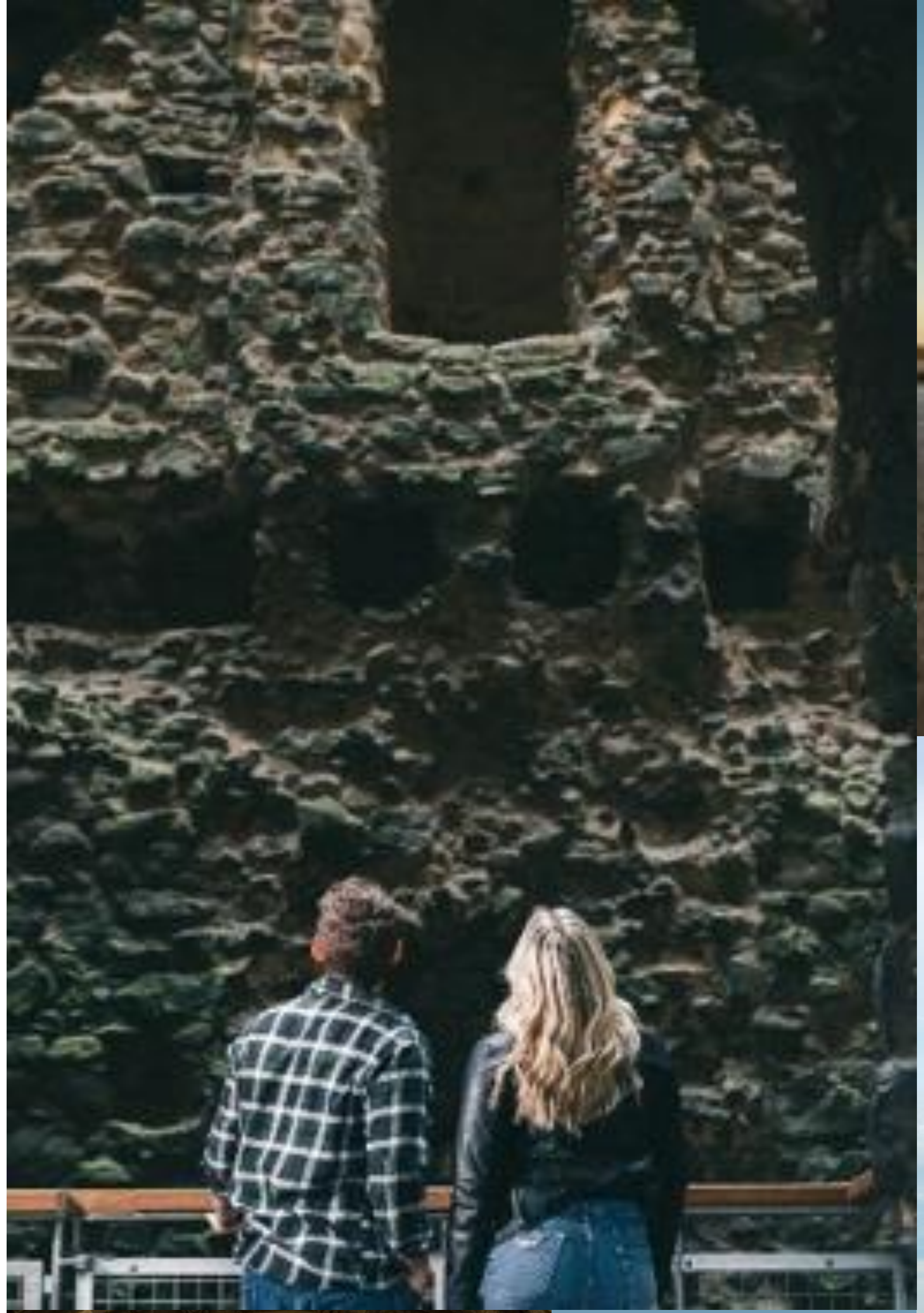
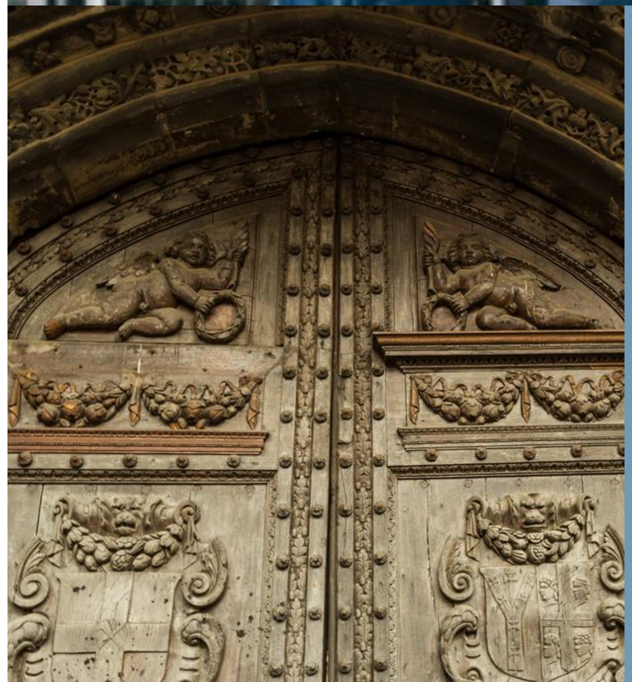
Visit Kent: Audience Segmentation

Key Audiences

January 2022




Social Contemporary Seekers

Predominantly the millennial market aged 18-35, comprising of couples and small groups of friends pre-children. Likely to be from London and the Southeast.

As the most likely audience to share their experiences on social media, decision-making and inspiration will be significantly driven by digital content, influencer activity and PPC advertising.

Accommodation choices may include unique self-catering accommodation, Airbnb, and mid-range hotels in more urban and city settings.

They look for unique experiences and can be active and adventurous. Experiences around learning and self-improvement will appeal strongly, alongside shared, creative, and cultural activities.

They also look for locally sourced produce, food festivals, street food, microbreweries, and shared space venues.

The Changing Family Dynamic

Families with children of different ages, moving away from the traditional nuclear family composition to include more intergenerational members and single-parent families, which should be reflected in messaging and marketing content.

This segment also ties in with trends around multi-family travelling, which is likely to see an increase.

They look for child-friendly activities, that are educational and hands-on. Likely to look for day trips alongside 3 nights or more, in self-catering accommodation, potentially close to nature and nearby to planned activities.

Fun-seekers – Families **l**ooking for value for money, perhaps with smaller children, and more social and value accommodation options including self-catering and caravans.

Aspirational Family Fun - Higher earning families which look for active child-friendly activities which centre around the outdoors and local culture. May also have older children and look for quality self-catering accommodation.

Green Spacers
Traditional vs. Cultural

Likely to be older couples and empty nesters.

Split by those interested more in the traditional outdoor offering and those slightly younger motivated by cultural activities alongside the outdoors.

High interest in the outdoors and local heritage, are active and look for attractions such as parks and gardens, National Trust properties and walking.

Activities such as head gardener tours, foraging, vineyard visits and local produce will appeal strongly.

Although they can go for the more luxury end, they will also be conscious of wanting to get value for money and added elements.

This segment will also be the most conscious of safety following the pandemic and therefore will be cautious and increasing confidence and instilling a sense of reassurance will be essential.

Hyper Local

This includes residents and the VFR market

Likely to be for a day trip or short break

Messaging should be centred around rediscovering local hidden gems and to discover places that they may not have known existed and supporting local businesses.

Likely to look for unique and one-off accommodation options, including tree houses, cosy cabin lodges and shepherd's huts close to nature.

01 Social Contemporary Seekers

18-34 years

Buzzseekers

Predominantly the millennial market comprising of couples and small groups of friends pre-children

Likely to be from London and the Southeast, with 25% originating from London

- Most likely audience to share their experiences on social media, decision-making and inspiration will be significantly driven by digital content, influencer activity and PPC advertising
- Care about the image they portray to others & seek out new experiences and enjoy exclusive or luxury experiences that others might find unaffordable
- Accommodation is a significant influencer and Accommodation choices may include unique self-catering accommodation, Airbnb, and mid-range hotels in more urban and city settings
- Most likely to visit during the summer months
- Most likely segment to travel via public transport
- They favor city or large towns, and dog friendly options are important

- They look for unique experiences and can be active and adventurous
- Experiences around learning and self-improvement will appeal strongly, alongside shared, creative, and cultural activities
- They also look for locally sourced produce, food festivals, street food, microbreweries, and shared space venues
- Shopping opportunities are also important to this segment, alongside events and festivals
- In terms of inspiration, they are attracted to the exciting & unexpected, food & drink, wellbeing and active and outdoors
- Experiences may include, glamping, eco hot tubs, spas, electric bike hire, wellbeing in nature and escape rooms and trails
- Other activities of interest may include wildlife experiences, vineyard tours, brewery tours, create your own gin, foraging and sustainable rural retreats
- For some, this segment may also include younger children and therefore activities will need to be adapted to cater for this, while still tapping into this segments key motivations and travel preferences

02 The Changing Family Dynamic

Families

Families with children of different ages, including more intergenerational members and single-parent families

Families with children of different ages, moving away from the traditional nuclear family composition to include more intergenerational members and single-parent families, which should be reflected in messaging and marketing content

- This segment also ties in with trends around multi-family travelling, which is likely to see an increase
- They look for child-friendly activities, that are educational and hands-on
- Likely to look for family-friendly accommodation options, such as self-catering options close to nature and nearby to planned activities
- This segment is more likely to visit Kent in the future for a longer break of 8 nights or more, although this may also include day and shorter breaks

This segment is split by those with older and younger children

- *Fun-seekers* – Families looking for value for money, perhaps with smaller children, and more social and value accommodation options including self-catering and caravans
- This may also include those within the Social Contemporary Seekers that have younger children that may be visiting friends and relatives, that look for activities and attractions such as events, zoos and wildlife experiences
- *Aspirational Family Fun* - Higher earning families which look for active child-friendly activities which centre around the outdoors and local culture. May also have older children and look for quality self-catering accommodation
- Those visiting with older children are more likely to seek out specific information from destination or attraction websites

03 Green Spacers

Older Couples

Explorers -Traditional

Adventurers – Cultural

Older couples of different ages, interested in the outdoors, with either more traditional or cultural experiences

Older couples travelling together, most likely segment to travel off-peak via car

- Trip likely to be for a short break of 1-4 nights or day trip
- Split into those motivated more by the traditional outdoors offering and those also looking for more cultural experiences. Both sub-groups are highly motivated by the outdoors and nature and seek out destinations including, traditional coastline, the countryside and rural coastline and mountains and hills

Cultural

Couples aged 35-54 years

- Also highly interested in the outdoors but also seek out new and cultural experiences
- They prefer holidays at a slower more relaxed pace and like to be comfortable
- They are inspired by active & outdoors and food & drink
- Experiences - river tours, wildlife reserves, vineyard tours and tasting, cider farm, Nordic walking, walking pilgrimage

Traditional

55 years and over and empty nesters, with 30% originating from the Midlands

- High interest in the outdoors and local heritage, are active and look for attractions such as parks and gardens, National Trust properties and walking and look for action
- They like to be comfortable in their travel choice and although they don't seek out luxury, they will also be conscious of wanting to get value for money and added elements
- They know the type of thing they like and tend to stick to that. This segment will also be the most conscious of safety following the pandemic and therefore will be cautious and increasing confidence and instilling a sense of reassurance will be essential
- Activities such as head gardener tours, foraging, vineyard visits and local produce will appeal strongly*
- They are highly inspired by food & drink experiences such as vineyard visits and brewery tours and, alongside history and heritage, including well-known and iconic sites and experiences such as gin steam trains

*Further information on experiences and segments can be found from page 102 of the perception research report

04 Hyper Local

Kent Residents

This includes local Kent residents and encouraging them to explore their local area for a day trip or short break

This includes local Kent residents and the VFR market

Likely to be for a day trip or short break of 1-4 nights

Messaging should be centred around rediscovering local hidden gems and to discover places that they may not have known existed and supporting local businesses

Likely to look for unique and one-off accommodation options, including tree houses, cosy cabin lodges and shepherd's huts close to nature

Day trippers to Kent that were visiting friends or relatives were more likely to live within a two-hour drive time of Kent

Insights from the Visit Kent Business Barometer show that attractions are seeing a significant proportion of their visitors from within the county, therefore supporting the hyper local segment

Findings from the Kent Residents Survey show that residents strongly support tourism activity, with 63% identifying their local area as a tourist destination. These insights therefore may indicate the appeal the county has to other residents for a short break

Results from the most recent Cambridge Model report based on 2020 data, shows that VFR visits accounted for the largest proportion of visits, which demonstrates its potential value and market opportunity

Results from the post Kent Big Weekend Survey showed that 78% of respondents would like to visit more places in the county as a result of the campaign, with 99% saying they would be proud to show their friends and family around Kent.

Additional Considerations

Visit Kent Segmentation: Key Audiences

Timings

For certain segments timings must be considered. With families, the school holidays and term dates must be acknowledged, with this segment being most likely to be able to make plans on weekends/school holidays. They are also likely to plan in advance to avoid disappointment and secure necessary accommodation and requirements.

Although the planning window hasn't changed, booking is closer to the date of departure

Older couples and empty nesters may also look for mid-week bookings, as they have more flexibility with many being retired.

The Pandemic

The older demographic will be strongly driven by safety and will need to be reassured through messaging.

Due to concerns around health, research has shown that people may look to continue to use their car as transport. Therefore, it will be important to encourage visitors and residents to use public transport. This will rely on a close working relationship with key transport providers, reassuring messaging and value for money tickets for audiences.

Reconnecting & Postponed Plans

With so many missing out on celebrating occasions and having to postpone plans, consumers will be looking to make up for lost time and reconnect and celebrate with loved ones. This means that consumers may have higher expectations when it comes to booking options and experiences on offer. Due to this, there is likely to be a demand for increased personalisation and one-off experiences to mark these special milestones, with people wanting to create lastly memories.

Other Insights

Trends insights also highlight that consumers will continue to seek out the outdoors and activities and accommodation options that are close to nature, and many will look to take staycations as opposed to international travel.

Additional Considerations

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Visit Kent Segmentation: Key Audiences

Sources of Information

Recent visitor profile skews towards younger, relatively local people, though intent to visit in future is more evenly distributed. Online sources are vital for potential visitors seeking out information, with the top 4 sources all online.

Online search and review sites are key to the booking process and so search optimisation and good reviews for tourism businesses remain vital.

Younger people also seek out bloggers and other social media recommendations.

Review sites are used my more people than official destination or venue websites

Despite the dominance of online channels, the value of leaflets and brochures is evident, presumably among people already in the area.

Accommodation

The majority of last leisure visits to Kent were either day trips or short breaks of a couple of nights. Almost half (47%) of those living within a two-hour drive time of Kent came just for the day.

Suitable accommodation is the highest ranked decision influencer followed by the choice of things to do.

Accommodation preferences appear to be diverging with increases in both high-end hotels and rented apartments for future holidays in Kent.

Accommodation is a driving force for 1 in 4 visitors from London, who are also more likely to stay in a high-end hotel.

Satisfaction with accommodation options is high, particularly among those visiting more recently and findings show that the longer visitors stayed the higher their satisfaction was.

Profile of Visits

Day trippers to Kent for leisure were more likely to be older and live in London, the SE or East.

Day trippers to Kent that were visiting friends or relatives were more likely to live within a two-hour drive time of Kent.

Those who visited Kent for longer leisure breaks were more likely to be younger and live over 2 hours away.

People that were visiting friends or relatives for 4+ days were more likely to be younger and live over two-hour drive time of Kent.

Summer vs Off-Peak Visitors

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- **Summer dominates, but a third would visit in Spring or Autumn. Price and quietness drive reasons for visit in term time**
- **There is a slight skew towards summer visits among those coming from London.**
- **Potential visitors from the South West are a strong opportunity for the shoulder seasons, primarily because it is quieter than peak season, but also the cheaper prices. Older people and those visiting in couples, or adult groups are also good target markets for the shoulder seasons**
- **However, the difference between visitors in summer and off-peak are generally not major**

- Summer visitors ....
  - Inspired to visit Kent by the Exciting & Unexpected and the Wellbeing imagery
  - Say shopping opportunities (56% vs 49%) and Events/festivals (51% vs 44%) are important
  - The variety of activities as an influencer to visit Kent (21% rank it first)
  - More likely to consider a longer break in Kent in future (28% vs 22%), with deals more likely motivate longer visits (64%). Those who wouldn't stay longer are more likely to been on a day trip to a specific place
  - More active online using Kent destination websites (43% vs 36% and attraction websites (38% vs 32%) to seek out information
  - Booking as a package (30%)
  - Interest in the Ghost hunt tour experience (31%)
  - Walk or hike once in Kent (12% vs 7%)
  - Slightly younger (32% are 18-34 vs 27%)
  - More from London (23% vs 18%)
  - Slightly more Social Contemporary Seekers (31% vs 27%)

- Off-Peak visitors ....
  - A little more likely to be visiting friends and relatives (34% vs 29%) and therefore friends and family more likely to be the primary decision influencer (16%)
  - 55% visit alone/in a couple (45% of Summer visitors)
  - Greater interest in rural coastline (52% vs 45%) and say that clean unpolluted beaches are important (68% vs 63%)
  - Planning more day trips & short breaks in England in 2022 (52% vs 48%)
  - Say the 'know well'/'have visited' more places in Kent, in particular – Deal, Folkstone. Maidstone
  - Social media recommendations more important in informing decision (20% vs 16%)
  - Book directly with accommodation providers and activities (60%)
  - Slightly older (38% 55yrs + vs 32%)
  - More from the South East (21% vs 16%)
  - Slightly more Traditional Green Spacers(29% vs 25%)

Experience Product Testing Report

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Visit Kent Autumn/Winter Campaign: Key Audiences

Creative Experiences

Responded to advertising – Females aged 55+ and those aged 35-44 with kids

From Kent, Essex, Cambridgeshire, West Sussex, Buckinghamshire, Oxfordshire, Bedfordshire & Hampshire

Also searched for shared experiences and escape the ordinary

Engagement was seen from females and males aged 18-24, combined with outdoor activities & local history and culture

Food and Drink

Responded to advertising – Those aged 65 and over & females aged 24-34, some may have children

From Kent, Essex, West Sussex, Buckinghamshire & Bromley

Also looked for shared experiences and health and wellbeing activities & inspirational messaging performed most highly

Engagement was seen from females aged 24-34 and males aged 35-44, combined with outdoor activities & local history and culture

Escape the Ordinary

Responded to advertising – Females aged 55+, 45-54 & males aged 35-54

From Kent, Essex, East Sussex, West Sussex & Bromley

Also looked for outdoor and shared experiences

Engagement was seen from males & females aged 18-24, combined with outdoor activities & local history and culture

Health and Wellbeing

Responded to advertising - Females aged 65+, 18-24 & males aged 25-34, with no children

From Kent, Suffolk, Hertfordshire, West Sussex, Bedfordshire, Buckinghamshire, Bromley, East Sussex & Hampshire

More likely to respond to inspirational messaging & searched for this alongside history & local culture and shared experiences

Engagement was seen from males aged 35-44 and females aged 45-54, combined with outdoor activities & local history and culture

Experience Product Testing Report

VISIT KENT
BUSINESS
GARDEN of ENGLAND

Visit Kent Autumn/Winter Campaign: Key Audiences

History and Culture

Responded to advertising - Females and males aged 25-34 & females aged 65+

From Kent, East Sussex, Buckinghamshire, Bromley, Suffolk, Essex, Bedfordshire, Oxfordshire & Hampshire

Searched alongside shared experiences and health and wellbeing activities

Engagement was from males aged 35-44 and females aged 35-44 and females 65+, together with outdoor activities and food and drink

Outdoor Experiences

Responded to advertising - Females 55-65+ & males 65+ & 25-34

One of the highest incomes out of key product themes and from Kent, East, Sussex, Hertfordshire, Bedfordshire, Bromley, Essex, Suffolk, West Sussex & Buckinghamshire

Also searched for escape the ordinary and shared experiences

Engagement was seen from males aged 25-34 and females aged 35-44, together with local history and culture & food and drink

Off the Beaten Track

Responded to advertising- Females aged 45-54, 35-44 & 65+ with no children and one of the highest incomes out of key product themes

From Kent, East Sussex, Bromley, Essex, Hertfordshire, Surrey & West Sussex

They also searched for escape the ordinary and shared experiences & Inspirational messaging resonated most highly

Engagement was seen from males aged 35-44 and females aged 18-24, together with history and local culture and outdoor experiences

Shared Experiences

Responded to advertising- Females 65+, males 25-34 & females 25-34

From Kent, East Sussex, Essex, West Sussex & Bromley

They also searched for history and culture and health and wellbeing

Engagement was seen from males aged 35-44 and females aged 25-34, together with outdoor experiences and history and culture