

Canterbury Factsheet

The Experiential offer – Opportunities & Gaps

September 2020



The following factsheet will review:

- ✓ Strengths & opportunities that resonate across East Kent
- ✓ Key trends that resonate with the Canterbury, Whitstable & Herne Bay offer
- ✓ The opportunity from a sustainable tourism lead
- ✓ Building on the current product
- ✓ Canterbury, Whitstable & Herne Bay specific
 - ✓ Opportunities & examples
 - ✓ Gaps & considerations
- ✓ Opportunities offered by the NDW & Kent Downs AONB
- ✓ Experience product snapshot grid highlighting seasonal opportunities

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Key trends that resonate with the Canterbury, Whitstable & Herne Bay offer

Canterbury is one of England’s premier heritage cities, where the Cathedral has been attracting visitors for centuries to its medieval streets. However, in recent decades dwell time has receded, and as with many heritage-based destinations there is a perceived lack of urgency to visit. The city, countryside and surrounding coastal towns are brimming with potential, whether it’s learning how to prepare your favourite oyster dish or walking in the footsteps of Pilgrims on the North Downs Way – the key is turning these activities from ‘things to do’ into great ‘experiences to remember’.

Travellers are moving away of the ‘tried and tested’ tourism offer; they are now in search of unique and new experiences that will leave them feeling positively changed.

Developing engaging travel experiences is an effective way for a destination to reach and influence customers.

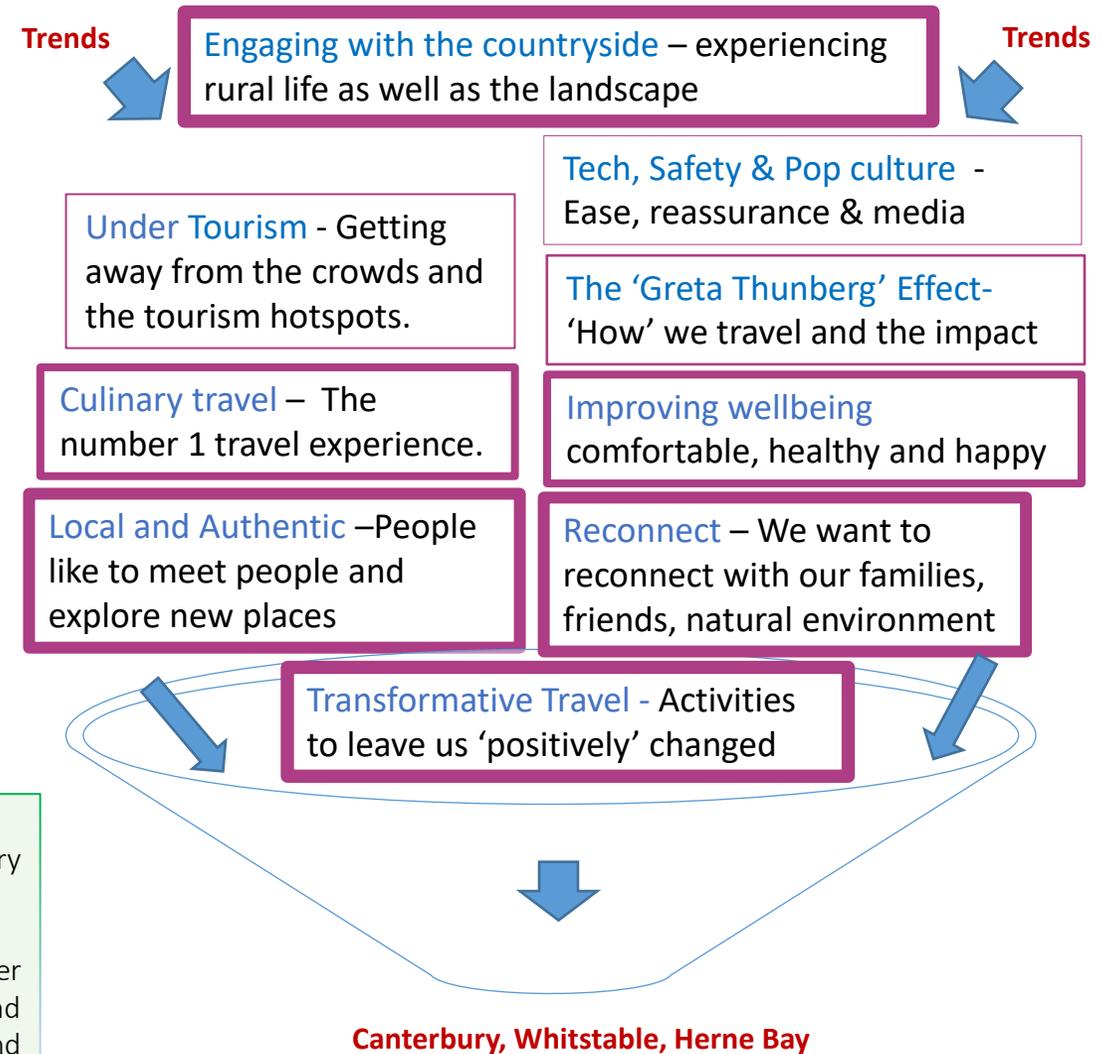
From recent research we already know that:

- ✓ **BOOK IN ADVANCE** - When booking an experience, 65% of of the domestic market book before leaving home.
- ✓ **WILL TRAVEL UP TO 1 HOUR** - Approximately 80% of customers looking to book an experience are prepared to travel up to an hour, any longer and the % drops dramatically.
- ✓ **EXPERIENCES INFLUENCE DESTINATION CHOICE** - Nearly 60% of the domestic market are influenced by an experience when selecting a destination

For Example:

At present you can attend an oyster festival for one weekend in July or you can purchase or try locally farmed oysters from a restaurant or retailer.

Experience the extra mile – Join an oyster shucking masterclass with a local ‘Ostrelier’ to learn oyster culture and hands on skills – All of the oysters will have travelled less than 2 miles to your plate, and you will leave with a new found confidence for choosing, buying, storing, shucking, cooking and pairing oysters with the correct drinks. *(at present this product doesn’t exist)*





Strengths & opportunities for East Kent and Canterbury

East Kent has an established product offer built around the coastal, heritage and countryside appeal, but it's dominated by icons. Because this recognition and recall of long-standing product such as Canterbury Cathedral & the White Cliffs is so strong, other key areas have often had to fight to be heard.

Examples of East Kent opportunities:

The Great Outdoors

- Walking and Cycling as a lead or component product.
- Getting closer to Nature- Seal watching to fossils.
- Watersports - kite surfing, sand yachting, surfing
- Wellbeing, transformative and Pilgrimage

Closer to the coast – food, sport, creative, environmental

- Getting closer to Nature.
- Educational Courses

Heritage

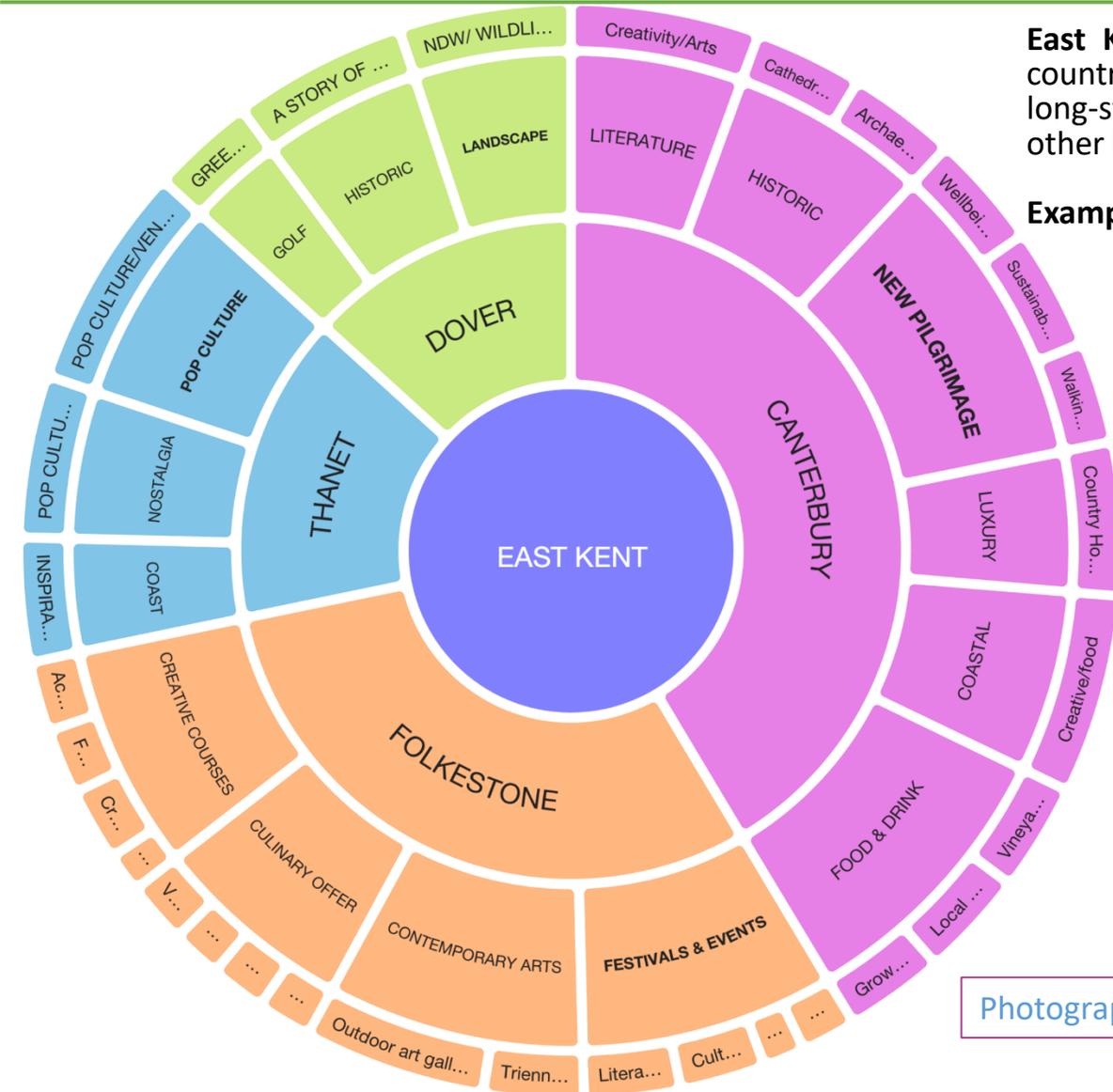
- Behind the scenes
- Off the beaten track

Seafood – engaging more with the seasons and the sea

- Catch, cook, eat, learn, care

Photography

- Stunning light/ sunsets
- Iconic coast – geological/ historical/ industrial





Building on the current product for Canterbury, Whitstable & Herne Bay

Walking and cycling – Both guided and self guided offer capitalising on the stunning countryside

The success of themed **walking tours** to extend to pilgrimage routes – focusing on the paths less taken.

Food with a back story – the authenticity and sourcing credentials of **food and drink** can set a restaurant and hotel apart

Sustainable transport as a bridge to new experiences - A rail journey to a vineyard or a stunning walk with a view

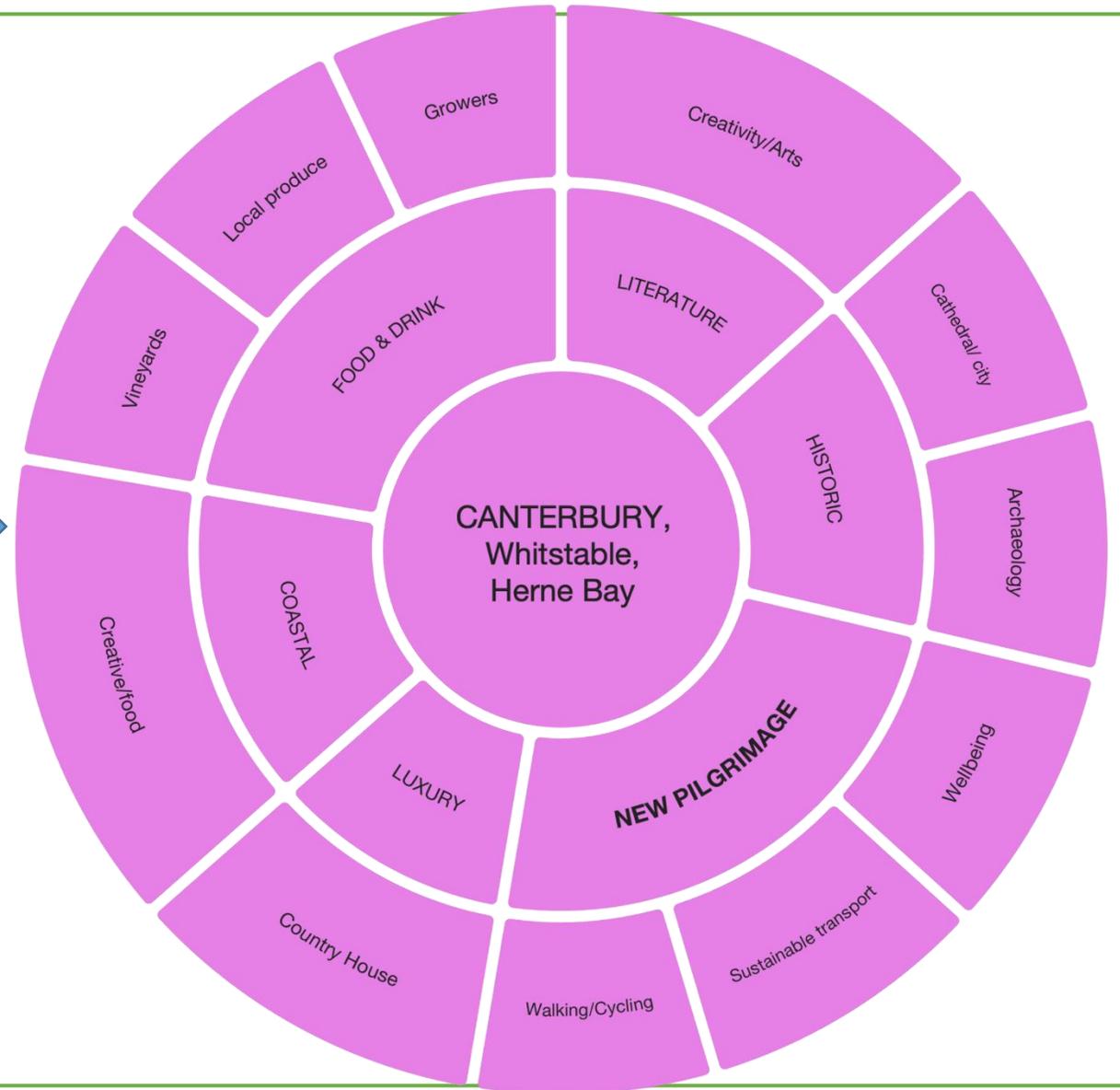
History **behind closed doors** and under your feet – behind the scenes tours of historical sites and collections as well as hands on opportunities such as dig sites.

Transformative and wellbeing focus: the **new pilgrimage** to find yourself and to reconnect using the resource of the NDW

Luxury – capitalising on the growth luxury accommodation and the wedding/ business extender market

Creative inspiration – creative arts courses and behind the scenes that are inspired by the heritage, coast, landscape & community

Strengthened and enhanced via a sustainable commitment





Canterbury, Whitstable & Herne Bay experience product opportunities

Canterbury, Whitstable, Herne Bay

Product Strengths: Cathedral, City Centre, boat/ punts, Theatre, Literature, Events, coastal food, beaches, towns.

Experience	Lead Opportunity underutilised at present	Product example
Transformative travel – Pilgrimage, walk/ cycle	<p>Walking & cycling routes are under-utilised by visitors; These could be developed by offering experience-led walks/ cycle routes with a guide.</p> <p>There is an opportunity around modern day pilgrimage, capitalising on the growth in wellness and mindfulness travel, to date messaging around the concept of pilgrimage in Kent has been spiritual and focused on multiple days of intense walking. In order to engage with a new audience ‘pilgrimage tasters’ combining a guided walk with food & drink targeting those who are looking for a transformative experience. ... but don’t have the time to complete the whole route.</p>	<p>Airbnb experiences on the SW coast path.</p> <p>Packaging sections of the Camino de Santiago for a variety of travellers.</p>
Sustainable food Seafood – Oysters Veg/ vegan offer Local growers Bushcraft & Wild Cooking	<p>Although the city experience is dominated by the cathedral, almost hidden from view to most visitors there has been a significant growth in artisan food providers championing the ‘Seasonal, Traceable, Sustainable’ food movement – e.g. The Goods Shed</p> <p>This sits well alongside cooking school products like Pashley Cake Emporium and the Canterbury baking school. Local growers such as Walmstone Growers Ltd, originally set up by the Aspinall Foundation to supply the Zoo parks, now produces top quality veg for 5* hotels.</p> <p>Bushcraft/ wild cooking is also on the rise – new local product like @bangersandballs, Jack Raven bushcraft and Natural Pathways provide forage & cooking courses which would be ideal to develop as a year-round experience product.</p> <p>Wild dining takes catering into the wild to create a unique experience, often showcasing local/ wild foods to a 5 star standard.</p>	<p>Wild Dining –</p> <p>@Amanda_Farnese_Heath is renowned for offering dining pop ups that are sustainably and seasonally sourced.</p>
Luxury	<p>Over the past 5 years rural Canterbury has seen a rise in its luxury proposition – Accommodation providers like The Cave and The Pig, development at Godmersham Park and rural hotels like Broom Park and Howfield Manor -all position the area to offer a wider luxury experience from Art/ Food/ Wine tours etc... Other notable properties are Goodnestone Park and Charlton Park.</p>	<p>www.barnsleyhouse.com Once the private home of garden designer, Rosemary Verey, now a boutique hotel.</p>
Archaeology & Restoration	<p>There is a cross over here with Dover and potential for an operator to offer dig opportunities in more than 1 site, possibly linking the Roman Museum and the Canterbury archaeological trust.</p> <p>First-hand restoration experience is also popular, projects such as the restoration of the Gamelock, a historic ship based in Whitstable could capitalise on opening to the public.</p>	<p>www.digventures.com</p> <p>Public access during the painted ceiling restoration at Greenwich Naval College.</p>



Product Priorities – Gaps & considerations

	Primary Themes	Gaps analysis for selected themes
Canterbury	Sustainable Tourism	<p>2019 saw wellness, sustainability and responsible tourism all emerge as growth trends to counter-balance over-tourism.</p> <p>The visitor wants to be greener, be more selective in the way they travel and know the back story on everything, especially where their food has come from. Driven by the millennials segment, there isn't so much a fear of missing out (FOMO) but a joy of missing out (JOMO), if that means their final travel impact is reduced.</p> <p>Although Eco/ green/ sustainable tourism appeals to the visitor, the key is to integrate it across the entire destination. If this is to become a key strength for Canterbury, Herne Bay and Whitstable, commitment from both the public and private sector needs to be woven into the destination pitch.</p> <p>This will help reposition the destination to a new younger audience base, and if actioned effectively, could be used to win over a new consumer base to visit out of season, to explore the wider area.</p> <p>The millennial audience is savvy, and will see beyond stickers and seals of approval. Delivering against the sustainability filter will require both establishing business leaders and passionate start-ups to take a 'Sustainable' ambassador role for the area. This will create a ripple effect encouraging more businesses to commit to a sustainable step change.</p> <p>For consideration:</p> <ul style="list-style-type: none"> • Utilising all available methods of transport; increased use of public transport, train travel and bike hire facilities. • Capitalising on how Pilgrimage could be repositioned to a wider audience under a transformative banner are all opportunities. • Taking a sustainable approach as a lead theme would need to be consumer tested, in order to dial up or dial down the positioning of the message when communicating to set segments. <p><i>E.g.</i> As highlighted in the main report, The Gen Z audience position 'sustainability' high on their destination selection criteria, whereas the older repeat visitor market, may view the sustainable credentials as a final decision making criteria.</p> <p>Please note: A dedicated factsheet for Pilgrimage will be supplied by the Kent Down AONB</p>

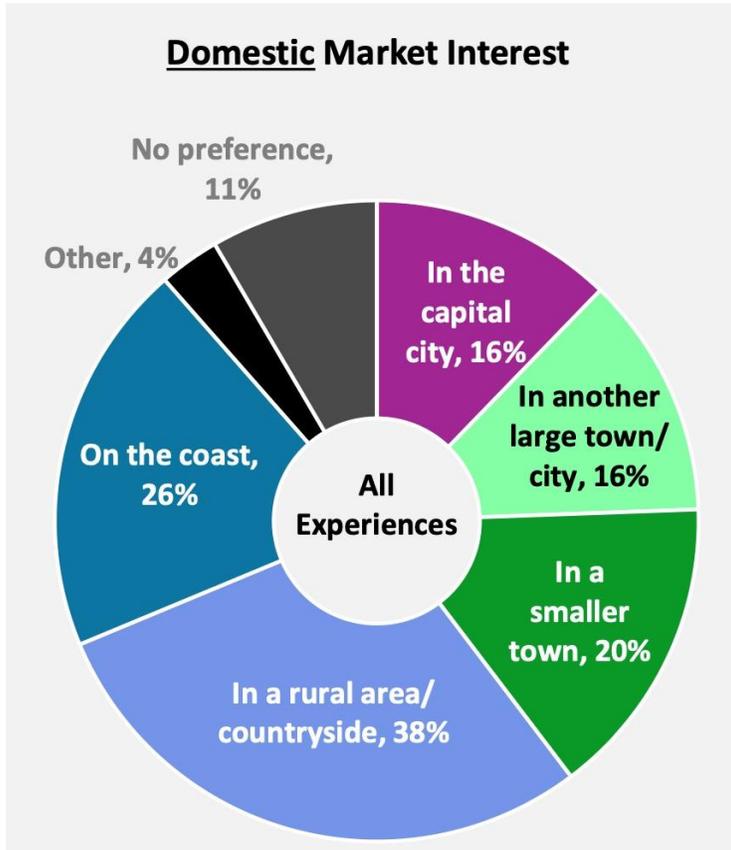


Taking a sustainable approach

The Value of the North Downs Product

Rural assets are often underutilised when they are in close proximity to heritage attractions/ city experiences.... The consumer/ group tour operator focuses their visit on the iconic attractions which often leads to the dilemma of high footfall and low spend which isn't sustainable.

There is an opportunity for Canterbury to capitalise on the strong heritage association of the Pilgrims Way to develop walking and cycling experiences which align to the rapid growth trend for Transformative tourism.



- ❖ The Discover England Experiences research (June 2019) highlights the potential to develop product in the rural area, capturing the following insights for shaping new experiences:
- ❖ There is a high interest in engaging with a rural product for the domestic audience with 39% stating their preference for the countryside, rural area. International preference was less, however is still represented 29%.
- ❖ Both Domestic and International visitors highlighted journey time to an experience was a factor with 85% willing to travel up to 1 hour, any longer saw a dramatic drop.

They want the experience to be:

- ✓ Authentic & Unique
- ✓ Create a distinctive memory
- ✓ Deliver cultural or historical immersion
- ✓ Provide a challenge that they don't have access to at home

The North Downs Way & Kent Downs AONB deliver against all these consumer requirements. Accessible in less than 30 minutes journey time; offering an authentic rural and historical experience that complements the city offer and encourages extension of stay.

The Canterbury Challenge

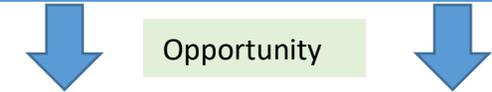
- High volume day visitor market with low spend
- 9% of staying visitors account for 40% of overall spend
- Visitors are generally older; travelling from SE & London

Canterbury needs its visitors to:

- Stay longer & spend more
- Disperse from the city centre pressure points
- Visit out of core season

Tapping into current trends

- Transformative & wellbeing experiences are a growth area
- Under tourism – visitors wanting to get away from the hot spots
- Sustainability appeal for Gen Z re transport in-destination



The added value of the North Downs:

- Pilgrims Way/ North Downs Way is an established product
- Adaptation of the pilgrimage product could reposition the route as a transformative experience as part of a Canterbury visit.
- Accessibility via public transport; the appeal of engaging with rural life; the opportunity to link rural based attractions with the walking route e.g. vineyards
- This product can be self guided or guide led
- This product delivers across the full sustainable filter

What makes a good walking experience?

- ✓ Landscape/ views/ architectural vistas
- ✓ historical or cultural insight often delivered as insider knowledge
- ✓ A chance to relax, unwind and recharge – linking to the well-being and mindfulness trend.

Engaging the visitor with the landscape

Experience products: E.g. Food & Drink – Hidden Heritage – Literary – Agricultural Tours – Pilgrimage – Wellness

How do visitors engage with outdoor activities?

85% of visitors that want to engage with the countryside are casual walkers

Casual/ leisure walker

Casual / moderate walker / cyclist with limited time

Long distance walker/ hiker/cyclist

Engaging with the North Downs Way/ AONB Walking / Cycling/Nature

Local Day visitor
Leisure walker/ group tour
Families
outdoor activity is not the main reason for travel
Local/ Domestic/ group international
Product; 1-2 hours walking combined with other attractions - often circular routes to car park with other products
Barriers: Concern about getting lost, accessing the countryside, weather

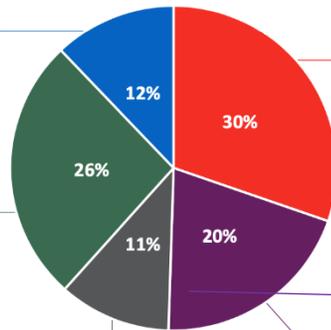
1-2 day options combined with other product
Repeat visitor
Walking/ cycling as 'part of' not main reason
Domestic 1-2 hour journey time/ rural retreaters/ active
Product: 1/2 day - 2 days - regular walkers, time poor -mid -higher range accommodation/ Unique Airbnb/ looking to combine other experiences
Barriers: Time, need to relax, competition from other activities, weather

Solo traveller/ couples/groups
Hikers / mountain biker/ route cyclist
Trail collectors
Domestic & International
Product - self guided/ looking for planning and local knowledge assistance to assist own planning - camping, Airbnb ,B&B
Barriers: appeal of other trails, baggage carrying service/ lack of

Who are the lead segments?

The countryside appeals across all VisitEngland segments, due to Canterbury's iconic status all segments would engage, however the best prospects to extend a city visit to a wider rural experience are 1&2.

1. COUNTRY-LOVING TRADITIONALISTS
2. FUN IN THE SUN
3. FUSS-FREE VALUE SEEKERS
4. FREE AND EASY MINI-BREAKERS
5. ASPIRATIONAL FAMILY FUN

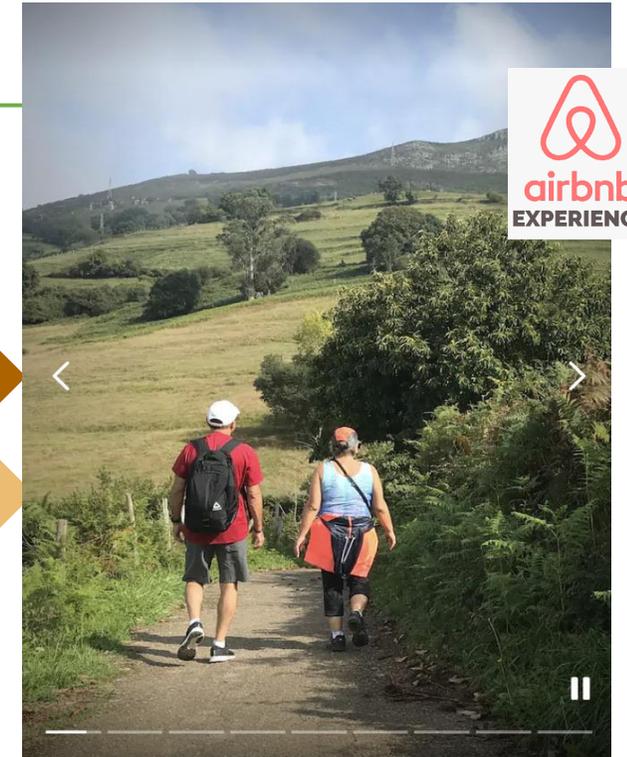


1. COUNTRY-LOVING TRADITIONALISTS

Empty nesters with traditional values, they are likely to have recently taken a countryside break in England. Good quality, secure accommodation is a priority when booking a holiday.

2. FUN IN THE SUN

Typically parents looking for family-orientated summer holidays where beaches play a starring role. Tend to seek cheaper, more 'social' alternatives to hotel accommodation, such as caravans or holiday camps.



A Taste of the Camino de Santiago

From £68 / person

Show dates

Pilgrimage route taster packages, are increasingly being offered at key stages on the Camino. Short sections (8-12km) with a guide, with a light lunch for the 'time-poor' visitor.



Appendix 1: The Sustainable Tourism cross check

For a sustainable tourism proposition to be authentic and believable, it has to be woven into the framework of the destination proposition, across environmental, economic, cultural and community.

The dial below is an effective check list for experience produce development:



Experiential tourism is often developed within the local community, capitalising on the current heritage & cultural appeal.

Both extension of current product and the development of new product needs to be cross checked against a sustainability filter to maintain its authenticity.

		Sustainability filter			
Product	Experience	Culture	Economic	Community	Environment
Examples					
Established/ Hero	City Heritage <ul style="list-style-type: none"> Cathedral walking tours Rural Heritage <ul style="list-style-type: none"> North Downs & National Trail Modern Pilgrimage Coastal <ul style="list-style-type: none"> Seafood Cultural offer <ul style="list-style-type: none"> Literature 				
Hidden Gem	Coastal Art galleries Canoeing, Baking, Foraging Luxury Breaks				
Niche	Fossil Hunting Archaeology Spiritual Pilgrimage				
New	Transformative pilgrimage Cycle hire with guide Wine & walking tours				

Appendix 2

Kent/Lead District Snapshot - Strength, Opportunity and Gap analysis

– Experience led product only

Please note: This is not a definitive list of the county's tourism product, each district factsheet will have a more in-depth product snapshot.

Strength (S) – The product is already established but could be more experiential/ season lengthened

Opportunity (O) – There is an opportunity to develop this product to raise the profile of the area through experience

Gap for development (G) – There is a consumer interest and potential for the destination to showcase this product

Seasonality Key for product delivery (Actual and Potential)

High	Potential for high product delivery in this quarter – This product may not be currently delivering in this month
Med	Potential for Medium level product delivery in this quarter due to - weather, product, availability of local support
Low	Low product delivery in this quarter due to – Reliance on weather, volunteer base, product availability

Product Grid	Kent (All)	Kent Downs AONB	White Cliffs Country NDW/AONB	Folkestone & Hythe District	Canterbury NDW/ AONB	Thanet	Ashford NDW/AONB	Tun Wells	Gravesham NDW/AONB	Medway	Seasonality				
											Jan - Mar	Apr - June	July - Sept	Oct - Dec	
Golf	O		S/O	O			O								
Hidden Heritage	S	S/O	O	O/S	S/O	O	S	S	S/O	S/O					
Archaeology	O		O/G		O/G					O					
Gardens/ Gardening Courses	S/O	O		O			O	S	O						
Fossil Hunting	O		O	O/S	O	O									
Military heritage	O		S	S			O		S/O	S					

Product Grid	Kent (All)	Kent Downs AONB	White Cliffs NDW/AONB	Folkestone & Hythe District	Canterbury NDW/ AONB	Thanet	Ashford NDW/AONB	Tun Wells	Gravesham NDW/AONB	Medway	Seasonality			
											Jan - Mar	Apr - June	July - Sept	Oct - Dec
Wildlife	O	S	S/O	S/O	S/O	O	O	O	O	O				
Walking & Cycling	S/O	S	O/G	O/G	O/G	O	S/O	O/G	O/G	O/G				
Water sports	O	O	O	O	O	O								
Food & Drink	S	S/O	O	S/O	S	O	S/O	O	O/G	O				
Multicultural	O	G	O	O	O	O	O		S/O	O				
Foraging	O	S/O	O	O	O	O	O	O	O					
Pilgrimage	O	S/O	S/O		S/O		O		O	O				
Photography	O/G	S/O	O/G	O/G	O/G	O/G	O	O	O	O				
Agriculture		S/O	S/O	S/O	S/O	O	S	S	O					
Vineyards	S/O	O	O	O	O		S	O	O					
Theatre/ Music	O		O	S/O	S/O	S/O		S/O		O				
Creative courses	O	O	O	S/O/G	O	S/O/G	O	O	O	O				

Product Grid	Kent (All)	Kent Downs AONB	White Cliffs Country NDW/AONB	Folkestone & Hythe District	Canterbury NDW/ AONB	Thanet	Ashford NDW/AONB	Tun Wells	Gravesham NDW/AONB	Medway	Seasonality			
											Jan - Mar	Apr - June	July - Sept	Oct - Dec
Art tours	O			S/O/G		O				O				
Lux escapes	O			S/O	O		O	O						
Wellbeing	O	S/O	O	O	O	O	O	S/O	O	O				
Maritime	S/O		O	O	O				S	S				
Seafood	O		O	S/O	O	O								
Outdoor pursuits			O	O/S	O	S/O								
Events	S/O		O	S/O	S/O	S/O/G	O	O	O	S/O				
Markets	O				O		O	O	O	O				
Retro culture	O		O	O	O	S				O				
Pop Culture	O			O		O			O	O				
Screen tours	O		O	O	O/G	O/G	O			S/O				
Fishing	O		O	O	O	O								
Cooking	O	O	O	S/O	O	O	S/O	O	O	O				
Family/ small group focus			O	O	S/O	S	O	O	O	O				
Bespoke tours	S	O	O	O	O	O	O	O	O	O				

This research report has been produced by

SW Consulting

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Conducted as part of the Interreg Channel Experience Project and co-financed by the European Regional Development Fund.



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