Training took a variety of formats including film, webinars, toolkits, resource packs, guides and presentation. A variety of audiences were targeted including businesses, walkers, cyclists, horse riders, urban, rural and minority ethnic communities.

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- Training materials can quickly become outdated, to ensure longevity it is important not to include references to timely content, but to rather link out to an updatable online resource
 - Businesses are keen to learn but are hesitant to invest their time in training when they feel they must be focused on delivery of their business day to day, resources must be developed to account for this


Training delivery (T1.3.3)

Kent delivered 206 training events. To reach a wide target audience a variety of innovative and traditional formats were used including network walks, online, in-person, webinars, workshops and peer networking.

Of the 123 tourism and non tourism SMEs that completed the 5 stages of the Experience Development Programme, 57% reported that their participation had led to them gaining a more focused product idea, 33% had gain a clearer timeline, 38% had adapted their business plan, 65% had gained a better understanding of their target markets, 25% had refined their financials/pricing models, 27% had identified new distribution channels for their products. Overall, 95% of the 123 participating SMEs confirmed that their participation in the mentoring programme had helped grow, improve or diversify their businesses.

There were two tranches of the Experience Maker training (April/May 2021 and December 2021). Each tranche consisted of an Introduction to Experience Making, two workshops and follow up 1-2-1 sessions. Unmissable England were commissioned to deliver the programme and provide expert training and is benefited 54 participants.

A sense of place workshop explained how Experience Makers, local SMEs, farmers and landowners could expand and diversify to meet the needs of visitors while protecting the Kent Downs AONB and the landscapes of the North Downs Way. There were three themes: Agritourism; Sustainable Tourism in Protected Landscapes; Local distinctiveness and Storytelling.

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- It is important to consider the wider training needs of a businesses outside of tourism trends. To support businesses in creating new experiences, support in topics such as business plans and planning permission was also useful
 - Difference businesses have different availability for training, for some mornings are good, other weekday evenings. If you are running physical sessions, then your audience availability needs to be highly considered

Resources Hub (T1.3.4)

The Kent Pilot Region supplied 28 training resources to the lead partner to upload to the EXPERIENCE resource hub, this included resources in both French and English

WPT1 CASE STUDY

PEER NETWORKING BENEFITS (T1.2.2); GEOFF BAXTER, SMARTER SOCIETY

What we do:

My name is Geoff Baxter and my company Smarter Society, is one of the leading providers of business support and training. I work with local authorities and other organisations to deliver programmes that make a difference. In 2020, Visit Kent procured us to run the Visit Kent Experience Development Programme to seize the opportunity that COVID-19 gave us all to work together and redefine the potential of Kent SMEs and adapt to the rapidly changing trends in demand for amazing tourism experiences. We set up the programme to build a portfolio of high-quality services and experiences that could market Kent as a destination for all seasons, building visitor numbers in the off-season months. In 2021, this rapidly transitioned into a Peer Eco-system approach in the Kent Pilot Area where participating Experience Development Programme SMEs started meeting up to discuss business issues in regional groups. Peer networking has increased in popularity in the last 3-5 years as the group works together and competes against each other to deliver more successful individual outcomes than would otherwise be the case when not operating in a supportive peer network. I was delighted to see the participating businesses making changes during the pause that the pandemic created to improve their overall business performance.

How we do it:

Building upon existing intelligence, we set up the Peer Ecosystems on a sub-regional level in Kent in the North, East and West of the pilot area. Our sessions started off with a presentation from a specialist speaker which were followed by break outs into smaller discussion groups, to discuss the issue and share experiences. The process really embraced group learning, shared paths for clear action, was accountable and created new relationships. I am true believer that Peer Eco-Systems promote 'Action Learning' which is 'an approach to problem solving and learning in groups that brought about change in individuals and their businesses who participated.

Impact:

125 businesses in Kent have benefited from the process in the Kent Pilot Area. They have co-created new ideas and have confirmed new experiential products amongst peers and in some case creating new itineraries linking complimentary experiences in the area that have been launched as a direct result of the Peer Networking.

Our Tips:

- Learn how other businesses are addressing challenges faced in developing new Experiences for visitors;
- Build new relationships with other local businesses to work together to create revenue opportunities;
- Critical to learn from industry best practices and seek further support from an ecosystem which you and your business have become part of;
- Embrace co-creation and creative thinking about future partnering ideas with other businesses;
- Find out rapidly what works and what doesn't!
- Identify collectively how to provide your visitors with a variety of interesting or exciting experiences that leave them eager to return for more.



SMARTER SOCIETY 

[HTTPS://WWW.TOURISMEXPERIENCE.ORG/](https://www.tourismexperience.org/)



EVALUATION OF ECONOMIC, ENVIRONMENT & SOCIAL IMPACTS OF THE INTERREG EXPERIENCE PROJECT IN KENT

PART 2 - DELIVERING EXPERIENTIAL TOURISM OFFER USING
UNIQUE NATURAL & CULTURAL ASSETS
(WPT2)

KENT PILOT REGION REPORT 2023 (T5.1.3)



KENT
GARDEN of ENGLAND

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Interreg 
France (Channel
Manche) England
EXPERIENCE
As part of the Channel Tunnel



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DELIVERING EXPERIENTIAL TOURISM OFFER USING UNIQUE NATURAL & CULTURAL ASSETS (WPT2)

EXPERIENCE Challenge 3 (C3): 'There is no tourism offer October-March to attract visitors (attractions are closed, no AirBnB Experiences in pilot regions).'

The tactical approach to C3 was to analyse the existing offer alongside potential opportunities and gaps, and use this information to inform Experience development programmes, working alongside and supporting traditional and non-traditional tourism actors in the Kent Pilot Region. Businesses were supported to ensure new activities were attractive to targeted markets, sustainable and financially viable to ensure long-term success.

WPT2 ACTIVITIES SUMMARY

- Off-season tourism options analysis reports - 9
- Experiences created or adapted - 463
- Supporting events - 3
- Itineraries created - 155
- Exciting interpretation - 2
- Closing last mile gaps - 21

WPT2 OUTPUTS

Off-season tourism options analysis (T2.2.1)

Visit Kent and Kent Downs commissioned a joint Experience Options analysis, completed in October 2020. The purpose of the report was to highlight experiential opportunities to capitalise on the natural and cultural assets that are currently underdeveloped, the gaps that if filled would strengthen the offer of the county, as well as the existing strengths in product.

The report built on the work we have done to develop the Visitor First strategy, which identifies three unique regions within the county, we would like to understand how the product offer within these regions of Kent can better showcase the unique identity of each place.

Countywide data was captured and presented in various ways. First of all, a county-wide report, broken down by the three clusters identified in our Visitor First strategy – North, East and West Kent. These opportunities, gaps and strengths were also mapped according to when the experiences are best delivered and whether they have the potential to be bookable, as well as an indication of the most suitable markets.

In addition, we also required individual factsheets for the following districts: Ashford, Canterbury, Dover, Folkestone and Hythe, Gravesham, Medway, Thanet and Tunbridge Wells. These were help to inform local strategies but also support business engagement. Each participating district had already highlighted a particular theme of product development that they wanted to prioritise, so consideration was given to this, however other opportunities were also explored.

- Food and drink - Ashford
- Eco-tourism - Canterbury
- Landscape and nature - Dover
- Events and festivals - Folkestone and Hythe
- Markets and multi-culturalism - Gravesham
- Culture - Medway
- Wellbeing - Tunbridge Wells
- Music, culture and film - Thanet

Each district of Kent was presented with:

- An analysis of the districts current core strengths
- An analysis of product opportunities with suggestions of new products to bring to market
- An analysis of opportunities & gaps, highlighting themes that the district may be strong in but is not taking advantage of.



- District specific analysis helped identify a range of offers across the county for different target markets
- The reports were useful when working with businesses to support the creation of new experiences

WPT2 OUTPUTS CONT...

Develop new off-season tourism activities (T2.2.2)

Visit Kent and Kent Downs have collectively supported businesses within the Kent Pilot Region with 463 new individual off-season tourism activities focused on Kent's cultural and natural assets, such as seasonal walks, stargazing and forest bathing. A selection of these activities can be found hosted on the Visit Kent and Kent Downs websites (WPT4).

Visit Kent identified and contacted 384 businesses about taking part in the experience development programme. The programme was also promoted on digital channels, newsletters, through partners and at third-party events. 149 applications were received from a variety of businesses both traditional and non-traditional tourism actors.

Businesses were then put on contact with Smarter Society to deliver a programme of 1-2-1 coaching with SMEs - business mentoring on a 1:1 basis.

Businesses recruited to the Experience Development Programme also benefited from a range of perks:

1. **1 to 1 consultation:** Specialist consultancy to support the development of a business plan for the launch of your new product
2. **Product testing:** Market testing of your concept with consumers and travel trade, and feedback to further develop your product (T4.2.1/T4.2.2)
3. **Content Development:** New photography for your product and inclusion in inspirational content (T2.2.4/T4.3.1)
4. **Consumer marketing:** Inclusion in targeted off-season consumer campaigns to market your product (T4.3.1)
5. **B2B distribution:** Distribution of your product to the travel trade through our established B2B connections and networks (T4.3.3)

Kent Downs ran a similar Experience Maker Programme focused on landscape based experiences/activities along with creating 43 upgraded walking routes with new mapping and photography.



- An attractive offer for businesses ensured they stayed engaged through to the end
- 1 to 1 mentoring provided businesses with tailored advice from, creating a business plan, to support with planning permission
- Creating new offers is not always a businesses priority and it takes a lot of resource to keep them engaged
- Businesses had an account manager to built relationships and tailor advice and support

Supporting events (T2.2.3)

Kent delivered 3 supporting events to showcase a range of innovative products developed throughout the project. The Open Golf - St Pancras Station 2020. The Pilgrims festival in September 2022 featured 62 activities and the Darent Valley Winter Fair showcased how to run an off season event that celebrated Kent's nature and heritage offering.

The 149th Open took place at Royal St George's Golf Club, Sandwich from 11 - 18 July 2021. Despite the Covid 19 pandemic, the final spectator numbers reached around 200,000 spectators across the week-long event. Many of the spectators will started their journeys from London, travelling to and from the championship on the same day. The INTERREG EXPERIENCE stand welcomed golf spectators to the county and through the stand and its promotions aimed to inspire them to return to the county for their own golf break or family experience. Spectators were encouraged to enter a competition to win a golf break in Kent. The stand Experience Kent showcased the unique and immersive experiences that were emerging in Kent with the key attractions being food & drink, wellbeing, landscapes as well as cultural and creative experiences.

The Darent Valley Landscape Partnership Winter Fair, with food and hot drinks, art, walk and talks, live music and more! Visitors were invited to wrap-up warm and come and explore the woodland and attend the Winter Fair at Andrews Woods, Shoreham, hosted by the Darent Valley Landscape Partnership. The Fair served up delicious food and hot drinks, allowed visitors to try out woodland crafts and art activities, join walks, listen to live music and experience a walkabout theatre with an innovative immersive sound experience.

The Kent Pilgrims' Festival ran from September 21st to 25th 2022 and was the third formally organised festival to be held in the county, following on from the Canterbury Pilgrims Festival in 2019. The aim is for the event to become bi-annual with the coordination potentially taken on by the Confraternity of Pilgrims to Rome and the funding of stakeholder local authorities. The objective was to make the festival accessible to a wide audience in terms of activity variety and to offer diverse interpretations of pilgrimage. The festival will showcase Kent as an international pilgrimage destination within the Kent Downs AONB, reaching out to audiences of all or no faith.



- Engaging local communities is key to creating a lasting impact
- Tapping into local, regional or national events provides access to a wide audience to increase reach and engage new audiences

Package and curate activities into themed itineraries (T2.2.4)

Kent developed 147 itineraries. A variety of itineraries were developed ranging from 1 to 5 days and available on the Visit Kent and Kent Downs websites.

Visitors to the Kent Downs website are able to custom make their own itineraries using the Itinerary Builder function. Working with accessibility experts Kent Downs reviewed the definitions of accessibility to include a wide range of disabilities including sensory, visual, physical and mental. This meant we have reviewed our whole approach to accessibility. Experts have advised that it is not for the provider to define what is accessible and what is not as the range of disabilities are so broad and what is accessible for one person is not accessible to another. Instead the expert advice is to provide a full range of information and digital transparency so that the user can decide for themselves if this is accessible. With this expert advice we have implemented a range of measures to ensure that all our itineraries are as accessible as possible information provided so the user can decide for themselves if it is suitable for them.

Itineraries and inspirational content can also be found on the Visit Kent website, 17 of which provide accessibility information.



- Itineraries need to have a target audience in mind before being created
- How potential visitors will travel between locations and needs such as food, toilets and overnight stays must also be considered
- Research has shown that potential visitors engage more with inspirational content as apposed to fully detailed itineraries, hence why Visit Kent provided a series of inspirational content to go alongside itineraries

Exciting interpretation - bring assets to life for visitors (T2.2.5)

Kent Downs delivered 2 X exciting interpretations to offer visitors a unique way to Experience Kent's tourism offer. The Darent Valley Airstream is a renovated 1950's Airstream Bubble that features information about nature including a unique virtual reality experience. The Darent Valley App allows visitors to digitally explore the Darent Valley tourism route featuring details of the route itself as well as information on its heritage.



- It is key to consider the long-term upkeep and re-use of any assets created to ensure a lasting legacy

Closing last mile gaps in tourism services (T2.2.6)

Kent partners worked closely with rail partners to maximise rail connections to tourism offers minimising last mile gaps between public transport and tourism offers. A series of rail adverts were produced in WP5 to advertise EXPERIENCE work and 17 different rail leaflets were produced to enable visitors to enjoy walks directly from train stations. WP3 training materials for businesses also included how to offer a baggage transfer service to walking and cycling visitors to manage the last mile gap for this audience.



- Experience has shown us that true solutions to last mile gaps need to be sustainable, and if they involve commercial partners must be viable in the long term

WPT2 CASE STUDY

EXPERIENCE DEVELOPMENT PROGRAMME SME; ROMNEY MARSH SHEPHERD HUTS

What we do:

My name is Kristina Boulden and I am the Company Director for Romney Marsh Shepherds Huts. We have been family farmers on the Marsh for over six generations. We run a mixed farm with over 1000+ sheep whose breed is indigenous to the Romney Marsh. Initially we diversified our farm with our Romney Marsh Wools business which was all about turning sheep's fleeces into our own range of clothing and garments. As a result of attending local events people asked if they could come and stay on the farm too. In 2018, we launched the Romney Marsh Shepherds Huts which we have been bespoke built by local craftsmen and now allows us to share our unique landscape on the Romney Marsh. We have worked with Visit Kent for several years who have been able to provide us with key market data showing how tourism is involving in Kent. I was introduced to the INTERREG EXPERIENCE project during one of the Visit Kent business engagement events. I jumped at the opportunity to be part of the Experience Development Programme. It gave us the opportunity to access new markets, a network and gain knowledge which we would not necessarily have had been able to dip into had we have not been involved with Visit Kent.

How we do it:

Whilst Romney Marsh Shepherds Huts has benefited from being part of the Produced in Kent initiative, the INTERREG EXPERIENCE project has brought us something new. It has helped us focus on the types of experiences and the key messaging we want to give our customers. Knowledge that we would not have access to if we would not have been guided by the project. What we do have here as generational farmers is a unique knowledge of the local area and we find that when people come and stay with us, they do want a bit of hand holding to be able to have the best experience during their stay. For example, the Marsh Safaris visitors are able to be guided around the area and learn about the history of the local churches. The vineyard tours often start from the huts, include a lunch somewhere with tasting of local wines before our visitors are dropped back here afterwards. These are great examples of local businesses collaborating together to provide unique insights to our visitors that leave them with great memories.

Impact:

Looking forward, I am really excited to be part of the initiative Discover Your Kent Experience run by Visit Kent through the INTERREG EXPERIENCE project that has invited us to be one of the tour stops for the 10 tour operators who will visit a range of experiences in Kent in February 2023. That hopefully, will allow us to reach much further than we could have done without the project.

Collaboration between businesses has been key here and thanks to Visit Kent, the EXPERIENCE project has created the opportunity to bring local businesses together to provide visitors with the best experiences we can offer. As a result, we are now offering a solution that includes the best of Kent which is in part down to this new collaborative approach that has enabled us to better work together to provide unique experiences.

Our Tips:

I would recommend these types of projects as the network alone has enabled me to meet other likeminded businesses, I was not aware of. It has flagged up opportunities, ideas and best practice sharing. For example, at one of the networking meetings, I met Doddington Place Gardens who talked about green tourism and certification and because of that I have started that journey as we too want to tell our customers that sustainability and looking after our environment is what we are all about here. The certification will give confidence and a feel good factor to our customers knowing that we are making the right steps and doing all we can for our environment.



Watch the interview
here



WPT2 CASE STUDY

1 TO 1 MENTORING (T2.2.2): CANTERBURY BREWERS AND DISTILLERS



Starting point

This established business had a great starting point being a product in a niche market, a strong track record and expertise and with clear potential for an online presence. In addition the business owner had the resources to be ready to deliver services in a physical space for when real life post COVID. The business is based on the passionate and energetic business owner with huge potential but also needing to widen the decision-making roles in the business to grow sustainably.

Key improvement through Visit Kent programme

The Visit Kent programme helped the business owner achieve:

- Taking time to think through that having a plan would help him achieve goals more effectively.
- Thinking through the longer-term roles and responsibilities and the essential need to communicate with and involve his wife much more. (Any business plan that existed was all in his head. This means that involving others was virtually impossible and would continue to be a weakness to really meet the goals and full potential).
- Having clarity on the target market and then what platforms and contacts to use.
- Realizing the many marketing assets, he already had and how to use them better strategically.
- Knowing to challenge his accountant to serve the business better and help him plan for tax implications, cashflow, investor income and for personal financial planning reasons.
- Clarity the financial structure of the business. Since starting the financial side had evolved but had no structure which is a weakness at this point of growth and means the business could be vulnerable in the future.
- Identifying and shaping clear specific actions compared with frantically racing around and not putting energy into a defined strategy.

Outcomes within the programme timescale

Within the timescale of the programme these are aspects the business owner put into action:

- A clearer marketing plan - including reaching out to international targets.
- A clear financial plan for investment (and knowing what to prioritise investing in) and clear financial systems installed and able to provide up to date and forecasting information.
- A clear appreciation that his communication needs to improve for the business to really succeed.
- A clear focus on what is really needed.

Quite simply a business that can reach full potential and have an impact on the economy in Canterbury.

Feedback

"In 10 minutes, you have helped me know more than the years I have been with my accountant"

"The communications clarity means we are a team not just me dashing around enthusiastically"



[HTTPS://WWW.TOURISMEXPERIENCE.ORG/](https://www.tourismexperience.org/)



EVALUATION OF ECONOMIC, ENVIRONMENT & SOCIAL IMPACTS OF THE INTERREG EXPERIENCE PROJECT IN KENT

PART 3- DELIVERING OFF-SEASON TOURISM INFRASTRUCTURE IN
THE KENT PILOT REGION
(WPT3)

KENT PILOT REGION REPORT 2023 (T5.1.3)



DELIVERING OFF-SEASON TOURISM INFRASTRUCTURE IN THE KENT PILOT REGION (WPT3)

EXPERIENCE Challenge 4 (C4): 'Infrastructure is not adapted for use October-March'.

The approach to address C4 was to adapt key rural tourism infrastructure and create iconic art trails connecting visitors with the cultural and environmental assets of the Kent Downs.

WPT3 ACTIVITIES SUMMARY

- Upgrades to tourism routes - 12
- Changing places upgraded- 1
- Iconic Art Trail - 1
- Accessibility Infrastructure - 3

Upgrade tourism infrastructure (T3.2.1)

Infrastructure upgrades were made at 4 off season tourism routes which involved resurfacing to ensure more use for people with mobility needs especially in the off season. New signage was also installed to ensure easy access. A large-scale resurfacing for improved mobility needs access was completed at Landgon by the iconic White Cliffs of Dover, and Changing Places toilets for the profoundly disabled were installed at Lullingstone country Park as well as improved disability access routes and equipment at Manor and Lullingstone Country Parks. An iconic North Downs Way Arts Trail was delivered featuring 9 artworks and this has featured on regional television reaching over 500,000 people.



- Regional media were really interested in the Arts Trail and involving them early helped promote the product to a very large audience.
- Engaging with local people on the Arts Trail development ensures that the investments will be cared for and cherished locally long after the project finishes.
- Sharing best practice with other regions (PP1 and PP10) helped Kent develop criteria to ensure an authentic and world class offer.

Innovation incubator - place making tourism infrastructure (T3.2.2)

The North Downs Way Riders Route was delivered as the Innovation Incubator. This innovative route allows the long distance riding of the North Downs Way National Trail as a year round tourism offer. The route was upgraded in a number of ways including resurfacing to improve access and new signage and promotion. 15 special gateway signs were installed at each section of the route from Surrey through to Dover in Kent, explaining how to enjoy the route and what is special about each section including last mile connections to railway stations. The gateway signs also serve as the permanent billboards celebrating the EU and EXPERIENCE funding for all the investments in Kent.



- Planning promotion campaigns in advance ensured products could be shared widely
- The needs of cyclists and horse riders need to be considered individually

New Tourism Infrastructure and facilities (T3.3.1)

A new Changing Places toilet for the profoundly disabled was installed at Shorne Country Park along with interpretation to explain the EXPERIENCE project and the facility.



- Engaging with people with lived experience of additional needs was essential to ensure the infrastructure provided was fit for purpose.

WPT3 CASE STUDIES

INFRASTRUCTURE IMPROVEMENTS: SHORNE COUNTRY PARK



WE INVESTED IN INFRASTRUCTURE TO PROVIDE YEAR-ROUND ACCESS TO NATURE FOR THE PROFOUNDLY DISABLED

Shorne Country Park is a very popular green space in Gravesend Kent close to many urban and urban fringe populations. It is known as a Gateway to the countryside and the Kent Downs AONB National Landscape, with parking, café and pathways it allows easy access to a taste of the public rights of way and rural experience that the wider countryside has to offer.

We paid for the installation of a Changing Places toilet which allows families and carers of the profoundly disabled to access nature knowing they have a toilet facility that caters for their complex needs. (Hoists, adult size nappy change etc).

Improvements were made to pathways that enable wheelchair access but also enable winter access to a wider audience as well as a winter outdoor shelter area as an alternative to the welcoming indoor café area. We commissioned UoS market research around the accessibility audience and we worked with the Changing Places specialist marketing team to advertise the new facilities correctly. Specific training to onsite staff will be provided.



[HTTPS://WWW.TOURISMEXPERIENCE.ORG/](https://www.tourismexperience.org/)



EVALUATION OF ECONOMIC, ENVIRONMENT & SOCIAL IMPACTS OF THE INTERREG EXPERIENCE PROJECT IN KENT

PART 4 - DELIVERING EXPERIENTIAL TOURISM
MARKETING & DISTRIBUTION
(WPT4)

KENT PILOT REGION REPORT 2023 (T5.1.3)



visitkent.co.uk



DELIVERING EXPERIENTIAL TOURISM MARKETING & DISTRIBUTION (WPT4)

The approach to tackle C5 was to use an intel-led approach fuelled by industry insights and product concept testing to create engaging content, campaigns and market penetration.

WPT4 ACTIVITIES SUMMARY

- B2B Marketing testing report
- Consumer testing reports
- Digital Lab reports
- Targeted photography
- Targeted marketing campaigns
- Trip planning platforms
- Travel Trade engagement
- 65 access guides across 29 businesses

WPT4 OUTPUTS

Marketing testing with trade and distribution channels (T4.2.1)

Visit Kent (PP3) conducted market testing with business events and travel trade contacts and buyers, to provide much needed guidance for local Kent businesses, surrounding the potential interest and demand for off-season product themes and experiences.

These sessions aimed to offer a valuable insight into demand, packaging, and bundle options, and understanding audiences and key challenges when working with these markets. Essentially, these insights will help to inform experiential tourism product development and help to create collaborative ventures between partners.

This research will also be key in allowing businesses to gain a more in depth understanding around working with the travel trade and business events market to offer products that are suitable for contracting and distribution.

Data for B2B market testing was conducted through the following methods:

- Travel Trade & Mice Survey
- Focus Groups
- Virtual Fam Trip*

EXPERIENCE Challenge 5 (C5): 'FCE region is not known for experiential tourism: assets are underdeveloped and poorly promoted.'

Traditionally familiarisation trips take place in person and this would have been our preferred method, however due to restrictions in place through the Covid-19 pandemic this was not possible.

Throughout these methodologies the following product concepts were tested:

- Food, drink and artisan experiences
- Nature and wellbeing
- Photography/Arts/Craft experiences



- It would have been useful to have developed trade specific content within the experience development programme to truly benefit from the gained insights
- Operators valued being involved in the product development stage, however this has not culminated in increased engagement moving forward
- Visit Kent received great insights from a variety of operators who we had not previously worked with

Consumer testing (T4.2.2)

Both Visit Kent and Kent Downs conducted product testing with consumers in the Kent Pilot Region.

Visit Kent ran a consumer campaign built around an A/B testing model in order to determine audience preferences and motivations, overlaid with data accrued from a YouGov Survey designed to create insights to inform future Experience content creation and promotional activity for use by Visit Kent and stakeholders. The A/B testing campaign was also supplemented by a YouGov brand Survey.

Kent Downs carried out a number of activities, which included an audience research programme, lead generation campaign, keywords and search trends and experience theme research to understand audience behaviour, preferences and motivations. In addition we commissioned a YouGov Survey to gain insights into their intentions to travel for leisure, to visit Kent as a tourist, which activities they're likely to do and the role sustainable tourism plays in their decision making.

WPT4 OUTPUTS CONT...

The following outputs were created as part of the Consumer testing:

- Fabricca Experience Research Report (Visit Kent)
- Fabricca Experience Research Reports (Kent Downs, Find Your Space)
- Keywords and trends report
- EXPERIENCE Competitor Analysis
- Fabricca Lead Generation Campaign



- Themes that tested well and resonated with our consumer audiences were used as key themes within the Up the Kent Downs campaign.
- YouGov findings were useful and further reports have already been commissioned
- A/B testing was useful, however our approach was broad with many themes, if we were to do this again we would focus on 1 or 2 key themes with a control over variables
- The Experience Research Report (Find Your Space) was highly detailed and involved, which often led to contradicting results.

Testing new offer and services in a digital lab (T4.2.3)

Visit Kent submitted 8 pieces of material to The University of Surrey (PP9) to put through their Digital Lab process to test consumers rational and emotional triggers of consumption, and ultimately measure 1. Advertising perception, 2. Purchase intention, 3. Links between rationality and emotion in decision-making. This was conducted through eye-tracking, galvanic skin response and facial electromyography.

The 8 materials Visit Kent (PP3) tested were:

- Facebook imagery
- Instagram imagery
- Instagram video influencers
- Instagram video narrative
- Website content - outdoor cooking
- Website content - Oyster Farm
- Website content - Think you know Kent
- Website content - Your Kent Experience



- It would have been better to conduct the analysis before marketing campaigns launched
- Using the findings, we were able to adapt our messaging and adapt our approach across all our campaigns.
- If we were to conduct digital lab testing again, we would use a more scientific method, using a control and then a number of variables to measure how different approaches to the same content impacted consumers perception and intention.

Targeted consumer campaigns (T4.3.1)

Visit Kent (PP3) delivered a comprehensive catalogue of campaign activity throughout the project including:

- Always on activity
- Must Visit Kent campaign
- MVK Publication - 10,000 copies printed
- MVK section of the Visit Kent website
- Influencer activity
- Out of Home activity across London and at WTM
- Features in Nat Geo Traveller - Article and ad (Ad value of £95,184)
- Adsmart - 433,000+ impressions
- Organic social and newsletters

In 2021, we learned that the international publication and travel company Lonely Planet had declared Kent's Heritage Coast as one of the world's best regions to visit for 2022.

Capitalising on the opportunity, we developed Must Visit Kent to maximise the exposure and opportunities of Lonely Planet's "Best in Travel" award. The campaign showcased our destinations across Kent as the themes highlighted by the award resonated across the county - such as the landscape, culture, sustainability and heritage.

Throughout 2022, we worked with a variety of Kent's tourism businesses on a domestic marketing campaign, dedicated travel trade promotion, PR activity, a publication, a partnership with TripAdvisor, and much more across a range of channels, including social media, video on demand and paid search.

Visit Kent also worked with AccessAble a industry leader in providing accessible information to tourists with accessibility needs. AccessAble worked with 29 businesses to create 75 Accessibility guides, which are linked from the Visit Kent website. These guides have been used to create 17 "accessible" itineraries provided on the Visit Kent website.

Kent Downs (PP2) delivered five marketing campaigns targeting consumers, which included the Kent Pilgrims Festival, Up The Kent Downs (flagship consumer campaign), North Downs Way Riders Route and The Great Artdoors - North Downs Way Art Trail.

Each campaign involved the creation of a visual identity, developing new content - including dedicated web pages, organic social media, regular consumer newsletters, paid for media (online and offline) advertising, PR activity (press releases, FAM press and influencer trips, etc), new photography and video clips.

Overall consumer campaigns and communications activity reached more than 14.9 million people between July 2022 and March 2023.

WPT4 OUTPUTS CONT...

The following outputs were created from the Kent Downs campaigns:

- Dedicated website pages and content that can be repurposed/refreshed for future activity
- Campaign toolkits, for example here are the live links to the Up the Kent Downs and The Great Artdoors toolkits shared with stakeholders and local businesses.
- Developed a content and events planner with monthly themes to help curate engaging content across our digital channels (social media, blogs, website, newsletter).
- Built strong relationships with Match Funders, Active Inclusion (Muslim Hikers) and key stakeholders that will continue beyond the project.
- Development of consumer mailing list and sending out monthly tourism themed newsletters
- Development of TikTok strategy targeting new audiences.
- Creation of Flickr photo library and new photos and film clips to build on our asset bank.
- Produced end of campaign reports for each campaign and commissioned two new audience research reports to understand the impact of our targeted consumer campaigns.

The Key messaging for the Up the Kent Downs Campaign was to:

- Promote new autumn and winter 'experiences', to extend the tourist season.
- Benefit local economies with all-year round sustainable tourism
- Target all key Kent Downs audiences.
- Show how accessible and inclusive the area is.
- Showcase authentic, unmissable, sensory and immersive experiences throughout the year.



- We have to work with the right people, selecting the right agencies and media partners provides efficiencies and improved outputs
- The performance of paid media delivered by Fabbriaca across campaigns was consistently exceeding objectives.
- Too many strands of activity make the campaign difficult to manage
- It is important to accept that some things are out of your control (Covid/Strikes/Queens passing/ Operation Brock)
- Complex messaging reduces campaign effectiveness
- Our work with diverse groups and influencers has helped us reach new audiences and improved engagement levels. Our Muslim Hiker event, in particular, was very successful.
- Packaging up and promoting all the new products and delivering one overarching campaign worked well in terms of raising awareness of the Kent Downs and experiences and being able to deliver a more effective campaign.

Online pre-visit inspiration and interactive trip-planning platforms (T4.3.2)

Following research conducted through Experience it was shown that rather than fully detailed itineraries consumers were more engaged with inspirational itineraries and related content. As such Visit Kent developed a suite of new itineraries in WP2 (T2.2.4).

These itineraries alongside inspirational content have been compiled into themed pre visit inspirational content sat within a new Experience section on the Visit Kent consumer facing website, providing consumers with a simple user experience and access to intel-led targeted content designed to make them change from being inspired to booking.

Following research conducted through the early stages of the Experience project, Kent Downs developed and launched a brand new consumer facing website with a much improved user journey and consumer experience. PP2 has made it easier for consumers to find inspiration and plan their visit.

Examples include:

- Create their own inspiring itinerary using the new itinerary builder functionality
- Browse and choose any number of inspirational Experience itineraries, based on length of stay or theme, such as Power Downs, Wine Downs and more.
- Search for places to visit, stay and eat, find things to do and local events, and look up a North Downs Way Ambassador with the new listings functionality.
- Create dedicated campaign landing pages for Kent Pilgrims Festival, Up the Kent Downs and The Great Artdoors.
- Integrated the Kent Connected app plug in to promote sustainable travel.
- Cross market nearby experiences, places to visit and things to do.
- Introduced a new blog function and created monthly blogs to share compelling content to encourage consumers to visit and stay.
- Google Analytics search optimisation



- Both Visit Kent's and Kent Downs websites have received more users, increased page views per session, longer dwell time on site, lower bounce rate and more sessions overall. These are all indicators of the content being relevant and of good quality.
- Landing pages for campaigns and new products work well.
- Find an activity search shows walking to be the most frequently searched activity.
- Website traffic has increased by more than 30% since March 2022.
- Tourism is new territory for Kent Downs (PP2) and new for our traditional audience. However, early signs show consumers are interested in the Downs and the content, experiences and online activity is useful and relevant. There is scope to grow this audience and the website will play a key role in positioning the Kent Downs as a sustainable tourism destination.

WPT4 OUTPUTS CONT...

Travel Trade & distribution (T4.3.3)

The Travel Trade and B2B distribution is a key component of Kent's tourism marketing strategy. Inbound tourism is the UK's third largest service export industry and fifth largest export industry, employing over three million people. In 2019, international visitors spent £28.4 billion and contributed £5.5 billion in VAT alone. Many of our members rely solely on inbound tourism, with key markets including the USA, China, and the EU.

Visit Kent and Kent Downs attended a range of trade shows, including World Travel Market, Britain & Ireland Marketplace, the Go Travel Show and UK Inbound conferences to meet companies, organisations and media from across the global industry.

Visit Kent, collaborated with tour operators AC Tours and Tour Partner Group to deliver joint marketing campaigns to international markets. Kent has also been host to a range of travel trade industry partners to showcase the new out of season experiential products developed.

A Meetings, Incentives, Conferences and Events (MICE) specific campaign was also delivered to showcase the great B2B offering which has also developed post-covid.

The Kent Pilot region attended the following shows & events

- Coach Tourism Association Conference
- ETOA Britain & Ireland Marketplace
- UKInbound Conference
- World Travel Market (WTM)
- Hosted dinner with Avanti Destinations and AC Tours

Campaigns included:

- AC Tours and TPG both created a series of itineraries to sell to their target markets
- Monthly newsletters sent to customer database
- Social Media marketing
- Video promotions
- Sales calls to top 100 clients
- Listings on websites and homepage banners
- Staff training and familiarisation trips

Visit Kent partnered with UKInbound to deliver a Discover Kent event hosting 18 international travel trade industry representatives to discover what Kent has to offer to their customers. Attendees were met by Visit Kent staff to discuss new experiences created through the EXPERIENCE programme as well as experiencing some sights and experiences themselves.

Visit Kent worked with Pillory Barn to deliver a business events campaign to rebuild confidence in the local business events market by developing and delivering a campaign that will promote both businesses events venues and unique delegate experiences to a local business audience.

Over the course of 2021 -22, we've seen the start of a positive recovery for the travel trade industry for both domestic and international markets in Kent. Tour operators are reporting a busy summer, with the North America market driving the demand, due to low exchange rates and high demand for travel. Germany, The Netherlands and the Nordics are also seeing strong levels of return to the wider UK. Looking ahead, operators are seeing positive levels of enquiries and bookings for 2023, however it is still predicted that we won't be back to 2019 levels until 2024+.



Despite this, challenges still remain. The energy crisis, inflation, and the covid crisis (particularly in Asian markets) is not completely behind us. Staffing and flight allocations have been the biggest challenges across the whole of the UK, and for Kent in particular, availability of hotel accommodation is decreasing due to several long-running Government contracts in place. The coach and groups market is seeing a slower recovery due to a lack of coach drivers, plus the international student market is affected by lack of host families, collective passport issues and increased costs.

Anecdotal feedback shows that there is a lack of new product development from operators for 2023, however due to the shift in consumer behaviour, we're seeing existing products and itineraries being adapted to cater for smaller groups, experiences (particularly luxury / bespoke options) and free or low-cost activities, combined with elements of sustainable delivery.

WPT4 CASE STUDY

DISTRIBUTING NEW EXPERIENTIAL CONTENT WITH THE TRAVEL TRADE - AC TOURS

What we do:

My name is Rob Russell, and I am the CEO of AC Tours an award winning inbound tour operator and destination management company based in London. Established in 1999, AC Tours offers ad-hoc, special interest, series and incentive leisure group tours and individual services. AC Tours offers leading bespoke luxury travel operations. We offer a one stop shop, multi-channel booking solution for accommodation, services, transport and unique travel experiences found throughout Great Britain, Ireland and France.

How we do it:

Through our partnership with Visit Kent in the INTERREG EXPERIENCE project, we have been given excellent access to a wide range of brand-new tourism products and experiences. This has given us a unique opportunity to include these new experiences in our activity, all of which have come with quality imagery and audio-visual material. This saves time and helps us to immediately transform these activities into our range of itineraries which we have promoted to USA, Canada, Benelux and Germany, all who have a strong demand for new sustainable products and experiences that give people the opportunity to escape for the larger cities in favour of experiential, rural activities.

Impact:

This has given us a broader offer for our customers thanks to a wide range of innovative experiential activity which were not previously connected with in Kent. The quality imagery and audio-visual material made available to us has made it quicker for our travel experts to turn around these quality itineraries and get them out to our network in time for the 2023 and 2024 seasons.

Our Tips:

- We really recommend that businesses and attractions work closely with their local DMOs who have the expertise and knowledge that can help travel trade companies like ours with recommendations, introductions and content that is so important in developing new out of season products rapidly;
- When creating a new experience think of the travel trade from the get-go and think of how you might work with the travel trade and understand what you can do to facilitate easy contracting and less hassle for operators;
- We recommend that the travel trade industry look beyond business as usual to the opportunity to partner innovative projects that are financing new experiences to get them ready for market in the months ahead. Projects like the INTERREG EXPERIENCE have allowed us as trade operators to access new, innovative experiences that are market ready.



WPT4 CASE STUDY

MAKING THE TRANSITION TO EXPERIENTIAL MARKETING JIM DAWSON, VISIT KENT

What we do:

My name is Jim Dawson. I am the Head of Creative Digital and Marketing for Visit Kent. In 2021 and 2022, we began to shift our content and PR strategies towards a more audience-led, targeted approach. Thanks to the INTERREC EXPERIENCE project, we benefitted from research that led to the creation of four audience profiles. Our research team was able to map out their demographics, interests and key decision-making points. As a marketing team, we have used this research to steer our content strategy, creating highly targeted feature content which we have been able to promote to each of the four key audiences through a programme of digital campaign activity. In essence this shift in strategy has allowed us to place the right content in front of the right people at the right time.

How we do it:

The way we did this involved careful planning at the start of each quarter. Our marketing, research and partnerships teams worked together to map out key themes for each quarter, be it seasonal highlights or key national and international events. We then looked at our four audience groups and planned out the type of content they would actively use during the upcoming quarter. From there, our team researched, wrote and promoted a series of editorial style content, keeping the relevant audience in mind at all times, and ensuring the content was promoted at the best time and on the best channel to capture interest and engage new visitors. In addition to improving the relevance of the content we create, INTERREC EXPERIENCE has also enabled us to work with a number of influencers on social media. Fuelled by the research we have regarding our key audiences, our PR team identified third party influencers, whose platforms engaged each of the target audiences. From there we created itineraries, using all of the new visual content gathered from the new Experiences across Kent keeping in mind that audience's interests. The influencers then created content in our destination, sharing it with their audience.

Impact:

The impact of the influencer trips we have been able to host has been huge. In the last two years alone we have hosted 25 influencer trips, allowing us to showcase our destination to new audiences in an engaging way, using the influencer's own voice and impressions to create a new and authentic picture of our destination. The shift in our content strategy has also been hugely impactful. Our feature content is now the most viewed area of the Visit Kent website, with our audience-led features helping to generate an average dwell time of around two and a half minutes. These numbers indicate that consumers are not only landing on our content, but they are genuinely interested in it, and this is because the content has been targeted to their needs and wants at a particular time.

Our Tips:

- Understand your audience – develop a picture of who they are and what interests them
- Use your research and analytics to understand when they are seeking out certain content – there is no point producing a feature about school holiday breaks a week before they begin if families are booking their breaks two months in advance;
- Build relationships with influencers. The more you work with them, the more they will support you. We have found that some of our longest relationships with influencers have produced additional bonus content;
- Plan your content in advance. The more you plan the content you want to produce for your channels, the easier it will be to produce high quality content. Planning will also allow you more time to react to any last-minute content opportunities;
- Get your wider team involved. This means working with those outside of your marketing team, particularly those who have regular contact with your key stakeholders. This will ensure that what you are delivering will benefit and provide value to those you are trying to serve;
- Be prepared for some trial and error. Not everything you plan out will work, but it's important to try new things and learn from your data and analytics.



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EVALUATION OF ECONOMIC, ENVIRONMENT & SOCIAL IMPACTS OF THE INTERREG EXPERIENCE PROJECT IN KENT

PART 5 - EVALUATING & IMPROVING SUSTAINABILITY WITHIN
NEW OFF-SEASON TOURISM OFFER
(WPT5)

KENT PILOT REGION REPORT 2023 (T5.1.3)



KENT
GARDEN of ENGLAND

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France (Channel
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EXPERIENCE
As part of the Local Growth Fund



EUROPEAN UNION
European Regional
Development Fund

EVALUATING & IMPROVING SUSTAINABILITY WITHIN NEW OFF-SEASON TOURISM OFFER (WPT5)

Kent's approach to recording and evaluating sustainability within the new off season tourism offer was to ensure that any research conducted during the project must be able to be replicated once the project ends, this is to avoid collecting data which has no long term value or benchmarking qualities. Visit Kent already use the Cambridge Model every other year. Due to the impacts of Covid it was agreed to increase this to yearly to monitor the impacts of Covid on the visitor economy. Providing Kent with accurate data to lobby government for further support.

The residents survey was something which has been used on an ad-hoc basis previously, however Visit Kent have now committed to repeating this on a yearly basis.

WPT5 ACTIVITIES SUMMARY

- Cambridge Model reports - 3
- Resident research waves - 6
- Sustainable tourism action plan

WPT5 OUTPUTS

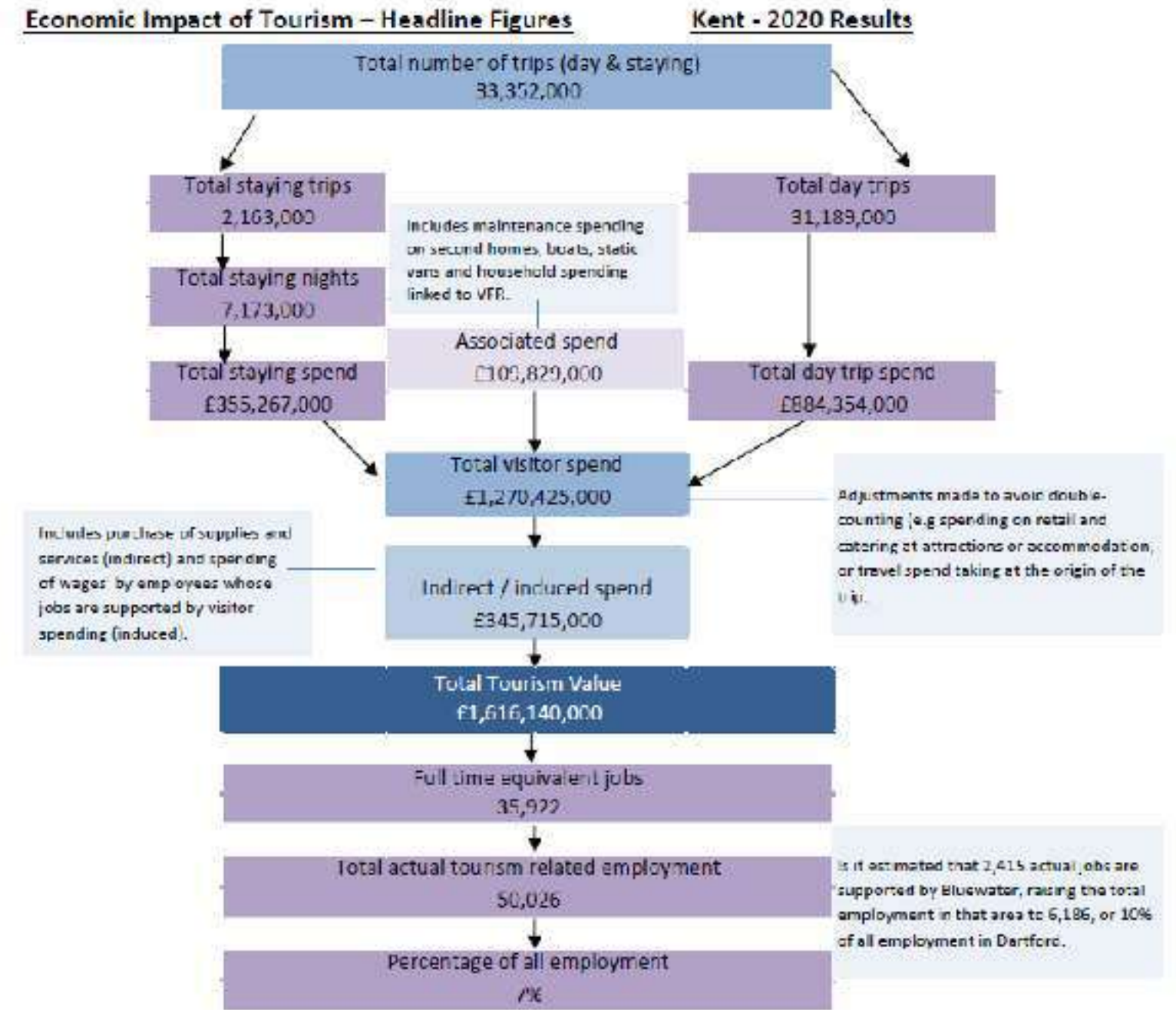
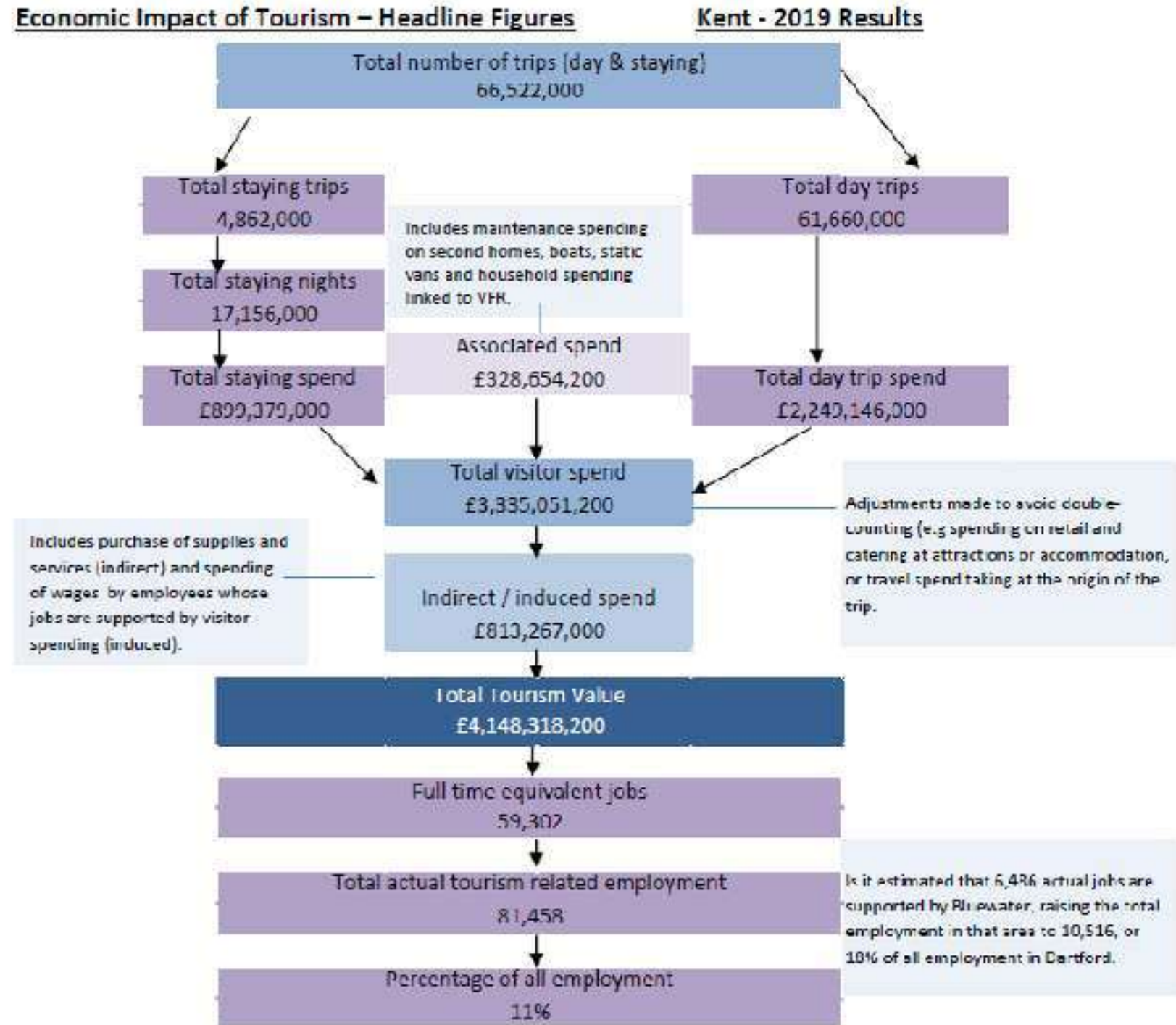
Economic Performance (T5.2.1)

Kent commissioned an external contractor to monitor the economic performance of tourism in Kent during the course of the project. This allowed us to monitor progress and recovery during and post Covid lockdown periods. This will also allow us to monitor impact after the closure of the project. In 2019 total number of visitors (day trip and overnight stays) to Kent was 66.5 million. This fell due to the pandemic but numbers had started to recover with 33.3 million visitors during 2021. 2022 and 2023 figures are not yet available.

For the Kent Downs AONB (PP2) area in 2019 there were 9 million visitors. The number of visitors to the Kent Downs had recovered to 8.6 million in 2021 which shows that tourism is recovering faster than in the county as a whole. This, of course, cannot be wholly contributed to the EXPERIENCE project but as the largest tourism project in Europe we can allocate some of the trends and recovery to EXPERIENCE activity.

In 2019 British residents took 99.7 million overnight trips in England (down from 100.6 million overnight trips in 2017 totalling 290 million nights away from home (down from 299 million nights in 2017 Expenditure reached £19.40 billion (up from £19.05 billion in 2017). The spend per trip was £194.58 and with an average trip length of stay of 2.9 nights, the average spend per night was £66.89. The South East region experienced a 3% decrease in overnight trips between 2017 and 2019 bednights were down 2% on 2017 and expenditure was unchanged since 2017. The region received slightly less visitors in 2019 than in 2017 but visitors spent slightly more per night than in 2017. The average spend per trip was £161.37 and with an average length of stay of 2.66 nights, the average spend per night was £60.56. The GB Tourism Survey data is a key driver for the Cambridge model. However, it is not specifically designed to produce highly accurate results at sub regional level. In order to improve the accuracy of results we have applied a 3 year rolling average to this data to help smooth out short term market fluctuations and highlight longer term trends. As such, county and district level results relating to 2019 are an average of 2017, 2018 and 2019. The domestic tourism results for Kent used in this model combine a mixture of supply and demand data. We do this because extracting county level data from national surveys can lead to inaccurate results due to low sample sizes. Our results show a 1% decrease in the volume of trips between 2017 and 2019. Nights were down by 2% and expenditure was also down by 1%.

In terms of visits from overseas, the International Passenger Survey (IPS) data is a key driver for the Cambridge model. However, as with the GBTS, it is not specifically designed to produce highly accurate results at sub regional level. In order to improve the accuracy of results we have applied a 3 year rolling average to this data to highlight longer term trends, whilst helping smooth out short term market fluctuations and reducing the impact of any methodological changes affecting the survey. As such, county and district level results relating to 2019 are an average of 2017, 2018 and 2019 results. At national level, the number of visits in 2019 was 36.1 million (33m in 2017). The number of visitor nights spent in England in 2019 was 252.4 million (245.7 million in 2017) with the average number of nights per visit standing at 7.99 in 2019 (from 7.45 in 2017). Expenditure in 2019 was £24.78 billion, slightly below the £24.94 billion achieved in 2017. Overseas trips to the South England region were down by 1% compared to 2017 at 5.4 million overnight trips. The total number of nights was 36.8 million, down slightly from the 37.4 million nights in 2017. Expenditure in 2019 was £2.58 billion, up 11% from £2.32 billion in 2017. Kent experienced a 3% increase in the volume of trips between 2017 and 2019. Nights were down by 7% and expenditure was also down by 6%. The International Passenger Survey is conducted by the Office for National Statistics and is based on face to face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland. The number of interviews conducted in England in 2019 was 25,147.

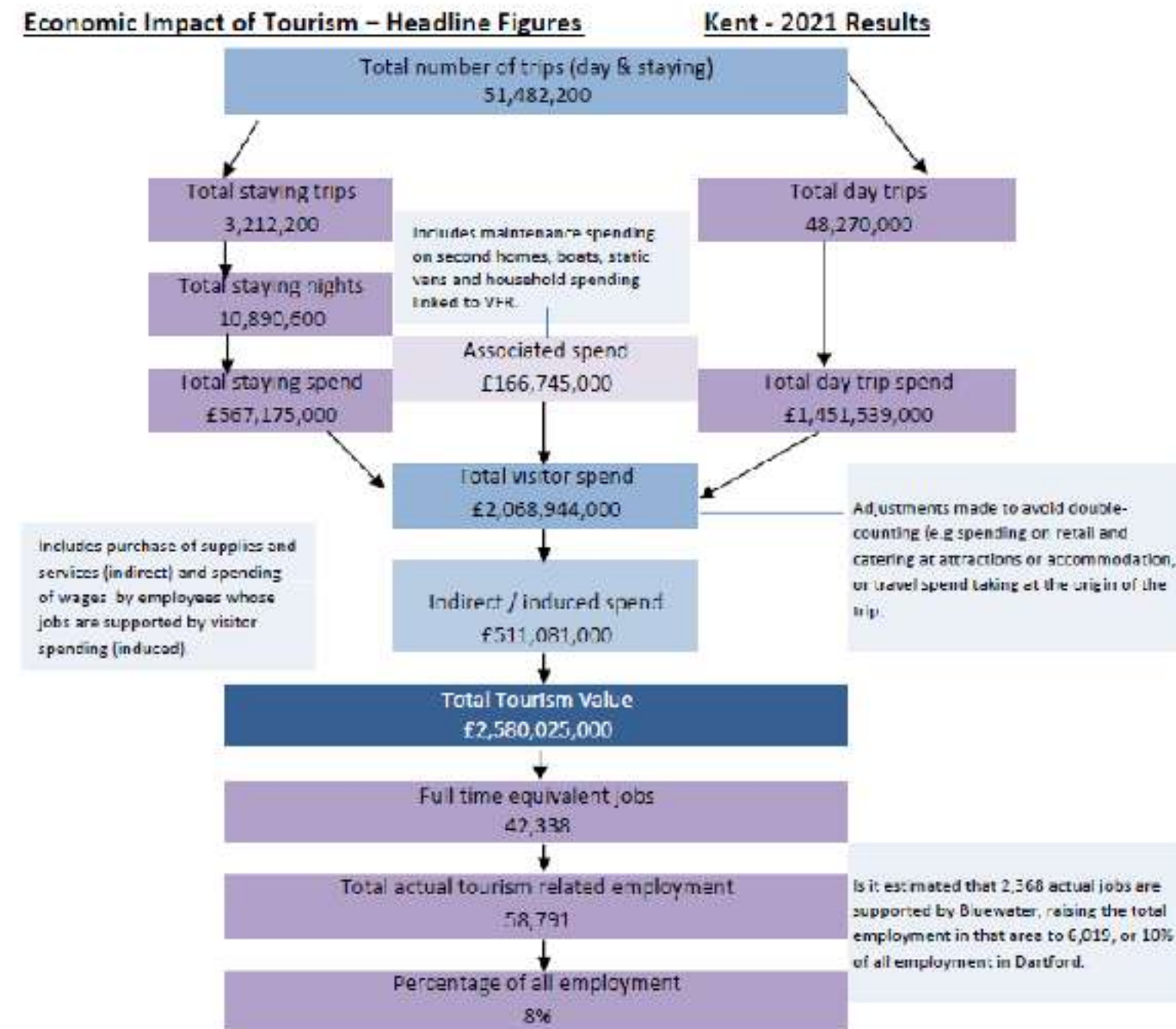


Economic Impact of Tourism – Year on year comparisons				Year-on-year comparison	Pre-pandemic levels
	2021	2020	2019	2021 v 2020	2021 v 2019
Day Trips					
Day trips Volume	48,270,000	31,189,000	61,660,000	55%	-22%
Day trips Value	£1,451,539,000	£881,351,000	£2,249,146,000	64%	-35%
Overnight Trips					
Number of trips	3,212,200	2,163,000	4,862,000	49%	-34%
Number of nights	10,890,600	7,173,000	17,156,000	52%	-37%
Trip value	£567,175,000	£355,267,000	£899,379,000	60%	-37%
Total Value	£2,580,025,000	£1,616,140,000	£4,148,318,200	60%	-38%
Actual jobs	58,791	50,026	81,458	18%	-28%
	2021	2020	2019	2021 v 2020	2021 v 2019
Average length stay (nights x trip)	3.39	3.32	3.53	2.1%	-3.9%
Spend x overnight trip	£176.57	£164.25	£184.98	7.5%	-4.5%
Spend x night	£52.08	£49.53	£52.42	5.2%	-0.7%
Spend x day trip	£30.07	£28.35	£36.48	6.1%	-17.6%

Visit Kent's latest Economic Impact Model for 2021 shows promising signs of early recovery for Kent's tourism industry with the value of Kent's visitor economy increasing to £2.6 billion, a 60% increase from 2020, and 51.5 million combined day and overnight trips undertaken in the county in 2021, compared to 33.4 million in 2020.

The number of tourism jobs across the Garden of England also increased by 18% on 2020 data to 58,791 jobs, accounting for 8% of total employment in Kent last year, despite the Government furlough scheme ending in September 2021.

These latest figures provide the first look at the rebuild and recovery of Kent's tourism and hospitality sector during 2021. Using the industry-respected Cambridge Economic Impact Model, the study measured the volume and value of tourism within the county in 2021, and the effect of visits and visitor expenditure on the local economy throughout this tumultuous period. England entered its third national lockdown on 6th January 2021 and began the 4 Step roadmap for lifting lockdown restrictions, which only formally ended in July 2021. The Government then also announced the 'Plan B' measures in December 2021 following the rise of the Omicron variant.



While the tourism and hospitality picture remained challenging throughout the region in 2021, these latest findings do show that the county's visitor economy performed above the national average across several areas. The overall results show that Kent benefitted from extremely high levels of domestic overnight tourism spending. When compared to the national growth of 64%, Kent's domestic overnight tourism spend increased by an incredible 97% on 2020, generating £477 million in 2021.

When looking specifically at trip purpose, the proportion of those travelling to visit friends and relatives (VFR) in the Garden of England during 2021 accounted for 36% of all domestic overnight trips, and 63% of all international overnight trips. This demonstrates the incredible influence that ongoing support from Kent's residents had on local businesses during a hugely difficult year. Our residents remain our greatest ambassadors - welcoming friends and family to experience our beautiful county first-hand.

WPT5 OUTPUTS CONT...

Environmental performance (T5.2.2)

As part of the perception research in 2021, Visit Kent included 5 environmental indicator questions as part of its T5.2.2 environmental monitoring. Visit Kent created a spreadsheet to track data gathered on the carbon footprint monitoring factors, and followed up with the 2nd survey in 02/23 using the same indicator questions to continue to monitor behaviour and trends.

In terms of tourism's impact on the natural environment, wave 2 showed a sharp increase in those respondents who agreed that tourism is harmful to natural places and has seen fluctuations. This response fell in waves 3 and 4 and was followed by a slight increase in summer 2022. However, looking at wave 6, this saw a decrease of -11%, with 48% in agreement. When looking at the previous 4 waves, results may indicate that respondents are more concerned by the negative impacts of tourism in summer during the periods of increased visitation. However, results overall do demonstrate that residents do feel that tourism can be harmful to the environment, and therefore support an increased focus on sustainable and nature-positive initiatives in the off season.

When looking at tourism's ability to protect and enhance the natural environment, results from across all six waves have been fairly consistent, with around 50% of residents agreeing to some extent that tourism can help to enhance natural areas. Moving forward, it will be vital that tourism organisations continue to work to invest and engage in sustainable projects and circular economy initiatives.



When asked for further information across each of the waves, the following themes emerged:

- Tourism can generate income which can then be reinvested into initiatives and projects to protect and conserve the natural environment, enhance wildlife habitats and build green infrastructures.
- Revenue needs to be managed effectively and is vital to the future sustainability of our destinations.
- Tourism and increased footfall can cause significant pollution, such as littering and excessive traffic so needs to be managed in certain areas to minimise damage caused by visitors.
- Tourism can be a catalyst for various funding and grant opportunities, which can be used to help protect the natural environment. It is also essential that destinations and businesses adopt sustainable tourism policies and educate visitors to respect and protect the environment when visiting.

Building upon the research conducted through INTERREG EXPERIENCE, Visit Kent has developed a sustainable tourism action plan that has supported a range of business and consumer recommendations aimed at reducing environmental impact and carbon emissions (impact heroes - highlight and feature sustainable biz activity). The action plan is measurable in terms of outcomes and research and KPIs have been identified in order to track progress and provide a legacy to the EXPERIENCE project.

Key findings on the environment from the Kent Residents survey:

- Throughout each wave, findings show that respondents are likely to agree that tourism is harmful to the natural environment, with this being higher in the summer season, due in part to increased visitation. In contrast, results also show that on average 50 of respondents agree to some level that tourism can also be a catalyst for preserving and protecting the environment.
- Overall this shows that residents do acknowledge tourism's ability to reinvest revenue and efforts back into the environment, and that tourism can be a mechanism for funding and grant opportunities, to facilitate conservation projects and initiatives. However, responses highlighted that revenue needs to be effectively managed, and that footfall needs to be minimised in certain 'hot spot' areas to maintain vital natural and heritage assets.
- Moving forward, these findings demonstrate the importance of sustainable activity at both a destination and local level, alongside the need to focus on visitor dispersal and nature positive initiatives. This activity should continue to focus on shifting visitor behaviour through effective consumer messaging to both educate and inspire visitors to make this behavioural change through marketing content and campaigns. This can also include sharing examples of best practices through business case studies, to both inspire other businesses to make similar changes, while also helping to shift visitors' and residents' perceptions around efforts to help conserve and protect the environment.

 KDAONB	<ul style="list-style-type: none"> • More likely to be concerned about tourism's harmful impacts to the environment but at the same time are more aware of initiatives to help preserve and enhance the environment • More likely to engage with outdoor and green spaces for walking and cycling more frequently when working from home • More likely to consider their local area as a tourist destination and were more likely to have had friends or relatives to stay in the last six months for leisure purposes • Displayed increased wellbeing and emotional benefits, including an increased sense of pride and connection with their local area, alongside feeling an increased sense of calm and relaxation • More likely to agree that they live in a beautiful area
 Urban	<ul style="list-style-type: none"> • Overall were more likely to agree that there are too many visitors in their local area • More likely to agree that local infrastructure and public transport services are improving • More likely to use local shops and cafes more frequently when working from home and green spaces is less so • And were more likely to express an interest in taking more short-breaks in the county in the future
 Rural	<ul style="list-style-type: none"> • Findings may show that those living in a village were less likely to agree that local infrastructure is improving, alongside local infrastructure development and transport connections • Overall, those living in either a village or rural setting were less likely to engage with local cafes and shops when working from home, however they were more likely to engage with green spaces • In several waves these areas were more likely to be concerned about tourism's harmful impact to the natural environment
 Footfall	<ul style="list-style-type: none"> • Overall, findings show that residents are more likely to observe an increase in footfall in the summer months, and during these periods those living in coastal areas were more likely to receive an influx in visitors. • When looking at district, Folkestone & Hythe, Canterbury, Thanet and Dover were more likely to observe an increase in visitors in most survey periods. Consequently, this may show that these areas in particular are popular with visitors and tourism hotspots, and that residents living there may be more affected by overcrowding.

WPT5 OUTPUTS CONT...

Social Performance (T5.2.3)

Kent conducted six surveys across the project period to assess the residents' views on tourism in Kent. Kent monitored these results for any changes to perceptions. Early surveys showed 88% support for tourism in their local area and 67% agreed they like to meet visitors. This trend continued throughout the project with latest surveys showing 85% supporting tourism.

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

Data collection method from residents: e.g. residents' survey (Winter/Summer), residents surveyed during EXPERIENCE related events / residents' using EXPERIENCE funded infrastructure

- Perceived impacts and benefits of winter tourism
- Impact on wellbeing and emotional connection to local area
- Changes to visitor footfall and local engagement with attractions and facilities
- Resident working patterns and engagement with facilities
- Resident travel behaviour and perceptions of local area for leisure
- Top positive and negative impacts of tourism and overall support

Data was collected through an online survey aimed at Kent residents via Visit Kent's and partners' resident databases and shared via promoted post on social channels. The survey was also incentivised and gave respondents an opportunity to be entered into a prize draw. The survey was targeted at those who live within the county and required respondents be 18 years or over to participate. Respondents' participation in the survey was also voluntary and they were able to discontinue the survey at any point. All data collected was kept strictly anonymous and confidential.

The survey itself was scripted and hosted by the University of Surrey, who are also partners in the project and following data collection, data was shared with Visit Kent to be analysed for the purpose of this report. Prior to analysis, any partial responses up to an agreed point in the survey were removed for consistency and accuracy purposes, which resulted in a total sample size of 1,190 respondents, a sample size that is consistent with previous waves. Furthermore, this provides a robust and comparative sample size. Please note, as not all questions in the survey were mandatory, sample sizes for certain questions may differ.

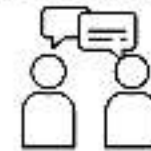
Online survey
to Kent
Residents



12 minutes to
complete



1,190
Respondents



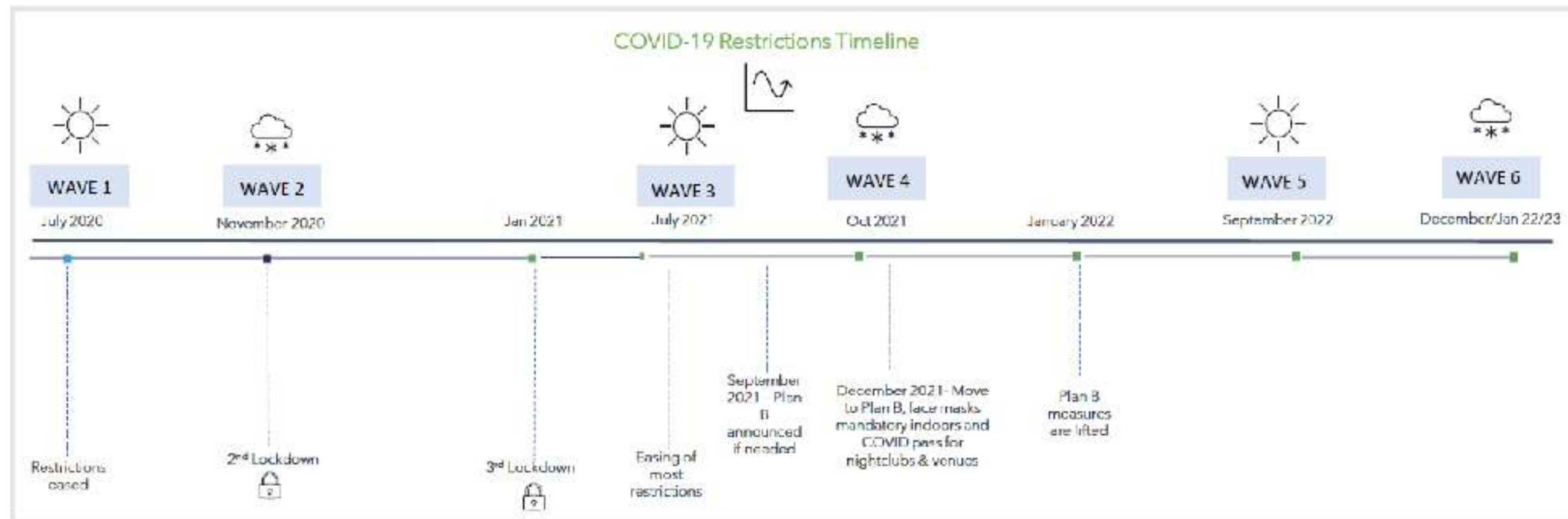
Sustainable growth of seasonal tourism, without compromising eco-systems & quality of life for local residents



WPT5 OUTPUTS CONT...

Given the unprecedented impact of COVID-19, a number of previous waves aimed to monitor the implications of the pandemic. To achieve this, waves 1-3 segmented questions into a pre and post COVID context, however, as the sector emerged from the pandemic, subsequent waves were adapted to bring questions into the present context.

Consequently, when comparing findings with previous waves, it is imperative that these are understood and interpreted within the context of their own time. However each individual report ensures findings are presented in the context of the circumstances at the time of data collection. The timeline presented below highlights survey periods and those that were impacted by COVID-19 restrictions.



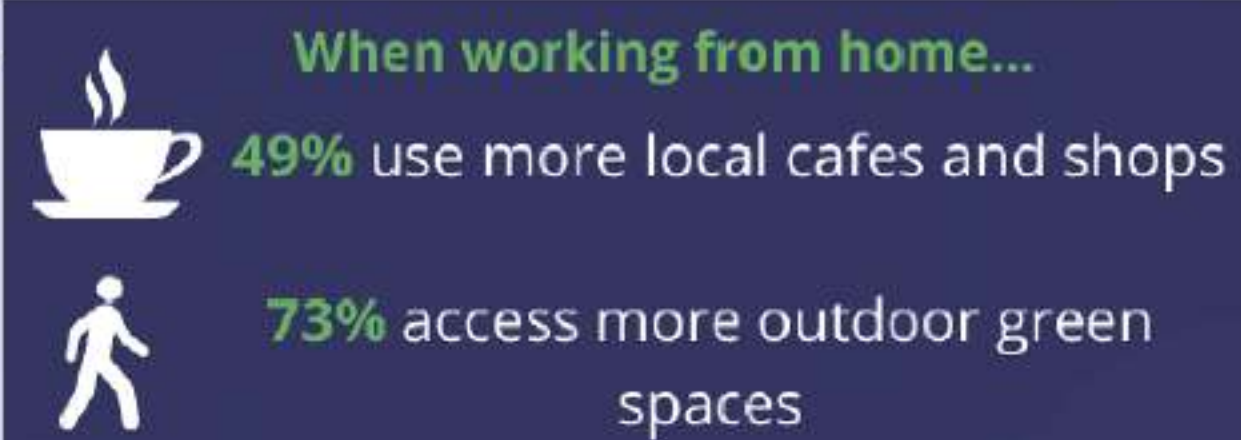
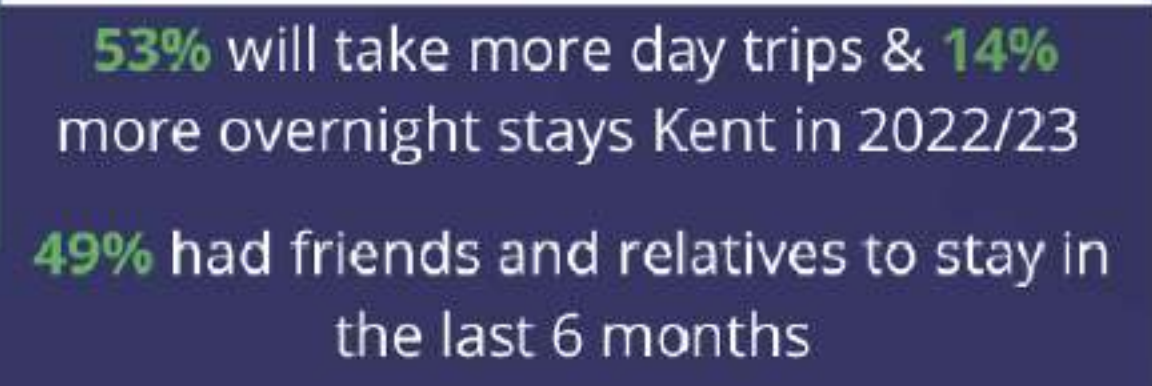
KEY FINDINGS

This report is based on findings from the sixth wave of the Residents Research, which aimed to gather valuable insights into the perceptions of Kent residents on the impacts of seasonal tourism.

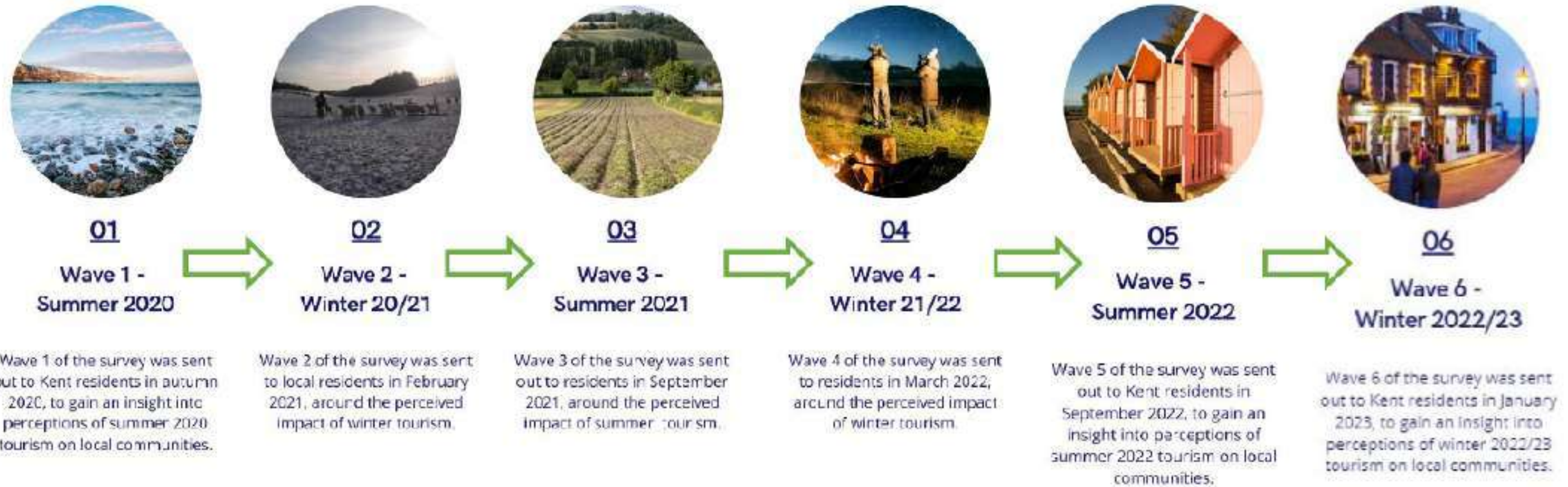


686
Kent Residents

Online Survey

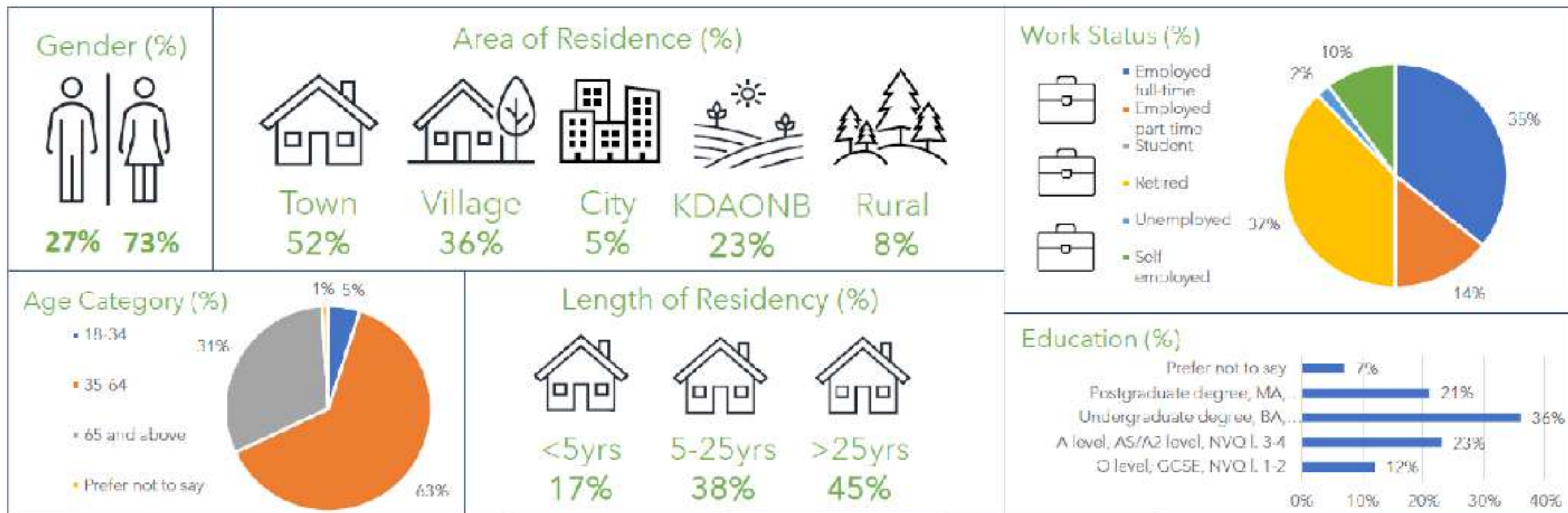


Data Collection 



Sample & demographics

- Findings show that similar to previous waves, the majority of respondents were female and those aged 35-64 years.
- Respondents most commonly stated they live in a town (52%), with 45% having lived in their area for over 25 years. The largest proportion were retired (37%), closely followed by 35% employed full-time.
- Overall, demographics mirror the previous wave, however there was a decrease in the proportion of male respondents vs. wave 5 (-15%), alongside a -12% decrease in those aged 18-34 years.





Impact of Winter Tourism

The survey was broken down into various sections, the first of which looked at the perceived impact and potential benefits of winter tourism. Firstly, residents were presented with a list of statements about the impact of tourism on their local area, and were asked to indicate how much they agreed or disagreed with each statement.

Respondents were informed that their 'local area' is defined as the city/town/village that they live in, rather than their home/place of residence. The survey also defined any references to 'tourism' as people on day trips and those coming from further away for a few days or more.

As with previous waves, responses have been combined for ease of presentation and interpretation, for example, we did this for those that selected 'strongly agree', 'agree', and 'somewhat agree', to present an overall level of agreement. However, a full list of questions and percentages for each wave was included in the appendices, which can be found at the end of the full Kent Residents Survey Wave 6 report.

- Overall, respondents were more likely to agree that tourism reduces their ability to access local services in summer, as opposed to winter. This demonstrates that due to potential overcrowding in the peak season, some residents may feel this inhibits their ability to as easily access local amenities. This sentiment also supports the need to disperse visitors to other areas in the county during busier periods, but also shows justification for potential resident initiatives, such as priority entry, discounted tickets and local campaigns such as the Kent BigWeekend.
- In support of this, respondents were more likely to agree there are too many visitors in their local area in summer as opposed to winter. However, as illustrated in the diagram, this does not represent the majority of residents and therefore for many they do not negatively perceive visitors' presence.
- In terms of prices for local services and amenities, agreement that tourism increases these was higher in summer overall, with a sharper increase in agreement seen in wave 5. Overall, around 50% or more of residents agreed with this, which may be a result of concerns related to the cost of living crisis. Therefore, it will be important to continue to incorporate free things to do and cost-effective trip options in marketing content to the hyper-local market and explore and share discounted entry options to attractions.

Agreement	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6
 Tourism reduces my ability to access local services and facilities	23%	25%	↑ 30%	↑ 25%	↓ 36%	↑ 17%
 Tourism increases prices for local services and amenities	45%	47%	↑ 52%	↑ 47%	↓ 57%	↑ 43%
 There are too many visitors in my local area	16%	22%	↑ 18%	↓ 15%	↓ 27%	↑ 10%

- Since wave 1, there has been a steady increase in agreement that local transport services are improving, however in wave 6 this saw a sharper decline. Although this sentiment may show acknowledgement of initiatives to improve transport locally, this still only represents a small proportion of residents and may reflect ongoing strike action and increases in prices. Furthermore, these results demonstrate the need to continue to improve perceptions around transport locally, by continuing to work closely with transport providers and provide and promote cost-effective ticketing.
- Perceptions around local infrastructure has seen significant improvement, particularly following wave 3. These results demonstrate that residents strongly acknowledge that tourism can be a mechanism for improving facilities. This demonstrates the need to continue to maintain this and ensure that funding continues to be reinvested into improving facilities.
- Perceptions around tourism’s ability to increase employment and improve the economy has been consistently positive throughout each wave, and are seen as key benefits of tourism activity. However, agreement in relation to job creation did see a dip in wave 2, but this is likely a result of the pandemic, with many businesses being forced to close and people on furlough, but since then this has seen improvement and demonstrates recovery of the sector.

	<u>Agreement</u>	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6
 Local transport services are improving		8%	9% ↑	13% ↑	23% ↑	36% ↑	16% ↓
 Local infrastructure is improving (e.g. public toilets, car parks, playgrounds, footpaths, cycle paths)		17%	19% ↑	20% ↑	46% ↑	54% ↑	47% ↓
 Tourism increases employment opportunities		92%	79% ↓	88% ↑	85% ↓	90% ↑	88% ↓

Overall Support of Tourism

- Results show that 87% of residents agreed that they support winter tourism in their local area, a sentiment that has been consistent across each wave regardless of season.
- Findings show that a significant proportion of residents (63%), agreed that working in the tourism and hospitality industry is an attractive career, with a strong level of agreement across each wave this was asked.
- This shows that overall working in the tourism industry is seen positively among residents, and that activity should look to continue championing working in the sector and providing quality long-term jobs for local communities.
- In wave 6, 82% of respondents stated that the overall impact of tourism on Kent is positive, with a steady level of agreement seen across all six waves.



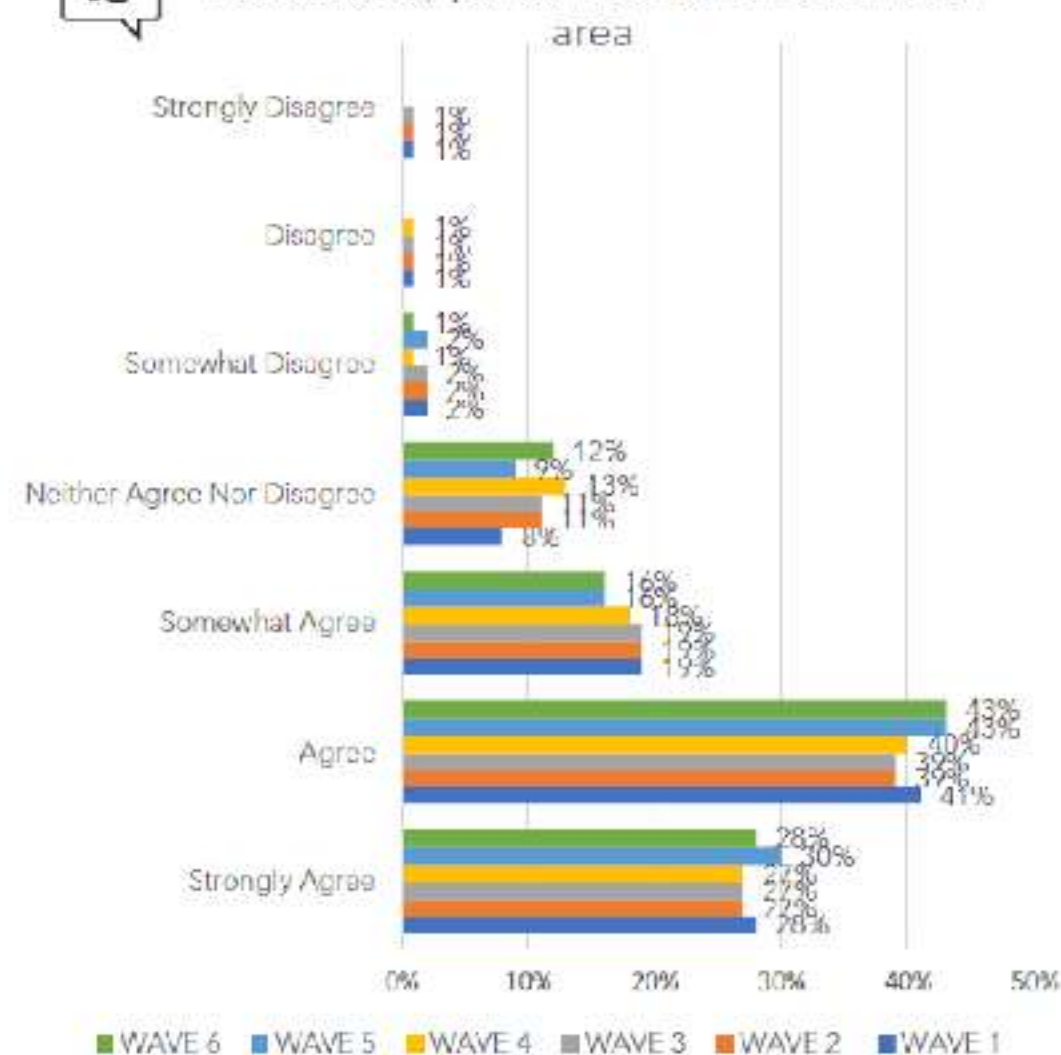
Respondents were asked to specify the top three positive and negative impacts of tourism on their local area. The word clouds below illustrate the most frequently mentioned words from wave 6, indicated by the size of the words displayed.

- Across each wave similar themes emerged, with the main positive benefits centred around the economic benefits tourism can bring to the county, alongside employment opportunities and inward investment opportunities. Other benefits included tourism helping to improve facilities and increase demand for attractions, in addition to helping keep residents' local area vibrant.
- However, in terms of negative impacts the most common issues mentioned included issues around traffic and congestion, alongside tourism's negative impact on the natural environment and local wildlife, including litter and pollution. Other concerns included lack of parking availability, overcrowding and high costs and house prices.

Overall Support

Results have consistently shown that residents have expressed a strong level of support for tourism in their local area, with the majority also agreeing that working in the tourism and hospitality industry is seen as an attractive career. Furthermore, the latter also shows that activity should continue to champion working in the sector and to strive to provide quality long term jobs for local communities in both the peak and off season.

Resident support of tourism in their local area



WPT5 CASE STUDY

EXPERIENCE DEVELOPMENT PROGRAMME SME; HIKE SOUTH EAST

What we do:

My name is John Bradshaw, and my business is called Hike South East. I am an experienced and qualified hiking guide and I lead walks through areas of outstanding natural beauty in Kent, Surrey and Sussex. I am a specialist in tailor-made hikes for individuals, groups, corporates and charity events. With stunning scenery guaranteed, I tell my walkers about the famous people that once lived here such as Winston Churchill or Ian Fleming, author of the James Bond novels, and tell my fellow walkers about the history, landscape, geology and wildlife of the area.

How we do it:

My business benefits from Kent's proximity to the southeast of London, and from the white cliffs of Dover which is only 20 miles from France. Kent is known as the 'Garden of England' and is famous for its distinctive oast houses. It contains the Kent Downs Area of Outstanding Natural Beauty, which includes the North Downs, a ridge of chalk hills running from the west to the east of the county an ideal location for walking and hiking. I offer a range of walks throughout the year in Kent, Sussex and Surrey that can be booked directly through my website.

Impact:

In 2020, I applied to be part of the Experience Development Programme run by Visit Kent. Upon being accepted onto the programme, I benefited from a series of webinars, peer review sessions and 1-2-1 consultations aimed at helping businesses. Thanks to the 1-2-1 consultations, I have changed what I am doing. I have been able to double my charges which has had an important impact on my business. I also now include homemade food based upon local Kent and Sussex recipes which has been very popular with visitors. One of the main objectives of the INTERREG EXPERIENCE project has been to extend the seasons throughout which the business could continue to operate especially into the winter. As a result of the Programme, I have now increased the number of hikes that I have done into November, December and March especially. Following the advice, I have also reduced the length of the hikes that I do which has been important in attracting more people to them who have not been out into the wilds before. The Experience project has given me the opportunity not only to work with other businesses thanks to the networking opportunities but also Visit Kent have now been able to link me in with potential partners near here such as Gravesham Borough Council with a view to offering more local hikes in North West Kent.

I have also been put in contact, thanks to the INTERREG EXPERIENCE project with tour operators TUI and InterCruises in connection with the cruise ships coming into Dover. With TUI, through their subsidiary InterCruises, they offer a variety of excursions for German cruise ships coming into Dover three times a year. In September 2022, I had a fantastic day out exploring the White Cliffs of Dover with 12 German cruise ship passengers who I picked up and took for a hike and talked about iconic authors such as Ian Fleming who wrote the novel Moonraker in St Margaret's Bay near Dover in Kent.

Our Tips:

It has been really important for me to engage with Visit Kent and the Kent Downs AONB as they can give you so much advice and contacts that can be significant to my business. Networking with other business has helped me to make new contacts



Watch the interview
here



[HTTPS://WWW.TOURISMEXPERIENCE.ORG/](https://www.tourismexperience.org/)

