

Consumer Perspectives

THE RESEARCH

Building on the cultural audit and aiming to inform the broader goals of Culture Kent, the consumer survey focused on the views of domestic consumers. The survey looked to discover the motivations, perceptions, demographics and experiences of both existing and potential cultural tourists to Kent. Findings from previous Visit Kent and VisitEngland reports were also incorporated, to enrich the context of the findings.

The survey was set to identify and examine the views of the following three groups – existing Kent cultural tourists, potential cultural tourists and existing Kent tourists.

This industry insights paper has been developed to disseminate the key findings of that research.

WIDER CONTEXT

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

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

HEADLINE FINDINGS FOR KENT

- **A higher proportion of existing Kent cultural tourists went on short breaks (51%) and mid-length holidays (21%) than existing Kent leisure tourists (43% and 14% respectively)**. Cultural tourists' tendency to spend longer in Kent may reflect an opportunity to promote a wide range of activities and places to visit. For instance, with the use of suggested and tailored routes and itineraries, and by incorporating places to stay in areas with a strong cultural offering, longer breaks could be encouraged, allowing visitors to engage with the wider destination experience.
- **Spending more time at the destination consequently means that the economic value of the visits grows**. This supports the need for actively engaging in promoting the cultural tourism offer more, further **highlighting the scope for sustained cross-sectoral collaboration**.

Image credits: Turner Contemporary - courtesy of Turner Contemporary; Pablo Bronstein, Beach Hut in the style of Nicholas Hawksmore, photo Stuart Wilson - courtesy of Creative Foundation.

The primary research that informs the findings comprised of **770 responses** gathered through an **online survey**.

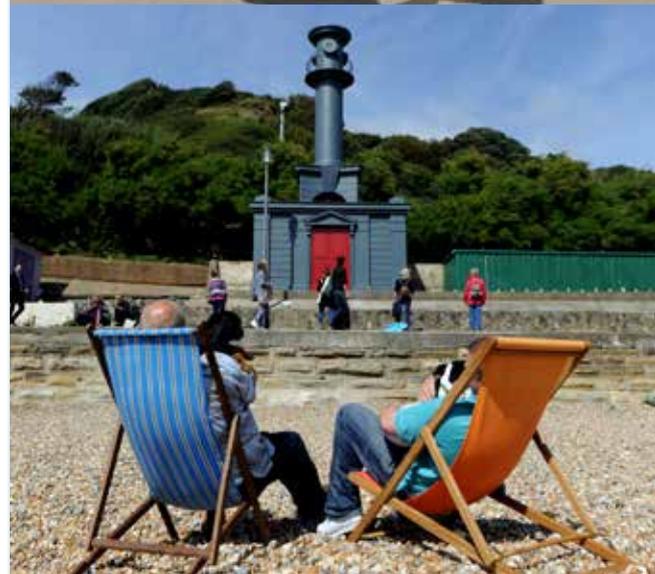
An independent **online panel** was used, to reduce bias in the sample, accessing respondents that Visit Kent/Culture Kent had not necessarily been in touch with previously.

Through **filtering quotas**, the survey was completed by visitors from London and the Home Counties.

The survey followed the views of three groups:

- **Existing Kent Cultural Tourists** – tourists primarily motivated by culture, who had visited Kent;
- **Potential Cultural Tourists** – tourists primarily motivated by culture, who had not visited Kent;
- **Existing Kent Tourists** – tourists primarily motivated by leisure, who had visited Kent.

The research was built on findings from the Audit of the Cultural Landscape.

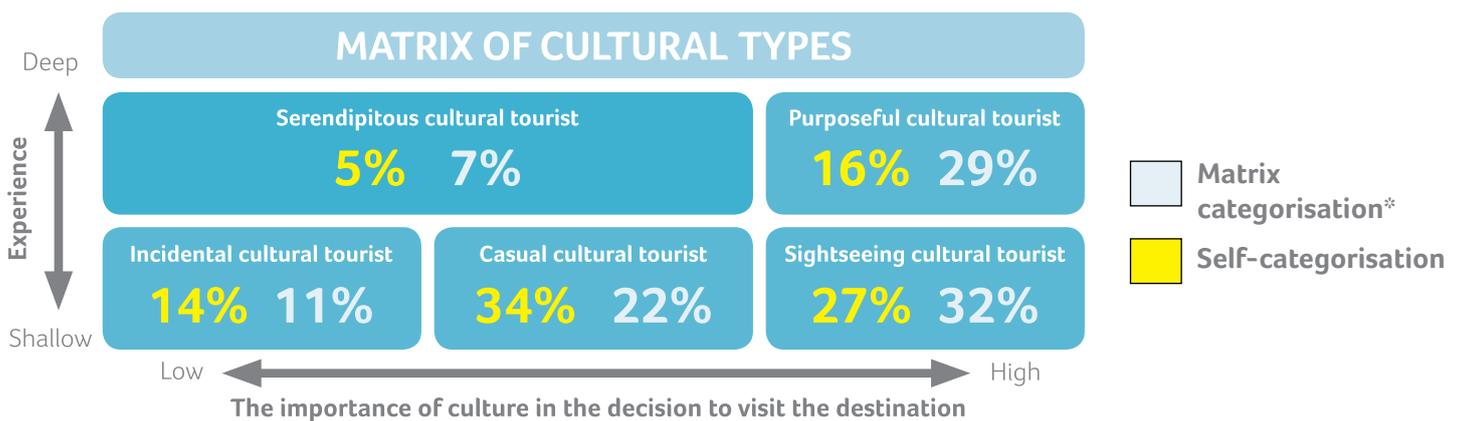


- The majority of existing Kent cultural tourists are younger than the other groups (36% were aged 25–34), which is consistent with the Kent Destination report published by VisitEngland in 2017, which shows Kent as a destination attracting a younger demographic than other GB regions.
- The cultural tourism offer in Kent is diverse and complex in the minds of tourists, with cultural activities going beyond the boundaries of venues, such as galleries and museums, into the wider destinations, which visitors classify as cultural. It shows that those **who are motivated by culture also have the desire to visit destinations that provide an attractive natural setting**, strengthening the findings of the organisational perspectives research and highlighting the need for cross-sectoral partnership working.
- The study confirmed the assumption that **cultural tourists do not make a clear distinction between culture and heritage**. For instance, looking at the existing Kent cultural tourists, most frequently cited activities included, 'visit a heritage venue' (36%), 'explore the countryside' (33%) and 'explore the coast' (29%). To reinforce the validity of this point about heritage, the raw data was re-run, filtered by cultural tourist types, which emerged from McKercher's matrix illustrated below. The new analysis showed that heritage is an important aspect of the cultural offer for both purposeful cultural tourists (41%) and sightseeing cultural tourists (38%).



Image credits: Harbour Arm Artworks- courtesy of Creative Foundation; Urban Playground, bOing! Festival, photo Manu Palomeque - courtesy of Gulbenkian.

Cultural tourist self-categorisation vs. cultural tourist types



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

A cross analysis was used to see if there are differences between how respondents categorise themselves and a combination of two answers related to the above matrix, explored in the evidence review.

- When asked if they would describe themselves as cultural tourists, only a small proportion of all respondents selected 'not at all', which indicates that regardless of their initial motivation to visit a destination, **the majority of tourists, including those motivated by leisure, will identify themselves as cultural tourists in some respect**, or will engage in cultural activities.
- Some notable differences can be seen if we look at the percentages on the matrix. Looking for instance at the case of **purposeful cultural tourists** – a smaller percentage of the sample self-identified as purposeful cultural tourists, yet when respondents were asked more indirectly about depth of experience and importance to them of the cultural offer, their responses are consistent with those of the *purposeful cultural tourist*. This shows support for the **application of the matrix as a two-dimensional analysis of cultural tourist types via a combination of centrality of culture in decision making (importance), and depth of experience sought**.

CULTURAL STATEMENTS DEFINING THE TYPES OF VISITORS IN THE MATRIX:

- **Purposeful Cultural Tourist** – Culture is often the main reason I choose a place to visit, to learn something new.
- **Sightseeing Cultural Tourist** – Culture is often a key reason I choose a destination/place to visit in order to be entertained.
- **Casual Cultural Tourist** – Culture often plays some role in my decision to choose a destination/place to visit as it can add to the experience of the place.
- **Incidental Cultural Tourist** – Culture plays no real role in my decision to choose a destination/place to visit, but when I am there, cultural activities can add to the experience of the place.
- **Serendipitous Cultural Tourist** – Culture plays no real role in my decision to choose a destination/place to visit but when I am there, I often seek interesting cultural experiences.

- **Offers and promotions** still play a big role in attracting visitors, especially sightseeing and casual cultural tourists. Yet, it appears that purposeful cultural tourists draw their inspiration from travel guide websites, highlighting an opportunity for organisations to target platforms such as Lonely Planet, Rough Guide and blogs as a means to inspire visitors seeking a meaningful cultural experience.

OTHER STUDIES

- **Positive shifts in perceptions** compared to previous studies* can be seen. 54% of respondents associated Kent with being ‘cultural’. Looking at previous studies, there has been an increase in the percentage of those who associate Kent with cultural aspects. For example, in the 2012 Visit Kent perception research, 23% of the respondents strongly associated Kent with ‘cultural events, the arts and festivals’, alongside 20% of respondents associating Kent with ‘cultural events and festivals’ later in the 2015 Visit Kent Conversion Research. Furthermore, in a recent Kent Destination Report published by VisitEngland in 2017, results highlighted that 36% of respondents associated Kent with ‘Arts’, **a higher percentage than of the UK average**, illustrating a further increase in respondents associating Kent with having a strong cultural offer.

*Results are not directly comparable as samples, methodologies and question types are different.

LOOKING FORWARD

Looking forward – aspects to take into account in order to attract more cultural tourists to Kent. Insights from the survey highlight:

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

Addressing these learnings requires:

- ✓ place-focused cross-sectoral working;
- ✓ effective marketing campaigns and media channels tailored according to the types of audiences we want to attract, avoiding ‘one size fits all’ approaches;
- ✓ messages tailored to appeal to specific demographics;
- ✓ opportunities to expand the promotion of the cultural offer in Kent beyond cultural and art venues to the wider destinations and the natural environment;
- ✓ stakeholders working towards common goals;
- ✓ time, people and resources.



More detailed findings and analysis can be found in the following Culture Kent Research Programme reports and resources:

- Report 3 - Consumer Perspectives
- Culture Kent Research Programme Summary of Findings Report



Research Insights: Written by Visit Kent and the Tourism and Events Research Hub, Canterbury Christ Church University as part of the Culture Kent Research Programme.

Brebeanu R, Berkeley-Cornner R, Scott J and Thomas K (June, 2017) Culture Kent Research Programme Research Insights Paper 3: Consumer Perspectives

Image credits: Leeds Castle Classical Concert- courtesy of Visit Kent; The Electrified Line (cross-track observation deck) by Gabriel Lester, photo Stuart Wilson - courtesy of Creative Foundation.

Understanding who your visitor is, their perceptions, motivations and what they respond to is a solid step towards attracting more visitors. This report highlights that cultural tourism is an interesting, powerful and economically viable market opportunity, which could re-shape Kent’s destination image. Effective cross-sectoral collaboration can inform Kent’s cultural tourism stakeholders’ decisions to establish the county as a leading cultural destination.



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