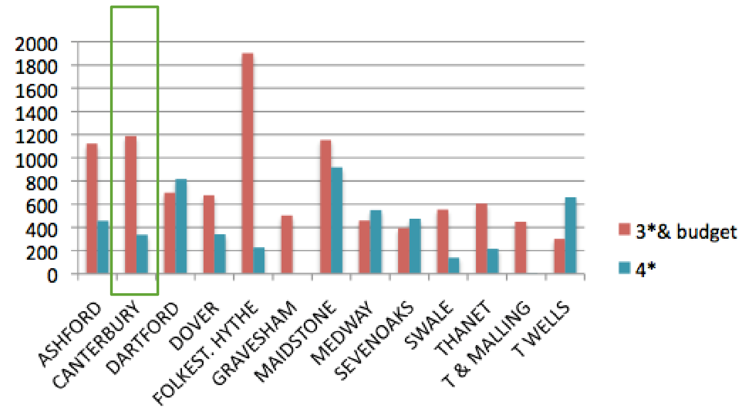
5.2a. District Dashboard Canterbury

Canterbury district is Kent's biggest hitter for both business and holiday nights, attracting close to 20% of both – significantly ahead of Folkestone & Hythe, which is in second position for holiday bed-nights at 11.3% of total for Kent, and Maidstone, which is second for business bed-nights at 12%. Canterbury district's pre-eminence is not, however, reflected in its 3* and 4* hotel provision, nor in its MICE capacity – it is in the bottom 50% for the county in terms both of number of MICE-ready establishments, and total MICE capacity. Although growth has been relatively moderate, Airbnb provision is the highest in the county, with a predominance of entire home rentals concentrated around the city of Canterbury and along the coastal area of Whitstable and Herne Bay. The **rental demand** metric is, however, moderate.



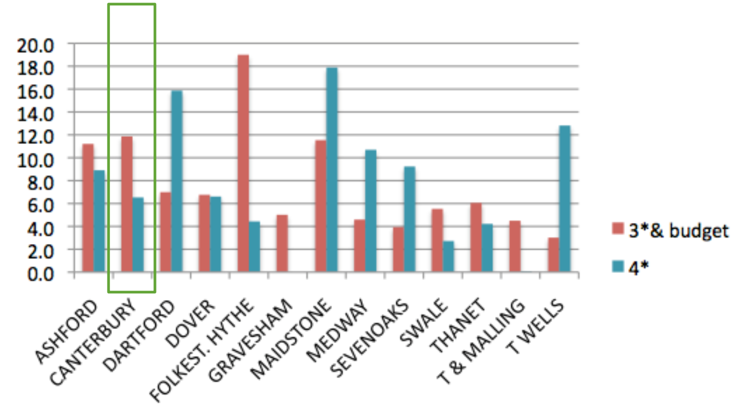
3* and 4* bed distribution by district

1/13 for **BUSINESS NIGHTS**: 485,000 bed-nights = 19.4% of total for Kent
1/13 for **HOLIDAY NIGHTS**: 1,411,000 bed-nights = 17.5% of total for Kent

8 **MICE-ready** accommodation establishments = 7.5% of county total
Total **MICE capacity**: 870 = 5.4% of county capacity within accommodation establishments
Largest single MICE venue capacity: 250

Group tour-ready establishments: 8 = 8.7% of Kent total

Airbnb: 1,263 **ACTIVE RENTALS** with a **rental growth** of **278%** between 2016 (Q2) and 2019 (Q2). **Rental demand** 72 (joint 8th /13)



3* and 4* bed nos by district as percentage of county total

Sources of data for district dashboards: Extrapolated from Destination Research 2018, Visit Kent Business Barometers, CCCU Accommodation Database audit and Airdna webpages (subscription to district level data).

5.2b. Canterbury (interview findings)

Visitor Offer

Comprising the historic city of Canterbury, the coastal area around Whitstable and Herne Bay, and parts of the Kent Downs AONB, Canterbury has a wide-ranging offer with heritage, landscape and culture at its core. In addition to its status as a World Heritage Site, Canterbury district has a growing arts and cultural festival scene.

Key Drivers for the Visitor Economy

The Universities constitute the main drivers feeding into the Canterbury visitor economy, impacting on it in three main ways:

- As major land and property owners in the city, with their own estate master plans
- As an important source of VFR
- The student population of roughly 40,000 makes an important contribution to the visitor economy, both as consumers, and as a workforce.

However, data from the *England's Heritage Cities* partnership indicate that growth in Canterbury is relatively slow, compared with benchmark cities such as Bath and York.

The climate change agenda, together with the impact of COVID on travel, are both expected to provide impetus for a growing staycation trend. The implications of this for the type and quality of hotel accommodation are unclear, as the spending of domestic visitors is generally significantly behind that of international visitors, who have traditionally been a significant element of Canterbury's market. A rise in 'well-being' breaks, healthy, active holidays and retreats, is expected to create demand in rural areas.

The shift towards home-working is likely to provide a boost to the MICE sector. The Council is seeing a high level of interest for shared office space and work hubs, which may increase demand for periodic meetings, conferences and events to bring together a more scattered workforce.

Drivers

Main:

Visitor offer – World Heritage Site, beaches, arts, culture, heritage, rural areas.
Location - proximity to London and continent. Easy access to coast.
Knowledge economy – three Universities, large student population and associated VFR.

Supplementary:

Policy – Council plans for revitalisation of city centre through more mixed-use development – moving beyond the retail offer.

Potential:

Knowledge economy – linked to Universities' growth and infrastructure development plans.

Gaps in Provision

The Council has identified a significant shortage in hotel provision, particularly around Canterbury. Demand for hotel accommodation is linked to the growth potential of the Universities; growing demand for an expanding heritage and culture offer; and the recovery of the city centre, in which tourism is expected to play a major role.

The Council is keen to encourage the development of more accommodation in any form, including MICE, and accommodation for spas/wellness breaks in rural areas.

Links to Key Planning and Policy Documents

Corporate Plan 2016-2020: will be superseded by a short term recovery plan for 2020-2022, currently in draft: https://news.canterbury.gov.uk/downloads/file/2/draft-corporate-plan-2020-2022

Local Plan: current strategy for period up to 2031 undergoing revision: https://www.canterbury.gov.uk/info/20014/planning_and_building/98/local_planning_policies

Destination Management Plan 2018-2024: incorporates data from the *England's Historic Cities* partnership: https://www.canterburybid.co.uk/wp-content/uploads/2018/10/Canterbury-Destination-Management-Plan-2018-2024-FINAL.pdf

The University Master Plans do not have statutory states, but are important documents for the District:

University of Kent Canterbury Campus Framework Master Plan: https://www.kent.ac.uk/masterplan/downloads/draft-framework-masterplan-2019.pdf

Canterbury Christ Church University campus is part of the city's World Heritage sites: https://www.canterbury.ac.uk/about-us/estate-master-plan/estate-master-plan.aspx

Priority gaps

MICE

Spa/wellness accommodation

Town centre

Support for inward investment:

Enabling environment:
The Council is willing to provide planning support on a case by case basis.