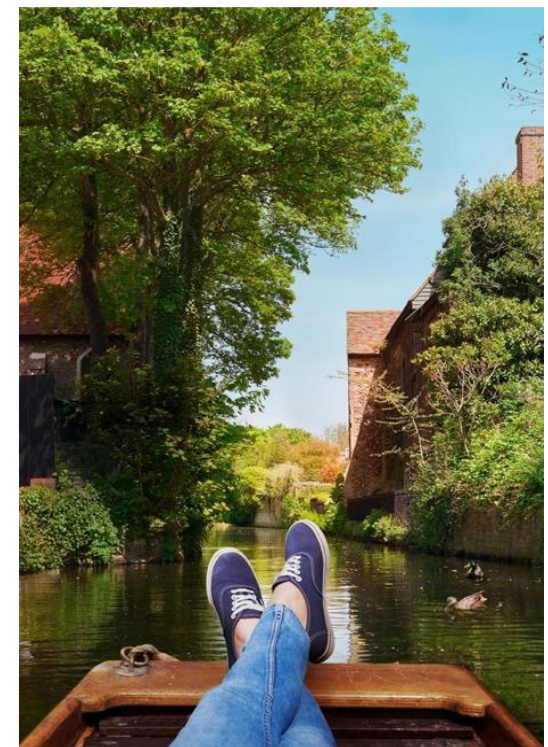


Experience Options Analysis: Mapping the Experiential Product in Kent

September 2020



Funded by:



Delivered by:

SW Consulting

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With support from:





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Mapping the experiential product in Kent

Context

Over the past 10 years, travellers have increasingly sought out 'more' from their leisure time, continually hunting for that truly local and authentic experience that separates them from the tourism hordes. Whether this is the secluded beach that no one else seems to have discovered or the best family run restaurant in the district, visitors gain an immense sense of personal achievement to have found 'the best, authentic, most unique, secret, unusual and downright bizarre'; and when they take to social media this experience becomes an almost 'badge of honour', that all who follow will want to obtain.

This consumer-led desire has given birth to platforms like Airbnb experiences; events like 'On Captain's Orders' at the National Maritime Museum and products like escape rooms, immersive theatre and trekking the South Downs with lamas.

Now, the desire for our leisure visits to be 'experience' rather than 'observation' led has become the norm. Couple this with our new-found need to reconnect to people and places driven by the current Covid-19 travel climate; experience-based travel is set to continue on its current growth curve.

Due to the size and breadth of Kent's tourism offer, the Visitor First strategy was developed as part of the previous Interreg PROFIT project; placing visitor at the heart of the brand positioning and reflecting the personalities of the North, East and West Kent areas. During this analysis, it is clear that the opportunities to develop and enhance new and current product align with this destination brand structure, as experience-led product places the customer's needs at the centre of its proposition.



The customer wants to...



Experience travel trends that resonate with the Kent offer

Leading industry surveys and go-to travel bibles have flagged the following trends that are paving the way for experience-based product development:

Transformative travel - We are now looking for travel experiences where we can learn and grow as individuals, we are still looking to create memorable moments, but we want these activities to leave us 'positively' changed. One of the oldest examples of transformative travel is pilgrimage. In its purest form it is a spiritual journey, but in today's society, pilgrimage has taken on a broader more encompassing meaning around the concept of self-discovery and reflection, with or without the final spiritual goal.

Local and authentic – This has probably been the longest standing driver for experience-led travel. People like to meet people and explore new places, so there is nothing better than to be guided by a local. This is at the very core of Airbnb's experience platform, connecting people with locals to share their homes and their passion for a place, it is also driving the recent demand for consumers wanting to explore 2nd/ 3rd cities rather than just the honeypot destinations.

Multigenerational travel, friendmoon, smaller group travel and bubble bookings - Spending quality time together with friends and loved ones has always been a driver for experiential travel. Yet due to the current repercussions of Covid-19, we are looking to reconnect with key members of our family and friends even more; this has given rise to the 'bubble booking' trend – family and friendship groups coming together across 2-3 households to travel together.

Under tourism - Getting away from the crowds was a desire before Covid-19, now this desire has just been accentuated. Consumers are increasingly looking for the alternatives, as a result, operators who focused on tourism hotspots such as Bath are now looking a little wider for the heritage offer to neighbouring Wells or Winchester. DMCs who focus on smaller groups are looking for hidden gems to incorporate on their tours, so they can give their clients more space and a sense of greater security and exclusivity. For example: Market leaders such as Abercrombie & Kent, are now offering luxury UK National Park experiences with the same attention to detail as their more traditional African safari products.

The 'Greta Thunberg' effect – Travellers are becoming increasingly aware of their impact on the planet; although this hasn't dampened the desire to travel, it has raised questions as to 'how' we travel. Recent TripAdvisor research noted an increase in the number of enquires relating to integrated train travel, also booking.com insights highlight that 76% of Gen Z's are looking to use more environmentally friendly transport once they reach their destination.





Experience travel trends

Tech & safety – Expedia research shows that on average we will visit 38 different digital platforms before we make a final booking to ensure we have found the best deal/ best experience and have chosen the right destination. The consumer is still looking for all of this, but now safety and reassurance are even more woven into the mix. Covid-19 has temporarily reduced the level of instantaneous travel (even for day trips) as many attractions do need to be booked in advance, but the ability to shape and mould our travel plans from the palm of our hands in real time is still very much a driver.

Pop culture – Whatever’s trending right now on film, TV and social media is increasingly influencing our leisure choices. Internationally acclaimed dramas such as Game of Thrones or Stranger Things have us buying retro clothing and seeking out abandoned castles in Northern Ireland. Whereas cooking programmes from Master Chef to Sugar Rush have us baking and cake decorating, pushing grocery sales up by 40% with each new series.

The audience is looking for an immersive experience that links them to their pop culture loves. Screen tourism used to focus on just visiting the actual destinations where a drama or film was shot, but now consumers want to feel like they are in it. For example: 26 million people watched Stranger Things Series 3 when it released on Netflix July 2019, on the back of this popularity there are now global conventions, themed bars and escape rooms.

Culinary travel – We are booking trips with our stomachs! Food and drink continue to be the top-ranking bookable experiences on both TripAdvisor and Airbnb. Food is inherently social and thanks to Instagram is one of the most shared holiday images, whether we’re eating it, tasting it, making it or learning about it.

In 2019, you were just as likely to see an Instagram image of an Italian statue as a plate of pasta (Forbes news) emphasising the importance for destinations to see the value of their food experience as a reason to travel rather than just a necessity.



Sources: Natural England 2019 - Monitoring of Engagement with the Natural Environment; Trip Advisor 2020 traveller Trends: 4 areas shaping the future of Travel Experiences; Skift.com – 5 areas that will shape experience travel; VisitBritain – Future Trends research. Forbes news 2020 report; Environmental Sustainability in Tourism: Key trends and business guidance. Global Wellness Institute – The global wellness Institute Tourism Economy Report Nov 2018. Competitor Monitor – Bake off boosts baking sales.



Experience travel trends

Improving wellbeing – By definition, wellbeing is – being comfortable, healthy and happy. In relation to a travel experience this can range from relaxing on a spa day, taking in the stunning views on a walk or enjoying a well-cooked meal. It is somewhat of a misconception that travellers who engage with wellness products are a small elite group.

The reality is, this segment only constitutes 11% of the market, the majority of visitors that book a wellness/ spa treatment do it as part of a wider, multiactivity stay. Product development that links to the wellness trend offers considerable opportunity, as it can be the glue that links multiple experiences together to form a short break.

Reconnect – We want to reconnect with our families and friends through shared experiences. We want to reconnect with the natural environment; over the last decade, visits to green spaces have become closer to home for shorter periods, with a noticeable shift in the last 10 years to engage more with urban green spaces rather than the countryside.

This hasn't quelled the leisure visitors desire to engage the countryside, but it has given rise to a slight anxiety of getting lost and how to deal with farm animals. As a result, there may need to be a little more hand-holding to encourage people back, emphasising the ease of access, the wellbeing benefits and safety.

We also want to reconnect with our dogs! Booking.com research highlights that 42% of pet owners around the world would choose their holiday based on whether they can take their pets... and they will pay more to do so.



'Product development that links to the wellness trend offers considerable opportunity'



Sources: Natural England 2019 - Monitoring of Engagement with the Natural Environment; Trip Advisor 2020 traveller Trends: 4 areas shaping the future of Travel Experiences; Skift.com – 5 areas that will shape experience travel; VisitBritain – Future Trends research. Forbes news 2020 report; Environmental Sustainability in Tourism: Key trends and business guidance. Global Wellness Institute – The global wellness Institute Tourism Economy Report Nov 2018. Competitor Monitor – Bake off boosts baking sales.

Where is the customer currently looking?

TripAdvisor

As the world's largest travel platform, TripAdvisor has been helping us with our travel decisions for 20 years; the platform now helps over 463 million travellers every month. In 2016/17, TripAdvisor noted that the key trend around experience travel was 'time saving', with their most popular bookable experiences incorporating a 'skip the line' or 'exclusivity' factor. Food & drink tours also saw a significant increase, along with the importance of being guided by a local. Notably for 2019, TripAdvisor highlighted that the hottest new souvenir to take back from a trip was a new skill, noting that visitors were continually looking to customise their own trips so they can immerse themselves into the local culture, with health and wellbeing showing a significant increase and the importance of feeling a connection through personal interest. Predictions for 2020 indicated that the appeal of food and drink experiences will move even further up the agenda... but it's the uniqueness of the possible experience that will influence the decision to travel, reinforcing the desire to get off the beaten track even more.

The other key trend is the rise in demand for small group bookable experiences (often family and friends). This was flagged before the impact of Covid-19 on global travel; Now the importance to reconnect with family and friends will be even more front of mind. Experience focused businesses are already changing their model to adapt, special rates for family 'bubbles', where tour providers are working in partnership with accommodation providers to cater for multiple family unit bookings in one location.

Creative courses bring an opportunity around seasonality, areas such as art, pottery, creative writing and cooking can be delivered all year round, but there is a notable increase in bookings from October to March, where consumers are looking to get their 'experience fix' during the winter. They also continually score 5 stars on the TripAdvisor platform and are often booked for gifts and special occasions. Bookable experiences can of course be found on a multitude of platforms such as Expedia, Lastminute, Groupon, DMO sites, findalocal.com and muchbetteradventures.com but these are often the more traditional tourism products and tours. Experiences that result from non-tourism sectors diversification (agriculture, sport, creative industries) are turning directly to social media rather than designated platforms, in order to create an instant relationship with visitors, so making them feel less like tourists.

Experiential Product example: *The runaway success of Secret Cinema:*

This immersive cinema experience brings people together around their love for a pop culture film, or more recently TV series. Attendees are denied access to their phones so they can fully engage with the cinematographic world and maintain an element of secrecy around the product, so fuelling its desirability. Although focused around London, the locations are often beyond zones 2- 3, in areas with little to no tourism appeal. A production can attract in excess of 120,000 people paying £50-£100 a ticket. The most recent production, 'Stranger Things' required additional dates to meet demand, running from mid-November to the end of February 2020, highlighting that experiences can drive demand regardless of seasonality.

Source: TripAdvisor product review; 2020 Traveller trends: 4 areas shaping the future of travel experiences; Experience Secret Cinema



🔍 Where is the customer currently looking?

Airbnb

In February 2019, VisitBritain launched a £500,000 campaign with Airbnb to profile the fantastic experience Britain has to offer to both domestic and international visitors. At that time there were approx. 800 experiences available on the platform. As of July 2020, there are now nearly 1400 bookable UK experiences.

Food & drink related experiences are still the most prevalent, with cooking courses to supper safaris on offer. But the most important component to a successful Airbnb experience is that they are 'one-of-a-kind' activities designed and hosted by locals.

Kent currently has 33 experiences on the platform (2% of the total UK offer) which indicates that the county has room to grow. (Fig 1.1)

Guests choose Airbnb for:

Value for money – In most destinations the offer is room rental to full house booking

Local insight – they want to feel instantly like a local, the quickest way to do this is to know one.

Neighbourhood experience/ knowledge – whether it's a village location or London zone 3, the guest is looking for instant immersion into the local community.

Airbnb Guests are valuable to the local community:

- **High average spend** – Average spend per day in the UK is £100 per head
- **High local economic return** – 43% is spent in the neighbourhood in which they are staying
- 2/3rds stay outside of tourism hot spots
- A greener way to stay - **environmental impact** is lower than the average hotel stay.
- The Airbnb offer has **opened up more remote areas** to visitors, where there is little to no hotel provision, encouraging overnight stays.

The Flip side: For a destination, the popularity of Airbnb can be a double-edged sword. Currently so many home rentals are not required to comply to the same regulations as standard B&B's or hotels and large group bookings, (pre Covid) have been known to cause disruptions. There are also sensitivities around hotspots and city centres where concentrations of Airbnb properties restricting purchasing options for the locals. However, the recently added category of 'Airbnb plus' offers additional reassurance to both the guest and residential community.

% distribution of current Airbnb Experience product in the UK (July 2020 - approx 1400 experiences)

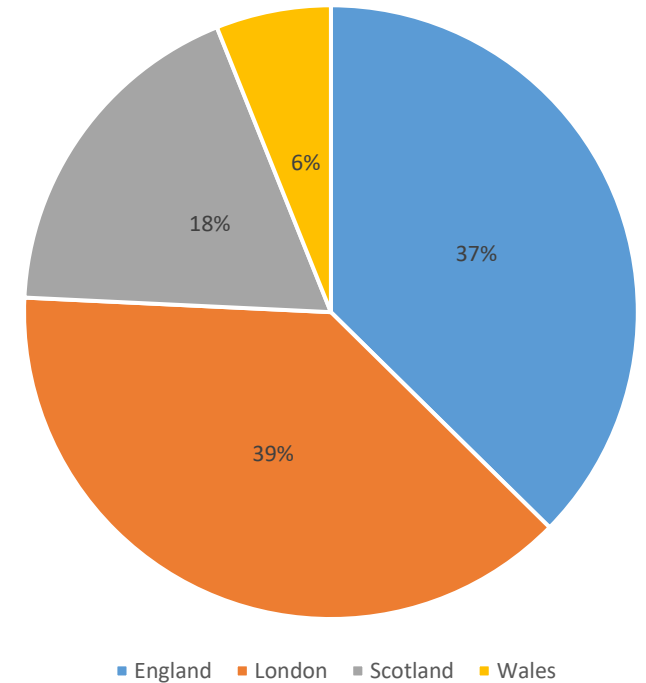


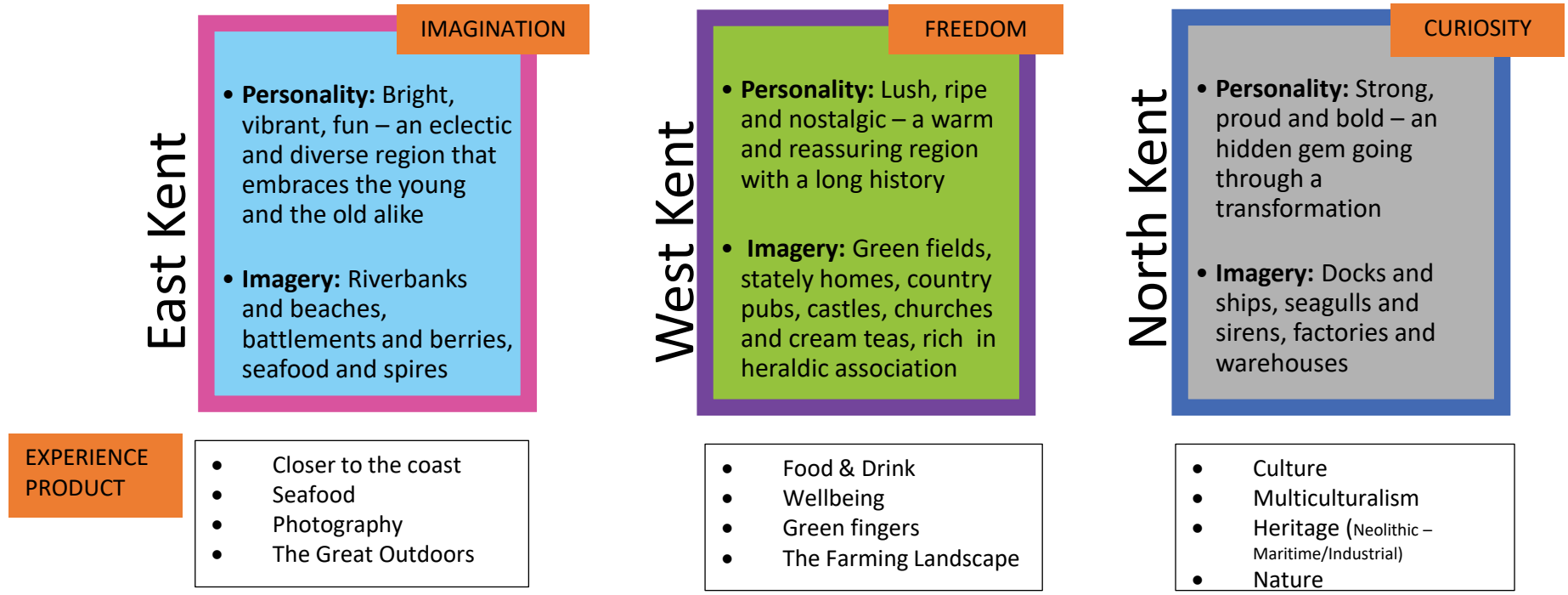
Fig 1.1

Source: VisitBritain media centre Feb 2019 release; Airbnb Experience report 2019 trends; 2020 Airbnb platform analysis



Putting the Visitor First

For an experience led product to be successful, it has to be customer led. Today’s visitors are looking for something that is authentic, unique and makes them feel like a local rather than a visitor. Due to the county’s size and breadth of offer, Visit Kent developed the Visitor First strategy in-order to spotlight the unique proposition of East, West and North Kent, giving them a clear brand voice. Championing the experience-based product, this enables a destination to amplify and even develop the brand message.



East Kent reflects an almost endless list of experience opportunities that align to the historic, nostalgic, creative and retro image of the coast. There is however an opportunity to strengthen this brand voice by capitalising on the countryside.

West Kent finds its brand strength in the established heritage offer, which although always popular with the visitor, can sometimes be a slight hindrance when trying to establish an immediacy to travel. Opportunities around the growth of the food & drink product via year-round accessibility to the vineyards along with wellbeing and self-improvement all offer opportunity

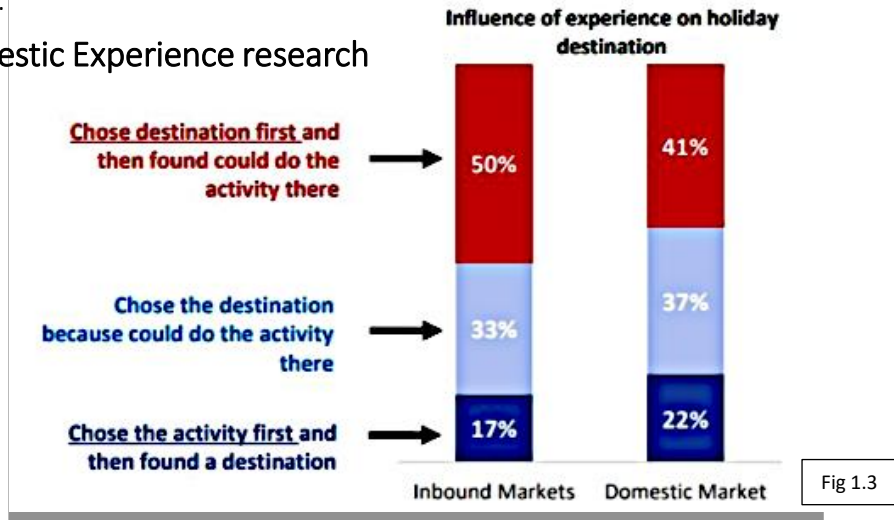
North Kent is dominated by a coastal /industrial image with leading attractions such as the dockyards and naval heritage. However, the emerging strength of the cultural offer, reinforced by the opportunity to build on the region’s multiculturalism will bring hidden gems to the fore, for visitors to discover.



The benefits of experience tourism for Kent

Kent has an established tourism offer, attracting 65 million visitors a year, yet as with many other UK destinations, economic return is skewed towards the summer months. This often dictates that many smaller attractions close from October – Easter and serviced accommodation fluctuates between 60-70% capacity (Fig 1.2). The primary opportunity around experience travel is that it can happen out of core season, and as a result can offer the customer a more exclusive and authentic product.

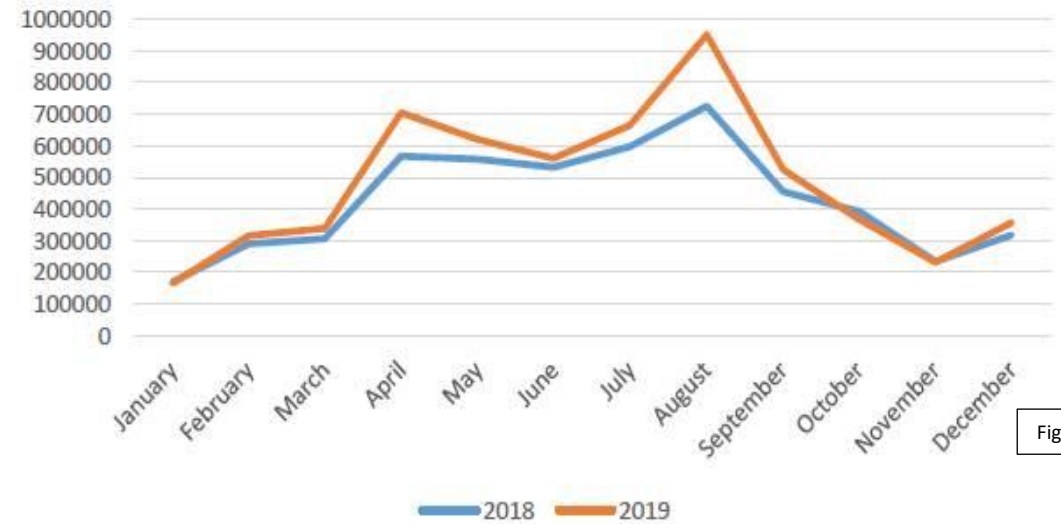
UK Inbound & Domestic Experience research



Developing travel experiences, is an effective way for a destination to reach and influence customers. From recent VisitBritain research, we already know that:

- ✓ **BOOK IN ADVANCE** - When booking an experience, 65% of the domestic market book before leaving home.
- ✓ **WILL TRAVEL UP TO 1 HOUR** - Approximately 80% of domestic customers looking to book an experience are more than 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

Attraction footfall 2019 vs. 2018



The other key component from this research is that target audience journey time should be focused on less than 2 hours.

The highest performing experiences across both international and domestic were:

- Behind the scenes
- Distillery, brewery and wine tours
- Food and drink
- Guided nature/ walks
- Spa and wellness
- Learning and perfecting a skill – photography, baking, authentic craft



Options analysis for East Kent – core strengths

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 and the White Cliffs is so strong, other key areas have often had to fight to be heard.

Folkestone is fast gaining national and international recognition as the UK's largest outdoor art exhibition; which is reinforced by the growth over the last 10 years of the Creative Quarter, home to local artisans and creative SMEs. 2021 will see the fifth Folkestone Triennial, bring world class artists to the town, further cementing Folkestone's positioning as a contemporary arts destination. Can this be utilised further to connect visitors with the town's creative locals?

Dover has long held the iconic status of England's 'welcome home' image thanks to the White Cliffs, insuring the area's inclusion on multiple coach day trips from London. However, dwell time is short with lower than desired economic return.

The profile of the golf product and the now rescheduled championship, The 149th Open, will also shine a spotlight on East Kent. All of these iconic attractions and events deliver a strong foundation to raise the profile of other great attractions such as the surrounding countryside of the Downs with the layers of heritage that are almost passed by unnoticed from the port.

Thanet is home to a multitude of truly stunning blue flag beaches, well deserving to be the backdrop to any fashion or film shoot. However, it struggles with a kiss-me-quick pre-conceived image of an English coastal resort with a domestic audience. Turner Contemporary has confirmed the area's status as a creative centre that takes its inspiration from the natural setting; and the revival of Dreamland and love for 'all things retro' has fuelled the growth of SMEs that collectively celebrate nostalgic, retro, geek appeal – perfect to develop local led product development, aligning to pop culture.

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'.

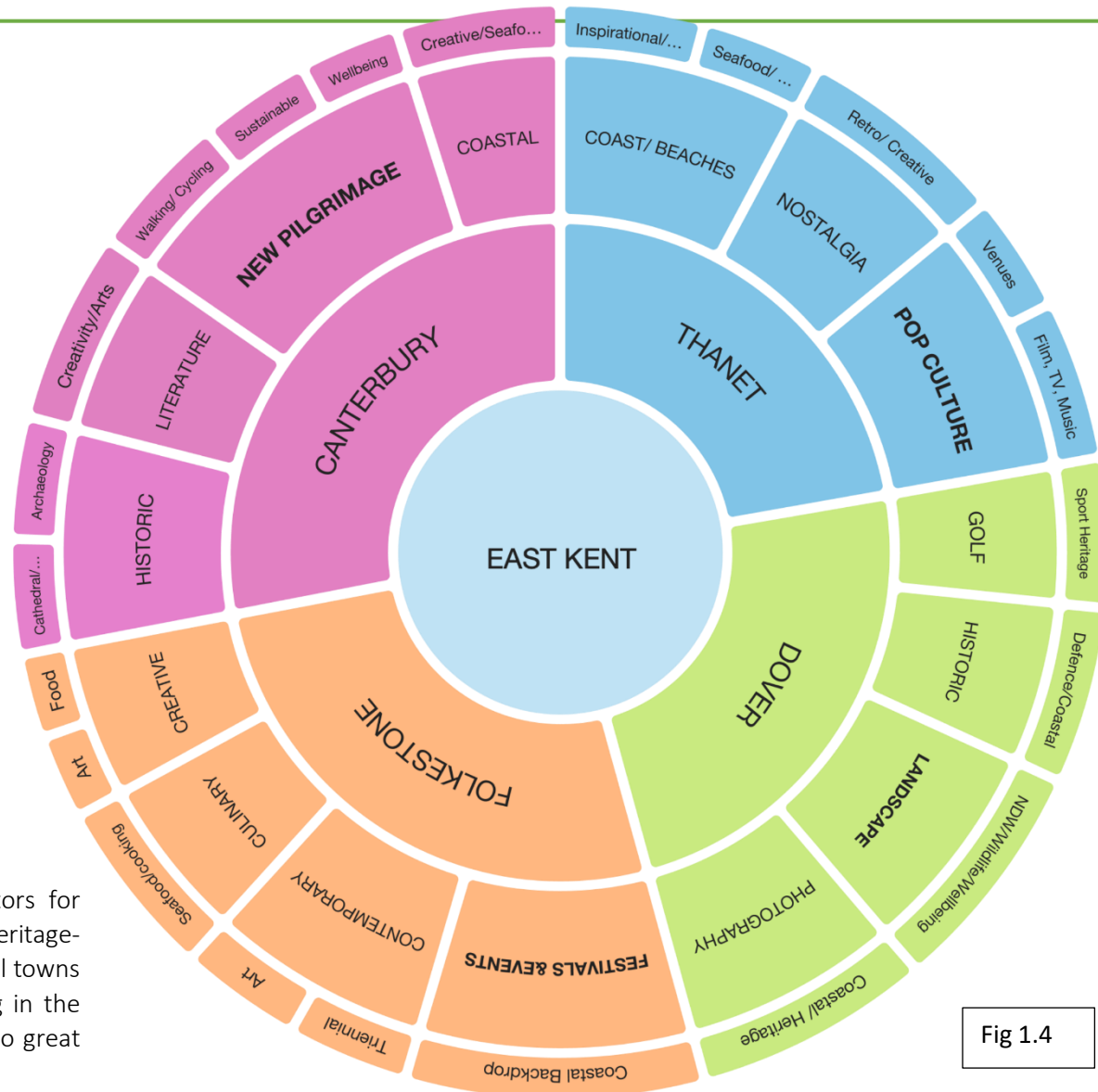


Fig 1.4



East Kent – product opportunities

As part of the in-depth analysis, a number of different platforms were reviewed to assess availability of current product in East Kent, which could be developed/ improved to meet customer demand, along with filling recognised gaps.

- **Closer to the coast** - The traditional visitor encounter with the East Kent coast is to ‘sit on it; paddle in it or view it from the cliff top as part of a day trip experience’. However, this isn’t necessarily the case for other areas of Britain. In Cornwall, you can take a boat to find basking sharks from Sennen Cove, night kayaking in Falmouth or to join a sunrise yoga session on the lizard. Of the 100+ Cornish Airbnb experiences, two thirds relate directly to the coast, while only six of the Kent experiences are based around the coast (walking and beach yoga). From an experience perspective, engaging with the coastline is underutilised; the product is there, from surf schools to beach foraging but it’s not necessarily making it onto the consumers preferred experience platforms. The reality is you can eat it, cook it, walk it, surf it, photograph it, paint it, hunt for fossils in it, and meditate on it. The East Kent coast is crying out for a more immersive relationship with the consumer.
- **Seafood** - Although related to the previous point, seafood experiences are almost non-existent away from the restaurant plate, yet the product comes in fresh on the boats every day. Over the past decade the county has seen restaurants such as Rocksalt rise to fame; weekend events like the Oyster Festival grow in popularity along with the queue outside Wee Willy Winkles in Whitstable, yet there are no bookable seafood experiences. Product development opportunities exist around charter fishing with locals to coastal foraging (especially with the opportunity to catch and cook fresh seafood with samphire from Samphire Hoe) and becoming an expert in oysters, all are possible. This product is relevant from Dungeness to Whitstable, especially with Oysters being the perfect food for October to March experiences... as you aren’t supposed to eat them raw if there is an ‘R’ in the month.
- **Photography** - The East Kent coast is infinitely instagramable – Dungeness lighthouse, Prospect Cottage, Fairfield Church, Denge sound mirrors, Folkestone’s art trail, South Foreland lighthouse, Sandwich and Margate sunsets, Botany Bay, Reculver Towers and Whitstable beach huts. Though to obtain the perfect shot you’ll need a little local info on how to find them and the best time of day to shoot them. Because of the social media appeal, photography courses to discover Instagram’s hidden gems are always popular. To obtain the perfect sunrise or sunset shot, you’ll have to stay overnight, turning an experience into a short break. There is considerable opportunity here to encourage local photographers to share their insider knowledge to create a bookable experience. The gap exists not through a lack of photographic talent in the area, but through a lack of bookable packaged product.



‘The East Kent coast is crying out for a more immersive relationship with the consumer’



East Kent – product opportunities

- **The great outdoors** – Three of the four East Kent districts are home to the Kent Downs AONB and the county’s only National Trail, the North Downs Way. Although the walking product does already exist on the trail, this tends to be in the form of self-guided walks, completing the route in its entirety or 3-6 day sections. For time conscious short breakers, allocating three or more days just to walking ‘the route’ isn’t a luxury they have; equally, multi-generational groups walking for in excess of three hours isn’t an option due to older and younger members. Therefore, in-order to encourage greater engagement with the outdoors in Kent, routes need to be showcased in manageable sections, highlighting how easy it is to incorporate this activity into a visit. The most successful Airbnb walking experiences combine three core components –
 - a.) landscape/ views/ architectural vistas
 - b.) historical or cultural insight, and
 - c.) connection to insider information from a local guide.... and it has to be fun!

This applies to town or countryside, the major issue for rural based walking experiences is connectivity. The product is there, the issue often lies in ease of access from public transport, or the ability to engage with the North Downs Way as part of a circular route to accommodate the return to a car.

Accessibility – As one of the most rail connected national trails in England, the North Downs Way can easily be packaged at linear sections from station to station , a product that is already under development as part of the ‘Rail 2 Trail’ scheme.

Getting close to nature – Seal watching, bug hunting, rock pool expeditions with an expert and fossil hunting on the shoreline are all actual products that exist, but at present they are only promoted as part of the countryside project offer for ‘in the know’ locals’. With a slight repackaging, these activities could easily be repositioned as a tourism experience, especially for family groups.

Water sports are available along the entire coast, although some are weather dependent, opportunities around fishing, sand-yachting and kite surfing are available for most of the year. This activity has a relatively low profile on the Kent TripAdvisor pages and currently doesn’t feature at all on Airbnb.



‘In-order to encourage greater engagement with the outdoors in Kent, routes need to be showcased in manageable sections, highlighting how easy it is to incorporate this activity into a visit’





East Kent – product opportunities

- **Thematic experiences-** Hands on experience and behind the scenes access are always popular, whether that's walking with your own micro pig, making something in an artist's studio or learning how to clean the silver in a stately home.
- **Food and drink** is by far one of the most popular experience products at the moment, but rather than just eat it or drink it, the visitor would like to try their hand at learning how to make sough dough bread or distilling gin. The interest in wild cooking and foraging are also growing exponentially, yet in many coastal areas there is a need to manage and safeguard sensitive locations; developing bookable product is one of the best ways to manage and educate would be coastal foragers.
- **Horrible histories** – The plethora of military, maritime and archaeological sites lend themselves so well to experiences, especially if artefacts can actually be handled. The development of regular experiences that combine an element of the museum with a walking tour and a pub/ coffee shop visit have proved to be successful, especially around specific themes such as ghosts and historical events. Great examples are the Canterbury Ghost Walk or the Rotten Ramsgate tours. Focusing on delivering an experience rather than presenting a collection can challenge the traditional small museum model, but from an income generation perspective, this can be a more effective way of engaging volunteer staff away from peak season.
- **Creative classes** - This product already exists across East Kent, but currently operates predominantly on a local level. These courses are hands on, often located in artist studios or community creative spaces and have infinite appeal for the winter months, where courses are rapidly becoming the go-to bookable Christmas present. The gap appears to be around the awareness of this product and the level to which the creative sector recognises the value of tourism platforms.





East Kent - Folkestone & Hythe District experience product opportunities

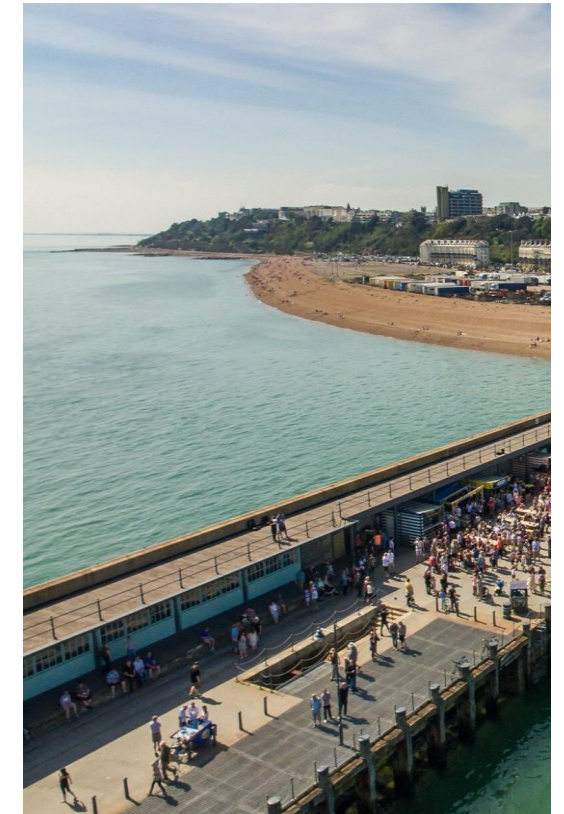
Folkestone, Hythe & Romney Marsh: Product Strengths: Creative Quarter, summer events programme across the whole district, the quality and status of the art installations, the appeal of the coastline/ beaches and the uniqueness of the Marsh offer (landscape/ historic sites & wildlife).

Experience	Lead opportunity underutilised at present	Product example
Art walking tours	<p>There has been a considerable investment into the contemporary arts product in Folkestone, at present the visitor interaction is via a comprehensive self-guided tour. There is an opportunity to build on this product and create a local artist-led walking tour and possible workshop experiences. The connection between the art installation and the local artist gives the visitor an insider view/ town pride that you don't get from a self-guided tour. Local guides will also interject with their views, wider facts about the town and quite often insider knowledge such as where to get the best coffee.</p> <p>Art photography tours are an additional opportunity.</p>	<p>This is a successful model already used in New York for guided tours of art on The Highline. Alternative London's street art walking tour, can be purchased with or without a creative workshop session at the end. What makes these tours so successful, is that they are delivered by local artists.</p> <p>www.alternativedn.co.uk</p>
Building the current events programme	<p>Developing new product from Oct-Mar that taps into key trends and interests e.g. coffee festivals, wine and gin, geek fest. Creative courses also increase in popularity over the winter period as people look for a release or the workshop had been purchased for a Christmas present</p> <p>Strengthening current product -E.g. Cheriton currently holds a February light festival - workshops are held with local schools and community groups, but they could incorporate public workshops experiences.</p> <p>Equally, capitalising on flexible spaces such as the Quarter House, to deliver a full arts programme</p>	<p>LightNight Liverpool work in partnership with the Lantern Company to create a series of bookable creative workshops throughout February.</p> <p>www.lightnightliverpool.co.uk</p>
The Marsh on Instagram	<p>From cycling tours to sunset photography experiences – often some of the most Instagrammable subject areas are the hardest to find – Denge sound mirrors, Fairfield Church or Prospect Cottage (By Arrangement).</p> <p>The Marsh churches offer a variety of experiences and stories which can be brought to life on a tour.</p>	<p>Instagram has the ability to make celebrities of hidden places e.g. the back door to St.Edward's Church in Stow in the Wold</p>
Cooking/ foraging/environmental management	<p>Capitalising on the celebrity status of restaurants like Rocksalt – there is an opportunity to grow the current cooking course offer around Folkestone. Opportunities to develop product around coastal foraging etc in a managed and sustainable way that educates participants on the fragility and uniqueness of the coast.</p>	<p>Celebrity Chef cooking classes in Eastbourne – Airbnb</p>
Youth culture and multigenerational travel	<p>With the opening of the F51 skate park, there is an opportunity to further develop a street art and activity offer for Folkestone. Indoor skate parks increase in appeal during the winter months and offer the perfect additional benefit for families with teenage children who are looking for specific activity during a UK short break – An opportunity that has already been noted by Source park in Hastings and nearby accommodation providers during the winter season.</p>	<p>www.skateboard-England.org already offer skateboard summer camps in Birmingham, Leeds, Broadstairs etc..</p>



Product priorities – opportunities & gaps

	Primary Themes	Gaps analysis for selected themes
Folkestone & Hythe	Creative Courses / Arts	<p>Creative course development is one of the most effective ways for a small business or attraction to diversify to appeal to small group visiting during off season/ mid week. The courses themselves can range dramatically, from one day herbalist courses to cooking, baking, brewing, cooking and growing or a full variety of crafts and practical skills such as upcycling.</p> <p>Increasingly the key audiences for the trendy courses are the millennials, but they are also changing the travel trends of their parents who are retiring earlier, and want to learn new skills, often engaging in crafts and educational courses.</p> <p>They all want more than just a classroom environment; the location, the back story of the teacher/ guide and what they take away from the experience are all important creating more of an 'edutainment' approach.</p>
	Events and festivals	<p>The transformation of the creative quarter over the last 10 years has resulted in a cultural destination that not only has the ability to attract Turner Prize winning artists such as Mark Wallinger, but has provided a base attracting an influx of creatives as well as nurturing home grown talent.</p> <p>The breadth of the creative community has not only given rise to the Triennial, but to localised events such as SALT and the Folkestone Book Festival, as well as being home to the UK's largest outdoor exhibition of contemporary art.</p> <p>The reality is that culturally Folkestone is punching above its weight, with the quality and gravitas of the artists it's attracting – But is this offer reaching the wider visitor market all year round?</p> <p>Events give a time specific reason to travel, but bookable product that is available all year round can offer a continual way to engage with the culturally inquisitive visitor, who wants to connect with the community. Delivering a guided local artist tour, potentially linked to a hands on creative experience can be delivered away from the core events programme, so plugging the gap.</p> <p>Events and product that taps into the strength of the destination as well as national and international trends also offer great opportunities e.g. the growth in food and drink experiences aligned to a seafood event and the UK's first Giraffe Hotel.</p> <p>The challenge is increasing awareness. The art scene knows what's happening in Folkestone, but does the wider tourism sector? Having bookable product on platforms such as TXGB will deliver creative Folkestone to both a domestic and international consumer/ trade audience. But there must be bookable product.</p>



Events & Festivals



East Kent -White Cliffs Country – experience product opportunities

Dover, Deal, Sandwich: Product Strengths: Golf, heritage, iconic natural heritage, coast,

Experience	Lead Opportunity underutilised at present	Product example
Archaeology	Although Dover is dominated by one of the largest castles in England, its wealth of archaeological heritage remains a bit of a hidden gem. Building on the uniqueness of the bronze age boat discovery in 1992, there are a plethora of significant sites around the town that could offer the potential for the Dover Museum and the Archaeological Trust, to collectively package an opportunity for visitors to get involved by offering dig day experiences or museum behind the scenes days covering restoration projects.	Dig Ventures offers the opportunity for wannabe archaeologists to study and learn first-hand on one of their courses or by joining one of their experiences on a real dig. www.Digventures.com
Golf plus	Although the actual course proposition is strong, as with other high profile golf locations, there can sometimes be a disconnect with how local businesses both capitalise and develop their offer to align to strong appeal of the game. This is an opportunity for accommodation and hospitality providers, encouraging a greater economic return to the local community.	www.visitscotland.com not only for the way they present the golf offer, but how they place it into both a historical, cultural and environmental context for the destination.
Getting close to nature	The coastal and countryside offer is a strength, however there is still a clear opportunity to increase visitor engagement in a sustainable and managed way. At present the White Cliffs Countryside Partnership offers a range of experiences aimed at all family members – however these predominantly target the local community rather than attracting visitors.	www.nationaltrust.com The National Trust coastal areas attract 1000s of visitors each year – but to engage them with the trusts conservation message they offer bookable courses e.g. Blean Beach, Somerset
Combination walking tours	Both Sandwich and Deal offer layers of history, good quality dining and rail access, making them the perfect destinations for historical food safaris. This combination of walking, talking, eating and drinking is a fantastic way to introduce visitors to the local history while delivering a wider benefit to the local economy.	Great example walking tour format in Canterbury and York, but also for a smaller scale example at St. Peters village tours in Broadstairs and the Rotten Ramsgate Tours
Pilgrimage	Although Canterbury is seen as the main Kent pilgrimage destination - the Canterbury to Dover section of the North Downs Way also comprises the initial section of the Via Francigena. (The Canterbury to Rome Pilgrimage route) – A short section that could easily be packaged. Adding additional layers of experience, such as mindfulness walks, walking with different animals and historical walks increases the appeal.	The Camino de Santiago – walking the last 100k. Airbnb SW Coast Path experiences 3-4 hours walking with lunch.
Coastal photography	Photography is an East Kent wide opportunity, but due to the iconic status of the white cliffs and the environmental sensitivities around their management access isn't always easy. Photographic opportunities from sea safaris as well as from other key vantage points like Samphire Hoe create new experiences around a currently popular attraction. This offers a great way to capitalise on the iconic popularity while introducing visitors to other areas. The other notable area for photographic opportunities are military/ industrial sites.	Paul Reiffer Photographer runs exclusive luxury workshops on the Jurassic coast which is all inclusive £££ - luxury/ top end experience. Both of the following run coastal courses www.paulreiffer.com www.melvinnicholsonphotography.com



White Cliffs Country product priorities – opportunities & gaps

Core District Themes : Dover, Sandwich, Deal

	Primary Themes	Gaps analysis for selected themes
Dover Deal Sandwich	Landscape and nature	<p>The recent survey conducted by Natural England to monitor engagement with the natural environment (Sept 2019) highlighted, that the number one engagement with green spaces was via the urban park.</p> <p>Urban parks are easy, accessible and convenient, however, their experience scored low on positive outcomes (the way they made people feel). The areas that scored high on emotional outcomes were; mountains/hills, woodland/forests and farmland. Therefore, the data indicates that the consumer has a high desire to engage with the natural landscape and nature yet perceives it to be difficult. To overcome these hurdles/plug the gap, experience led activities that take visitors into the countryside would start to dispel these concerns. E.g. ‘Walking the Farm’ farm visits are often based in the farmyard location, however it’s the confidence to get out into the farmland where visitors need the reassurance, this can also be linked to the Kent Connected app to assist and educate visitors safely. Exploring the coast, getting away from the tourist beach and taking a closer look at the coastal wildlife with a guide.</p> <p>A way in which visitors can be encouraged back into the countryside is by combining the experience with another one of their passions, for example:-</p> <ul style="list-style-type: none"> a.) Foodies turned foragers - Moving the love affair they have with the plate to a new relationship with the plants. b.) Fitness – trading in the dumbbells for the Downs and the fitness class for the foreshore. c.) Stop scrolling and start shooting – Instagram has made wannabe photographers of us all, but how, when and where we can access the perfect shot is often a best kept secret. d.) And Breathe... - Focusing on the value of the landscape for wellbeing – walking, cycling, nature safaris or just taking in the view. <p>All of these experiences are linked by the fact that you need to get out into the landscape and experience the benefits of the surrounding natural environment. Issues over uncertainty and safety can be overcome by joining a group/ having a guide.</p>



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Landscape & Nature



East Kent - Canterbury, Whitstable & Herne Bay 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 and cycle	<p>Walking and 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>
<p><u>Sustainable food</u></p> <p>Seafood – oysters</p> <p>Veg/ vegan offer</p> <p>Local growers</p> <p>Bushcraft and wild cooking</p>	<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 wildlife reserves, now produces top quality veg for five-star hotels.</p> <p>Bushcraft/ wild cooking is also on the rise – new local product like @bangersandballs, Jack Raven bushcraft and Natural Pathways provide forage and 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 five-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 and restoration	<p>There is a cross over here with Dover and potential for an operator to offer dig opportunities in more than one 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 theme
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> The Gen Z audience position 'sustainability' high on their destination selection criteria, where as 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>



Pilgrimage & Sustainability



East Kent - Thanet – experience product opportunities

Thanet: Margate, Broadstairs, Ramsgate Product Strengths: Art, beaches, family fun, seaside, curiosities, nostalgia.

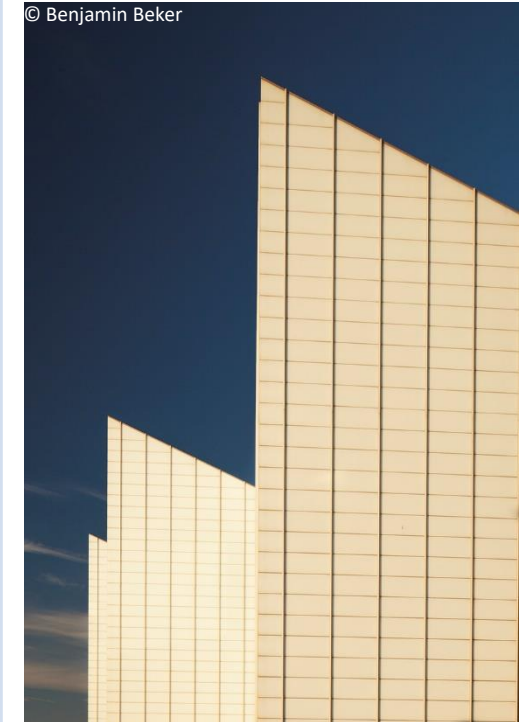
Experience	Lead opportunity underutilised at present	Product example
Home grown creativity	<p>Margate and Broadstairs are increasingly seen as a creative hotspot for visual art and retro style, appealing to the new wave of ‘escaping Londoners’ making their way to the coast. It is also recognised as a place that nurtures creative talent, hence the experience product opportunities here could accommodate pretty much anything.</p> <p>E.g. cookery, creative writing, pottery, burlesque, woodwork, metalwork, beachcombing artwork, glass working, pop-up music venues, costume hire, painting, fishing, surfing, photography, wild swimming, tea drinking and Japanese drumming... to name a few.</p> <p>All of this is underpinned by the presence of Turner Contemporary and the creative minds that have been inspired by the coast (Turner, Dickens etc). Margate Creative as a collective group are a great source of ideas and potential experience hosts.</p>	<p>Capitalising on the historical art scene.</p> <p>www.barnoonworkshop.co.uk</p> <p>www.sandinyoureye.co.uk create stunning sand art and run beach-based workshops.</p>
Retro / pop culture appeal	<p>Seaside nostalgia and retro appeal are clearly interwoven within Margate’s appeal, along with a slightly geeky undertone supported by great little attractions like the Micro Museum, where you can immerse yourself in 80s video games. All of this is currently having a phenomenal revival thanks to the global success of Netflix’s Stranger Things, which is set to continue with season four releasing in 2021. This is reinforced by Dreamland as an established product, along with the retail and architectural offer of all three coastal towns.</p> <p>There is clearly an opportunity for Thanet to position its current product to appeal to this mass Netflix audience especially as the area has several escape rooms.</p> <p>In addition there is also the opportunity to build on components of themed events such as the Dickens festival to introduce genre specific experiences such as Victorian Bathing or exploring opportunities with organisations such as the Dreamland Trust.</p>	<p>Scotland Comicon is scheduled for October 2021 – the lead show featured is Stranger Things.</p> <p>www.designmynight.com will launch a Stranger Things retro bar in the centre of Manchester this autumn, with a ticketed experience.</p>
Photography/ film and TV	<p>Although Thanet has featured in films, tv series and ad shoots, it is still waiting for its starring role. Screen tourism hinges on the audience’s ability to recall the location, even if they can’t name the actual location at time of viewing. In order to build Thanet’s reputation as a location, info on film locations need to be integrated into all types of tours e.g. art, photography, history, will continually galvanise the consumers understanding that Thanet is a film destination, even if the product isn’t strong enough to stand alone just yet.</p>	<p>www.londonwalkingtours.com – numerous walks, regardless of subject will incorporate film location references to broaden the appeal of the tour product.</p>
Wild cooking / Seafood/ fossil hunting	<p>Bushcraft/ wild cooking is also on the rise – new local product like @bangersandballs and @taralezkhov could be great ambassadors to take this product forward. Development of the experience product around this interest, is a great way to manage and safeguard the beach environment, alternatively there could be an opportunity to approach national organisations that specialise in certain fields such as UKAFH and UK Fossils who currently organise fossil hunting experiences in Herne Bay.</p>	<p>July 2020, Ray Mears launched a new wild cookbook – highlighting the growth trend</p> <p>UKAFH and UK Fossils already run fossil hunting experiences in Herne Bay</p>



Thanet product priorities – opportunities & gaps

	Primary Themes	Gaps analysis for selected themes
Thanet	Music, pop culture and film	<p>There is no doubt that screen tourism can be an overnight success story for any destination, however the destination must be a leading star of the drama or film, whether it is the lead location or named destination.</p> <p>For example - Peaky Blinders was predominantly shot in Yorkshire with additional locations in Liverpool and just outside of Birmingham. However, the audience were repeatedly told in the storyline that this was Birmingham. As a result 'The Real Peaky Blinders' tour developed, telling the true but sometimes gruesome history of Birmingham's backstreets, using the TV drama as the bait. Equally 'Call the Midwife' is set in SE London in the 50's/60's but is predominantly shot on location at the Historic Dockyard – Due to the repeated use of key locations, the dockyard has a successful 'Midwife' tour based on audience location recall, due to its popularity in the UK and with anglophile audiences.</p> <p>Thanet still needs to land a key drama series in either name or location to reasonably activate its screen tourism appeal. To date the district has made numerous appearances in film and TV series, but possibly not enough for clear audience recall.</p> <p>The district is however brimming with potential to capitalise on the current popular culture revival for the 80's. Thanet's strengths are its nostalgic authenticity, its retro style and the strength of the creative community.</p> <p>The gap is the collective partnership that's needed to glue together SME's such as costume hire, retro shops, themed museums, bike hire, not to mention five escape rooms, to potentially deliver a coordinated experience offer.</p> <p>Music is another hidden strength, from resident artists to exclusive locations, all have potential to offer a great experience.</p> <p>Finally, hands on creativity - Thanet not only has the Turner as an artistic anchor, but a creative and inclusive community whose imagination seems to know no bounds offering extensive opportunity to offer creative courses and experiences to the visitor. The gap is bringing this creative community one step closer to the destination story, rather than delivering alongside.</p> <p>For smaller attractions, there is the possibility to partner with other businesses to deliver 'pop-up pop culture' experiences to raise awareness – e.g. the Micro Museum delivering a pop up arcade in a central location.</p>

© Benjamin Beker



Pop Culture



Options analysis for West Kent – core strengths

West Kent is dominated by a strong rural countryside product, thanks to a considerable proportion falling into the High Weald and Kent Downs AONB. The area is rich in heritage attractions along with a rural towns/villages product. Over the past 10 to 15 years, this has formed the perfect backdrop for the development of an excellent food and drink offer; most notably being the rise in vineyards that are increasing year on year.

Ashford benefits from good rail and road connectivity, linking London and the continent in less than an hour. Home to some of Kent’s most well-known vineyards like Chapel Down and Gusbourne, it also has a considerable section of the North Downs Way with outstanding areas such as the Wye Downs, Westwell and Chilham. This is complemented by village gems such as Smarden, Biddenden and the market town of Tenterden.

Tunbridge Wells is known for its Georgian gentrification, royal spa status, abundance of stately homes and Wealden countryside. The borough offers a wide range of activities from sailing and mountain biking to rock climbing and curling. To complement the outdoor offer, there is also a range of spa and pampering treatments and opportunities for self-improvement from expanding your wine knowledge to perfecting your pianist skills.

Sevenoaks can be somewhat overlooked as a short break destination due to its proximity and rail connections to London, leading to a high number of day visits to its castles, gardens and stately homes. Focusing on generating experiences through activities such as behind the scenes and ‘how to’ courses, could be effective in increasing dwell time as well as off-season short breaks.

Maidstone/Tonbridge and Malling Boroughs are dominated by the Downs and the Medway River as well as being home to iconic heritage sites such as Leeds Castle. The river and a high percentage of the area that falls within the AONB, offer a brilliant backdrop to explore farm diversification experiences, from hop growing to green florists, as well as excellent rail connectivity for the North Downs Way and river experiences.

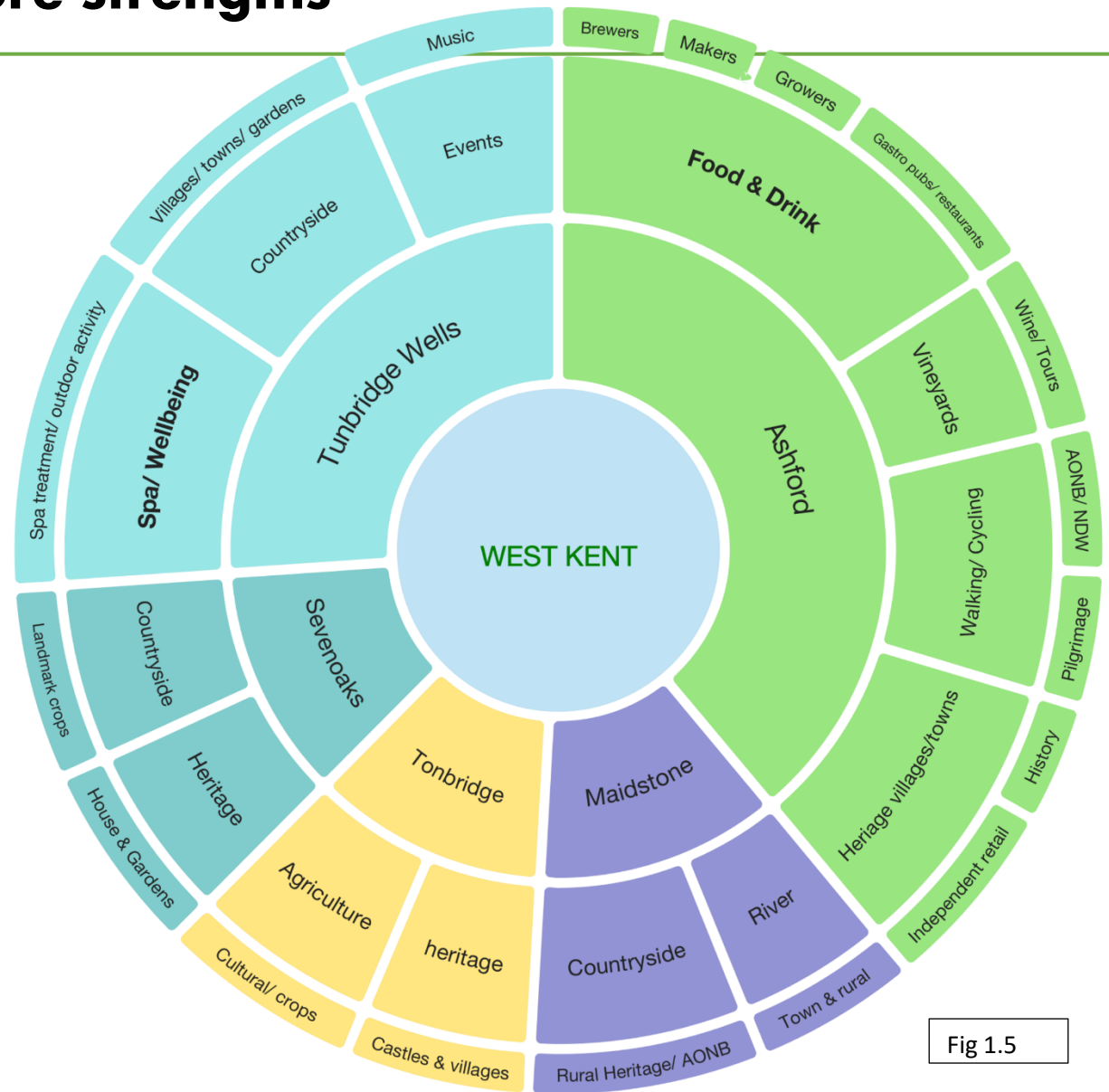


Fig 1.5



West Kent – product opportunities

- **Food and drink** - The appreciation for all things grown is heavily influencing our food choices, increasingly we want to know the origins and sustainable credibility of what we eat. Restaurants that specialise in seasonal dishes and operate a 25-mile policy on food sourcing have seen this approach work in their favour. E.g. The Pig Hotel and restaurants like The Smallholding where they grow on site. The growth of vineyards in the south-east of England is increasing exponentially; there are 168 wineries and 658 vineyards in England, out of the 3759 hectares on the vine, 2720 are in the South-East. West Kent has the highest concentration of vineyards in the county, with 17 in the Ashford district alone. This coupled with the numerous distillers such as Anno and Greensand Ridge as well as brewers and cider makers, market gardeners, organic farms and a range of excellent restaurants, all indicates the area is well on its way to becoming a first class food & drink destination.



- **Green fingers** - In the UK there are around 27 million people who partake in gardening and since the Covid-19 pandemic hit in March 2020, there are now even more budding horticulturalists who can't wait to grow their own veg. This is also a trend prediction for the next decade where the average age of gardeners will be getting younger. As we strive to reconnect with the land, ecology and sustainability are predicted to increase in importance as consumers question where their plants and food products are from and how they are grown.

There is an opportunity for gardens and growers to diversify into offering experiential courses, where consumers can learn direct skills by combining the authenticity of an established garden that is open to the public and an opportunity to go behind-the-scenes and learn directly from the gardeners. For example, the rose pruning courses held at Sissinghurst Castle (NT) in February have always been a sell-out and Great Dixter courses always have a waiting list. The key is to appeal to the novice as well as the experts.

- **The farming landscape** (agriculture, horticulture, viticulture)- Fuelled by lockdown, current research shows that domestically we are keener than ever to rekindle our connection to the countryside. However, this does hold some uncertainty for more urban dwellers. Packaged product that invite visitors to engage and learn about the farming calendar through hands-on experiences will break down those barriers. Great examples are: lambing, more and more organic farms are bringing the lambing calendar forward, so the season now runs from December to April; pruning and training hops, apples and vines, all need to be pruned and trained between January to early March and although the weather can be an issue, bright sunny cold days in the vineyard followed by a hearty lunch offers the perfect experience.





West Kent – product opportunities

- **Wellbeing** - Reconnect, relax and recharge. Consumer interest in mindfulness and wellbeing has moved from niche to mainstream. Increasingly the visitor seeks holidays with reduced digital interruptions so they can recharge and feel positively changed. What we do to achieve a greater sense of wellness and wellbeing is different for everyone. For some it is the sense of fulfilment delivered by adrenaline sports, for others it's acquiring a skill or having time to relax. For West Kent the offer focuses on three key areas of opportunity:
- **Pampering and spa treatment** - according to the Global Wellness Institute the wellness traveller spends 50-60% more than the general traveller on an experience, but this goes well beyond the confines of the spa having a knock-on effect for hospitality and retail.
- **The great outdoors** - whereas East Kent can offer the coastal experience, West Kent benefits from a more leisurely water offer with the Medway, Stour, Tees and Darent rivers as well as Bewl Water. In addition, there are forestry areas at Bedgebury and Hempstead offering cycling, walking and horseriding; along with indoor and outdoor rock climbing and a curling rink in the winter. Although the active consumer/thrill seeker may look to Cornwall or Wales to fulfil the need for outdoor pursuits, the drive time to accommodate this into a busy week can often limit the opportunity to actually get away. West Kent is on Southeast London's doorstep, the challenge is to disperse users away from the honeypot locations such as the Darrent Valley, informing them on how to access undiscovered areas of the North Downs Way.
- **Transformative travel** - as we search for activities that will leave us positively changed, there is an opportunity to develop both day and short break experiences that enables the consumer to learn a new skill while taking time to reflect. There are also opportunities to utilise the North Downs Way as the perfect backdrop for a new form of pilgrimage in search of wellbeing and mindfulness, along with woodland yoga and creative courses.

'There is an opportunity to develop both day and short break experiences that enables the consumer to learn a new skill while taking time to reflect'





West Kent – Product Opportunities

- **Heritage unlocked** - Heritage is a UK wide strength, and the large concentration of both National Trust and privately-owned properties in West Kent, has been a major pull for visitors for years. The mass footfall of day visitors can't get enough of the stories behind great castles and homes like Leeds, Hever or Chartwell.

They also relish in the fact that places like Penshurst, Lullingstone, Pashley Manor and Godinton are still family homes. But the consumer is looking for something more than just a roped off one-way system; they want the personal tour that showcases the life as well as the history, they want to go behind the scenes.

For example, privately owned properties like Chavenage house in the Cotswolds offer family tours (i.e. a member of the family will actually deliver the guided tour) where small groups can gain a unique and often hilarious insight into the life of the house. Opportunities to gain a more in-depth insight into the restoration of a building or artefact is extremely sought-after.

One of the most popular tours at Canterbury Cathedral has been access to behind-the-scenes closed door restoration. This type of experience works well out of main season when the visiting numbers naturally begin to fall and delivers instant bragging rights especially to international visitors.

'Consumers want the personal tour that showcases the life of a property as well as the history'





West Kent - Ashford Borough experience product opportunities

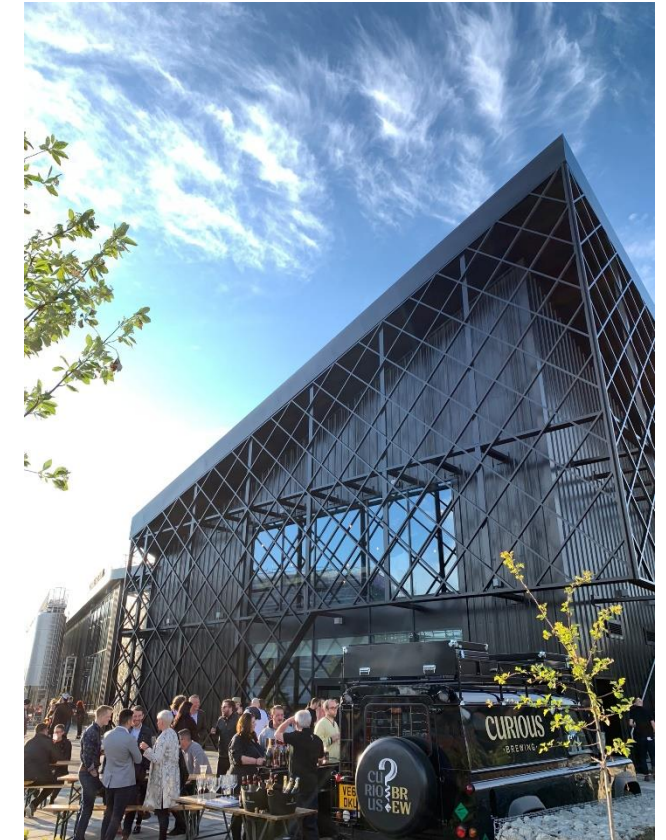
Ashford, Tenterden and Villages: Product Strengths: The quality of the food and drink offer, specifically the concentration and variation of the vineyards both private and open to the public. Breadth of offer across food and drink from brewers, distillers, wineries as well as cider, farm shops and growers.

Experience	Lead Opportunity underutilised at present	Product example
Vineyards	Ashford borough has one of the highest concentration of vineyards in the south of England, with new vineyards being planned and planted continually. Although food and drink as an experience message is strong, the density and quality of the vineyards and wineries in the district indicates that this product should stand out as a destination trigger. Wine production in the South East has increased three-fold since 2017 with continual forecast growth, at present visitor figures show that the wine tourism market currently breaks down at 86% domestic and 14% international.	A collegiate approach to promoting an area as a leading wine region has worked effectively for the following areas: Margret River – Western Australia Willamette Valley - Oregon, USA
The wider food and drink experience	Food and drink is the most popular product experience on the TripAdvisor and Airbnb platforms. But, gone are the days where we just want it to taste good! An increased awareness of the importance of traceable and sustainable food sourcing, has led to the profile of the grower being almost as important as the chef. Brewers, distillers and cider makers are offering tours and tastings, growers and farmers are offering dining experiences e.g. @the_wonky_parsnip offers a supper club in their polytunnels. Tracing from fork to fork and sharing the narrative is so important if Ashford wants to be seen as a first-rate food and drink destination.	One of the best examples of farm/ food diversification to deliver a travel experience is @florishproduce in Cambridgeshire. A multi award winning producer, educator and experience deliverer.
Walking and cycling (incorporating village and town)	The borough has one of the longest sections of the NDW along with a fair share of Landscape honeypots like the Wye Downs... all of which form the perfect backdrop to a walking and cycling product. Additional routes like the High Weald Landscape Trail, the Stour Valley and Greensand Way also offer a varied selection of walking terrain. The key appears to be delivering product that offers the consumer the opportunity to join guided groups as well as self-guided options, overcoming any fears about exploring the countryside away from home. There is also the opportunity to work collectively with other districts to raise the profile of the pilgrimage/ wellbeing product in relation to the NDW. There are numerous walking festivals that offer the opportunity to join a walks programme – e.g. The White Cliffs Festival (Dover) however to appeal to a broader customer base, joint themed festivals could engage more people e.g. Walking and Wine	South West coast path guided walking experiences on Airbnb Walk Scilly is held first week of April and incorporates a different theme on every walk over the five-day programme e.g. Maritime history, foraging, wildlife spotting, fossil hunting etc. Cycle UK projects
Heritage villages and towns	The appeal of the village pub experience is consistently ranked highly for both domestic and international visitors, yet as the villages often lack a retail experience, dwell time averages 1-2 hours - this can be extended by adding a walking route to start or finish in a village location. Independent retailers in small market towns also offer a welcome change from the major chains and shopping centres and their individual stories can be used to add a back story to the destination.	Midhurst circular walk – as a small market town with less than 50 high street businesses, they promote pre and post breakfast, lunch and dinner walking routes to engage the customer



Ashford Borough Product Priorities – Opportunities & Gaps

	Primary Themes	Gaps analysis for selected themes
Ashford	Food and drink	<p>This is a real strength for the district, where wine is a dominant feature. Not only does the district house leading brands such as Chapel Down, Gusbourne and Curious Brew, but it also has the small family producers such as Nightingale Cider and Westwell Wines.</p> <p>By focusing on the experience of visiting, learning and sampling the produce, the district can position itself at the heart of food and drink production for the county. However, there are some gaps:</p> <p>Events - The events programme delivered around food and drink should nurture and showcase homegrown talent, at present many of the food and drink events are delivered by national events organisers who although try to recruit local exhibitors do not have an underlying commitment to 'buy local'. As a result, an opportunity is missed to introduce residents let alone visitors to the borough and Kent wide offer.</p> <p>Visitors want to experience the back story as well as the food on the plate, when this comes together as a complete product it is a winning formula. Encouraging the development of experience food and drink products, that takes the consumer on a complete journey and builds a relationship, and will galvanise Ashford's position as a premier food and drink destination.</p> <p>This connection with the food and drink journey is also a great way to connect visitors with the borough's walking and cycling product, there are several vineyards located directly on the NDW, along with farm based accommodation and numerous rural gastro pubs that pride themselves to be sourcing local, so providing a great opportunity to promote culinary sections of the North Downs Way or Stour Valley Way.</p>



Food & Drink



West Kent - Tunbridge Wells Borough experience product opportunities

Tunbridge Wells, Cranbrook, Hawkhurst, Villages: Product Strengths: All product that can link and support a destination wellbeing message – Spas, health, outdoor activity, personal learning. Countryside, rural villages and town-based heritage, castles, gardens and stately homes. Tunbridge Wells, The pantiles, unique events e.g. The Puppetry Festival.

Experience	Lead Opportunity underutilised at present	Product example
Spa/ Well being	<p>Having the historically recognised spa town of Royal Tunbridge Wells at the heart of the Borough, gives any product proposition based around a spa and wellbeing a level of authenticity.</p> <p>There is a quality spa offer with hotels like The Spa Hotel and centres such as Knowles near Goudhurst however, the Borough does lack a signature spa facility such as the Thermae Spa in Bath. In-order to use this theme and incorporate the spa treatment already on offer, focusing the Tunbridge Wells offer around wellbeing would be a much stronger proposition. Additional product that contributes towards the wellbeing offer are meditation and yoga retreats, alternative therapies, life coaching ,herbalist workshops, education and activities.</p>	<p>The offer of treatments via day spa facilities is a strong component in a wider leisure experience – Great examples of spa experiences are either - destination spas offering a full range experience over 1-3 days or specialist facilities e.g. The Detox Retreat at Simple Healing in West Sussex.</p>
Outdoor pursuits	<p>There is an opportunity to link the spa/ relaxation product with the outdoor activity offer. Tunbridge Wells is the only place in the county where you can go curling and has both indoor as well as outdoor rock climbing. Mountain biking is covered at Bedgebury, Hemsted and Bewl Water which covers cycling, walking and water sports.</p>	<p>Activity break packages – great examples of how a localised activity offer can be packaged with a spa treatment/ hotel - www.intotheblue.co.uk this company already packages activities across the county from racing to bee-keeping.</p>
Special interest bespoke tours	<p>Tunbridge Wells Borough has a strong heritage offer, both National Trust and privately-owned properties. One of the fundamental challenges for independent visitors is how to access rural heritage without a car (public transport is unreliable to remote rural locations even in peak season). This does offer an opportunity for the development of special interest bespoke tours.</p> <p>Even the most popular of attractions can be hard to access e.g. Sissinghurst and Penshurst Place – however there is an opportunity to take chauffeur drive to a new experience-based level - offering a personal planner service.</p> <p>There are also pockets of special interest excellence within the borough, such as Piano lessons at Finchcocks – this is a relatively new offer and given the quality of the setting could offer an excellent example of a niche transformative experience.</p>	<p>A great example is www.realyorkshiretours.co.uk who offer a full range of experiences from walking trips, creative courses, guided tours... and even how to become a butcher!</p> <p>The Experimental Perfume club – day courses with a trained perfumer to create your own perfume www.experimentalperfumeclub.com</p>
Gardens & the Plant to plate revolution linked to wellness	<p>As a nation we are mad about gardening – at present the ‘plant to plate’ revolution is showing no signs of decreasing with over 90,000 Brits currently on the waiting list for an allotment. The new breed of British gardeners are here... The Late Bloomer segment (35-55) are keen to get their hands dirty but don’t know how. The Millennial gardener views gardening as an extension of personal wellbeing and the Eco Gardener wants to garden with the help of nature. Designing gardening experiences that meet the needs of these new wave gardeners could offer a huge opportunity for heritage attractions and larger national organisations like the NT to connect with new audiences. For the Millennial segment, lockdown has only increased their interest in gardening, as it is seen to have a direct correlation to personal wellness. (Gardens trends report 2019 – Gardenforum).</p>	<p>Great Dixter have been running gardening Master classes for 15 years and are now seen as one of the leading gardens for tuition. www.greatdixter.co.uk</p> <p>Other great course examples are Veg growing at Perch Hill with Sarah Raven. www.sarahraven.com</p> <p>Fruit and Veg growing courses at River Cottage</p>



Tunbridge Wells Product Priority – Opportunities & Gaps

Experience	Lead Opportunity underutilised at present	Product example
Interior Design	The area hosts several leading events throughout the year, such as the Decorative Living Fair at Eridge Park and has a plethora of interior shops in the town and surrounding villages – Tun Wells Interiors, Mink, Skinners, Susie Watson Design and Ensor Interiors based in Frant. Opportunities around interior design courses linking to local restaurants and cafes to offer a design lunch (e.g. Juliet's) or the development of a pop up autumn and winter fair programme around the Pantiles?	One of the most successful examples of a retail outlet that had expanded to offer design courses and events is www.thecountrybrochante.co.uk in Midhurst. Events run all year round.

	Primary Themes	Gaps analysis for selected themes
Tunbridge Wells	Wellbeing	<p>Improving personal wellbeing is something we are all seeking, but often find hard to find. The default product offer is often a spa and wellness day/ short-break.</p> <p>Although Tunbridge Wells can offer this product, expanding to include learning in situ experiences offers greater potential.</p> <p>At present some of the gardens and heritage attractions offer niche gardening courses, these are often targeted at the seasoned gardener. No one really caters for the new gardeners, who are poised to be the next generation of garden lovers/ garden visitors?</p> <p>There is a huge gap in the market, which the independently owned houses could capitalise on to generate income and visitors to the local area out of main season.</p> <p>Accessing rural based activities can however be a challenge and often is to the overseas visitor. This is where transportation companies and small tour operators can offer the links and access to the county's hidden treasures, taking the stress away from the customer by acting as a mobile concierge. At present issues over accessing this type of product from Oct – Mar will hinder product development.</p>



Wellbeing



West Kent - District specific opportunities

Maidstone, Tonbridge and Sevenoaks:

Product Strengths: Heritage, castles, gardens, connectivity to London, agriculture, variety of countryside, rivers and wildlife.

Experience	Lead Opportunity underutilised at present	Product example
Heritage – Behind the scenes	<p>With the high concentration of privately-owned heritage houses there is an opportunity to open up closed doors (out of season) allowing the public access to the restoration and maintenance projects in progress. This is particularly of interest to small private tour operators.</p> <p>Heritage Restoration has to be planned so far in advance that there is also the opportunity to reach out to international cultural establishment alumni travel groups who are keen to include a unique experience in their overall tour -e.g. Smithsonian travel.</p> <p>This doesn't have to be just heritage buildings – this year saw Aston Martin scheduling to open their doors for exclusive public tours www.astonmartinartofliving.com – The automotive industry is a niche interest, however if packages are well formulated they attract a high spending consumer, indicating that there could be development opportunities for Brands Hatch beyond track days.</p>	<p>Liverpool Cathedral behind the scenes tours</p> <p>Painted hall restoration at the Royal Naval college.</p> <p>www.smithsonianjourneys.com</p> <p>www.luxuryvacationsuk.com</p> <p>www.justgoholidays.com</p>
Agricultural calendar	<p>The agricultural cycle is becoming increasingly of interest to the general public, as we strive to be more sustainable by eating seasonal foods and buying local. Invariably some crops and agricultural experiences are becoming very instagramable – lavender fields at Castle Farm, hop gardens in Yalding, orchards, sunflowers, vineyards, pumpkin fields – key moments in the calendar year offer opportunities to develop courses and experiences linking visitors to the land for example; wassail festivals in January, blossom trails in spring, late harvest for hops, apples, grapes and pumpkins. - then associated creative courses for autumn and winter rural crafts. Castle Farm is excellent at capitalising on this. Visitors want to experience the crop first hand and then potentially take it away with them as lavender oil, a hop garland or bottle of cider.</p>	<p>One of the most popular spring travel packages offered by the Mail on Sunday is a five day package to visit local gardens, Adam Hensons farm and Dalesford Organic Farm.</p> <p>www.tstours.co.uk</p>
Outdoor – rivers and the Downs - pilgrimage, walk/ cycle	<p>The countryside between river basin and chalk downs offers a great variation in such a short distance, enhanced by the historical points of interest that take people from Neolithic through Roman/Mediaeval to modern day. Although Lullingstone area is seen as a honeypot with congestion issues in the summer months – autumn/ winter offers space and views. Different ways to see this countryside should also be considered: Kent Gliding Club, flights with a spitfire from Headcorn, balloon flights from Leeds Castle.</p> <p>Exclusive boat trips to secret castles – Allington Castle is a private castle/ venue hire on the river Medway. – www.kentishlady.co.uk</p> <p>Capitalising on the pilgrimage story and key points of interest from Sevenoaks to Charing for the NDW – is of particular interest when linking to the rail connectivity for the route – day walks from train stations.</p>	<p>www.intotheblue.com</p>



Options analysis for North Kent – core strengths

For many domestic and international visitors, North Kent is still undiscovered, even though it has the Dockyard and Dickens; hence the Visitor First destination branding leads on ‘curiosity’ for this area.

Because it is ‘known, yet not known’, developing experience led product creates an opportunity to challenge perceptions, creating the chance to support activity such as the City of Culture Bid for 2025. The area benefits from a range of diverse stories and notable historical characters both fiction and non-fiction that bring the area to life. In addition, the opportunities around the development of the London Resort will profile the area to a family market.

Gravesham is a somewhat forgotten slice of North Kent; the consumers perception is dominated by the riverside town of Gravesend, known as the English home of Pocahontas and for its links to maritime defence heritage. Yet this is very much a district of stories, from the breadth of cultures that have and still do call it home, to the pilgrims that have travelled through its stunning countryside. The multicultural experience offered by the Gurdwara and festivals celebrating calendar events such as Eid or Diwali, all offer a new and engaging opportunity to welcome visitors.

Medway is steeped in history linked to renowned historical figures such as Dickens and Nelson, where visitors can visit their homes, experience themed events and explore the dockyards where ships like the Victory were built. However, because of North Kent’s entrenched alignment to such characters, it can be challenging for new products to break through. This is where a focus on experience rather than visit, offers new opportunities.

Swale has a diverse offering from heritage market towns to marshland with industrial heritage and seaside fun; Its offer breaks down into four key product areas – coastal, heritage, countryside and nature and family. Areas of strength that are gaining recognition are wildlife and countryside, thanks to Elmley Nature Reserve, as well as capitalising on the fruit and hop growing heritage.

Although the smallest of the district councils, **Dartford** has some unique experiences that are known both nationally and internationally. Bluewater is the fifth largest shopping Centre in England and Brands Hatch circuit, which hosted the F1 Grand Prix until 1986, still hosts the GT and British Superbikes.



Fig 1.6



North Kent – product opportunities

Culture and multiculturalism – Although explored in more depth in the district opportunities for Gravesham and Medway, the cultural offer can be the defining component that shifts the consumers preconceived ideas about a destination. Great examples are both Londonderry and Hull and how they are now seen as cultural tourism destinations, following their city of culture years.

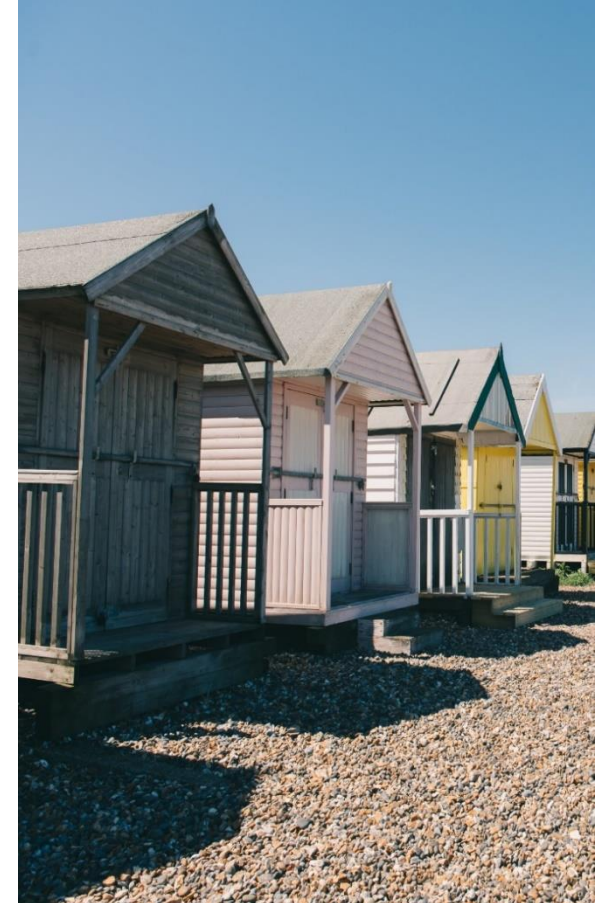
Hidden heritage – North Kent has a wealth of hidden heritage, some are in plain sight like Six Poor Travellers House in Rochester High Street, its purpose was to do exactly what its name suggests, offer board and lodging to six poor travellers. Although accommodation is no longer on offer, as the museum is closed in winter months, there could be the opportunity to offer a dining experience for groups of six? The opportunities around North Kent’s hidden heritage is its ability to be included on an out of London Itinerary, combining these sites with big name tour attractions such as Leeds Castle or Canterbury. Sites such as Hall Place, the low visitor numbers and the opportunity to pre-arrange activity like afternoon tea and private tours, make the experience for a small group visit even more unique.

Photography - The photographic opportunity is three-fold:

Landscape views across the Downs, and along the Saxon Shore Way taking in the historical villages such as Cobham, estuary heritage like Upnor Castle’s and cobbled streets, or getting out into the AONB to discover Neolithic long barrows, known as the Medway megaliths.

Industrial photography – Like the East Kent Coast, the Medway and Swale estuary offer fantastic industrial and defence heritage photographic opportunities, with sites like Cliffe Fort with its decaying ship wrecks, Maunsell forts and Milton Chantry in Gravesend. Although photogenic, these sites are often in hazardous areas that require a boat trip or local tidal knowledge, as a result a guided tour of the sites makes this the ideal bookable experience. At present X-pilot boat trips run excursions to the Maunsell forts.

Wildlife- The consumer recall perception of North Kent is industrial and inhabited, however huge swathes are countryside; Jeskyns Community Wood is 360 acres alone and Elmley on the Isle of Sheppey totals 3300 acres and is one of the top places in Kent to see boxing hares in March.





North Kent – product opportunities

Walking - villages and views of the Downs – The villages along the North Downs Way are bursting with heritage and stories, making them a perfect addition to creating a three-component walking experience - heritage site visit, stunning views and a pub lunch is a winning formula. This type of product uses the appeal of a good story rather than just clocking up the miles to capture the visitor’s attention. Dickens’ literary legacy enables the villages and countryside to easily be brought to life through a guided walking experience. This type of product already has a successful formula in the walking tours of Rochester, Faversham and Gravesend, so the format could be easily adapted for special interest walking tours and potentially pop up walking festivals.

Produce – Farm diversification has considerable potential for North Kent, not only does it reconfirm the high % of green space/ arable land in the area, but it capitalises on the recent trend of food sourcing/ tracing. Also there are some unique growers in the local area such as the UK’s only aronica berry grower and Brogdale, home of the national fruit collection, who already offer unique shoulder season events such as the Hanami festival in mid April and the apple festival in October, this programme could be expanded to include a wassail festival in January. Faversham is already known for its association with hops as the home of Shepherd Neame and the successful Hop Festival, as well as Macknade Fine Foods.





North Kent - Medway – experience product opportunities

Medway:

Product Strengths: Literary giants such as Dickens, maritime heritage, defence in the form of castles and forts, as well as England’s oldest cathedral. The Historic Dockyard Chatham is a great attraction in its own right, but it is also fast becoming known as a destination on the screen tourism trail.

Experience	Lead Opportunity underutilised at present	Product example
<p>Building on literary heritage</p>	<p>Major cultural events are one of the few things that can shift the consumer’s understanding of a destination brand. This has been noted in Liverpool, Londonderry and Hull and has put previously dry tourism areas of London firmly on the map.</p> <p>Capitalising on the authenticity of cultural heritage by giving it a new twist by combining old with new, encourages the visiting audience to a.) - take a second look, and b). - gives them a reason to travel within a set time frame. Great examples are: The Huguenots and street art walking tour of East London, this combines over 300 years of history with modern day street art around Spitalfields.</p> <p>As visitors look for a new way to experience the traditional walking tour, this could be a great opportunity to rethink how visitor engagement on a traditional walking tour can also act as a cultural showcase.</p> <p>The gravitas of Dickens’ international fame should be the perfect platform to showcase the cities’ creative talents. For example; adapting a Dickens tour to showcase Rochester’s new talent at locations like Café Nucleus. The scale of Medway’s heritage sites offers opportunities to transform them into a cultural canvas – Lumiere Festivals are fast becoming the ‘must visit’ January events across the country. The formula is tried and tested in cities like Durham and Liverpool, however Medway has the opportunity to overlay the spoken word from Dickens to the towns’ yet to be discovered talent.</p>	<p>Alternative London walking tours amalgamates key heritage points of interest alongside cutting edge street art to broaden the appeal of the tours, and so delivering the street art story to a wider audience.</p> <p>Pop up Shakespeare – part of the 2012 cultural Olympiad the programme delivering Shakespeare in ordinary places as snippets and tasters, taking it away from the stage and onto the streets once known by the author.</p> <p>Museum of the Moon by Luke Jerram.</p> <p>Sacrilege by Jeremy Deller.</p>
<p>‘Hands on’ maritime</p>	<p>Maritime is such a strong theme for Medway with the appeal of The Historic Dockyard Chatham, but is there the opportunity to take aspects of this attraction and turn them into packaged experiences rather than demonstrations? The ropemakers still operate commercially at Chatham, could this be a bookable experience? Equally build on the trend for outdoor skills development, could the dockyard run day courses in knot tying and lashing, teaching people dockyard skills that they can use in everyday life?</p> <p>Getting involved in maritime restoration projects is also another opportunity.</p>	<p>www.adventure21.co.uk offers knot tying lessons in the Lake District: In the morning you perfect your skills, then after a hearty lunch the group knot together a bridge or raft.</p>
<p>Literary heritage as a foundation for new creativity</p>	<p>As many of the smaller Dickens-based attractions struggle to maintain footfall away from the summer period, there could be an opportunity to introduce a creative writing and good food programme or courses and events. This approach could work to increase off season footfall to sites like Restoration house and also open up new opportunities for Six Poor Travellers House.</p>	<p>Creative writing inspired by Penzance – Airbnb experience duration 2 hours.</p> <p>National Trust creative writing courses at Arlington Court – Inspired by William Blake</p>



Medway – opportunities & gaps

	Primary Themes	Gaps analysis for selected themes
Medway	Culture	<p>Dickens places Medway on the international literary stage, as the author consistently features in the top 10 authors of all time.</p> <p>To encourage repeat visits both during and out of peak season, Medway has to show that it is delivering something new and exciting to entice the visitor. The current Dickens events are a successful formula, which makes them the ideal vehicle to introduce new product to a captive audience.</p> <p>It is this literary heritage alongside the significance of key sites such as Rochester Cathedral, the Castle and The Historic Dockyard that will play a pivotal role as the backdrop to Medway’s City of Culture bid.</p> <p>In preparation for 2025, current product will need to evolve. How can the tourism experiences support this?</p> <p>Introducing new product to an already established, well performing heritage offer, is all about ‘continuing’ the story. Talk about the ‘new’ as well as the past, will help to galvanise the consumers belief in Medway as a cultural destination. Linking the old and the new is vital to reconfirm change. E.g. museum of the moon.</p> <p>Focusing on experiences would give SME’s the opportunity to weave in additional narrative to the towns’ story – e.g. Dickens and the underground art scene or, The Historic Dockyard Chatham as a modern-day film studio.</p> <p>Integrating creative writing workshops with the literary heritage tours is a natural transition and are more readily accepted by the customer, i.e. because of Rochester’s literary credentials, it is more believable that this would be the right place to get involved in a creative writing workshop.</p> <p>Filling the gaps in the first instance is about extending the offer to incorporate something new and reviewing the potential to utilise other heritage attractions such as Upnor Castle as creative as well as heritage spaces.</p> <p>Working with local FE colleges and Universities offers a great opportunity to nurture young talent. Equally, Coventry have just launched a City of Culture apprenticeship scheme aligning to the national apprenticeship programme, to place young people at the core of the delivery. Could there be an opportunity for cultural businesses to offer an apprenticeship role as part of experiences? www.coventry2021.co.uk/get-involved/apprentices</p>



Culture



North Kent - Gravesham Borough experience product opportunities

Gravesham: Product Strengths: Countryside of the North Downs, riverside maritime and defence heritage at Gravesend, Pocahontas, Dickens, historic villages and estates

Experience	Lead Opportunity underutilised at present	Product example
Multiculturalism	<p>Out of the 12 local authorities in Kent, Gravesham has the highest number and proportion of residents from an ethnic minority group accounting for just over one-sixth. This cultural diversity within the population, offers the borough a great opportunity to celebrate its multiculturalism and explore how this strength can benefit the visitor economy.</p> <p>Location visits - The Gudwara is a stunning architectural addition to the Gravesham visitor experience and is currently the largest in Europe. As with all Gudwara, Guru Nanak Darbar is an inclusive and welcoming site of worship offering hospitality and tours to visitors, yet at present these tours are volunteer run and free. At present all temple visits are suspended due to Covid 19. When group tour business can resume there is an opportunity to explore how learnings can be taken from the Neasden Mandir and how this could work for Gravesend.</p> <p>Events and festivals – Multicultural festivals are a mainstay for the year-round London cultural calendar, there could be an opportunity to develop a small scale festival programme incorporating festivals such as Eid, Diwali, Easter, De Los Muertos, Christmas, Passover, Hanukkah and Chinese New Year.</p> <p>Local heroes - Crossing over with the guided tours programme, there is also the opportunity to celebrate leading figures from the community such as Squadron Leader Mahinder Singh Pujji and his significance to the areas military heritage.</p> <p>Target segments -The potential of the ethnic minority travel market offers a huge opportunity for Gravesham. Travel has a reputation for bringing people together yet it is often the ethnic minority community who are missing from the target segment profile. Visibility is key across all destination delivery, where diversity and inclusion can support business growth.</p>	<p>Described as a London landmark and one of London’s 7 wonders, the Shri Swaminarayan Mandir (Hindu Neasden Temple) www.londonmandir.baps.org At present the temple is closed, but major coach operators incorporate visits to the Mandir as part of a day excursion programme from London e.g. Golden Tours</p> <p>Advice and guidance can be sort from organisations such as: www.bftlsn.com and www.womenintravelcic.com</p>
Markets	<p>Gravesend Borough Market – Like all markets housed in an enclosed location, the last six months have proved increasingly difficult for traders. But this could be an opportunity to review the market and test to see if there is a visitor and local resident appetite to change formats/ new ideas. Food markets are a great way to get local people to use the space along with visitors that are ‘in the know’. Although an ambitious model to follow, the Time Out Market in Lisbon is a great model – The focus is food and drink on keys days/ evenings to engage the audience in the current climate they have introduced pop up cooking courses. There could be an opportunity to deliver this type of experience at Borough Market, working with current traders (July 2020) like @justwinenot and @urban.farm.it</p> <p>Partnership potential - If course time slots were scheduled to coincide with the Gravesend – Tilbury Ferry, there could be an opportunity to joint promote to the Tilbury audience with Jet Stream.</p>	<p>Time Out Market Lisboa Timeoutmarket.com @timeoutmarketlisboa</p>



Gravesham Borough experience product opportunities

Experience	Lead Opportunity underutilised at present	Product example
<p>Raising the profile of key attractions through the experience lens</p>	<p>There are a number of key attractions within Gravesham that would directly benefit from being packaged as a more immersive experience to raise their profile.</p> <ul style="list-style-type: none"> • Meopham Vineyard is actually in a prime location for small group tour day excursions out of London. • Cobham Village with access to Cobham Hall, Cobham College and The Leather Bottle inn could offer a guided tour experience which could be a bookable product or used by the travel trade as part of a longer tour. • The extensive woodlands and parks such as Cobham, Shorne, and Jeskyns Community Wood all offer great locations for foraging, walking and personal fitness bootcamps/ days, all of which are of high interest via the Airbnb platform and aren't summer season dependent. • In July 2020, Sustrans published a report indicating a large unmet demand for cycling from ethnic minorities and disadvantaged groups in urban areas, linking to opportunities around multiculturalism and building the destinations appeal to BAME segments, there could be an opportunity to develop a targeted guided cycling experience. 	<p>For example:</p> <p>Opportunities for Gravesham to position Cobham for inclusion in village tours for companies such as www.odysseytraveller.com who already package villages into a tour programme across Britain.</p> <p>www.jackravenbushcraft.co.uk @blackgirlshike were established as a meet up group in 2019</p>
<p>Guided tours programme – town and country</p>	<p>Gravesham has made a significant investment into developing a great guided walks programme, linking key sites of interest in Gravesend. To complement these town based tours, bookable guided rural walks could be developed around key sites of interest such as Cobham College, Cobham Hall and Gad's Hill. These key sites can easily be linked together via the footpath and regional route network, including the North Downs Way.</p> <p>Grabbing the visitor's attention - Product testing the current Gravesend tour programme under different name format such as ghost tours, murder mystery etc could help engage with a wider cross section of visitors. Ghost tours are the most popular themed walking tour in Britain, and there is also an opportunity to raise the profile of such walking tours around Halloween and autumn school holidays.</p> <p>What will help? – a greater emphasis on visual inspiration on Instagram, working with local photographers and bloggers linking and utilising key # for greater reach and engagement.</p>	<p>Walking tours do need to inform and educate, but they also need to entertain, hence the most popular heritage tours are around Ghosts, Famous People or restricted access.</p> <p>Canterbury Ghost Tours</p> <p>Harry Potter tours of Oxford</p> <p>Canterbury Ghost Tours (York, Bath, Salisbury, Edinburgh, Tun Wells) Rotten Ramsgate Tours</p>
<p>Gaming and escape rooms "PLAYCATION"</p>	<p>As gaming continues to grow in popularity, gamers are looking to more than just their consoles and mobile apps for entertainment. Although still a specialised form of travel that is technology dependent, the gamer tourism trend could be an opportunity for the districts game stores, cafes and escape rooms to link together to offer a 'playcation' product.</p>	<p>The market leader here is Japan offering: Professional gamer cafes – Anime pop ups, iconic gamer eateries and geek gaming hotels</p>



Gravesham Borough product priorities – opportunities & gaps

	Primary Themes	Gaps analysis for selected themes
Gravesham	Multi-culturalism	<p>This product area has significant growth potential for Gravesham; the Gravesend Gurdwara has the potential to capitalise on group tour interest similar to that seen with the Neasden Temple (Pre Covid). At present interest is quite localised, however a review of the cultural events programme could engage a wider audience.</p> <p>BIDs across the country use cultural events to create a ‘reason to travel’, where the event encourages visitor footfall into retail areas. E.g. Bath BID ran a ‘De Los Muertos’ festival in October 2019 to offer a cultural alternative to the Halloween retail event – this included pop up Mexican dining, music and screenings of recent children’s films alongside street decoration.</p> <p>A number of cultural events already exist in the district, but to enable this to expand, would require a central events delivery programme reliant on a public/ private sector partnership model.</p>
	Markets	<p>The Market area needs footfall and consumers need a reason to visit beyond just purchasing of items from the stall holders.</p> <p>A ‘canteen social’ event around family dining linking to the cultural events calendar could revitalise this product. Actions that would support this type event would be; free parking scheme for the events days and linked offers with the Gravesend Ferry etc.</p> <p>Equally, the development of a ‘hands on’ food and drink course programme could run on market days, or experiences associated to a wider events calendar; these could include for example, wine tasting and pairing, how to grow your own mushrooms and cooking with mushrooms.</p>



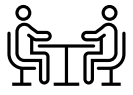
Markets & Multi-Culturalism



North Kent - district specific opportunities

Swale & Dartford: Product Strengths: Produce, heritage brewery, festivals, markets, wildlife and nature reserves, maritime heritage, beaches, North Downs, antiques, heritage town, motor racing, track days, Roman history, Darent Valley, retail destination.

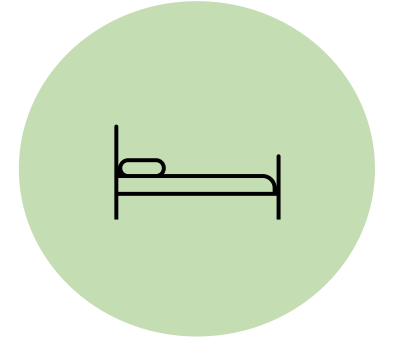
Experience	Lead Opportunity underutilised at present	Product example
<p>Home grown excellence</p>	<p>Brewery tours, national fruit collections, festivals and pop up food experiences are all strengths for Swale. What separates Swale’s offer from the other districts is the heritage behind these products; Macknade Fine Foods was established in 1847, Shepherd Neame was founded 1698 and Brogdale is home to over 4000 varieties of fruit. All currently offer tours and open days, but it’s experiences that the visitors are after. Brogdale already offer an extensive range of courses throughout the year including non-fruit courses. Is there an opportunity for partnership working across these organisations to promote each other’s courses to reach new audiences? Or, now Macknade have a restaurant in Ashford could Brogdale deliver a fruit pop-up? Equally, could a brewery tour be linked to a hop garden visit?</p> <p>Sustainability is the key trend that will introduce a new audience to Swale’s food and drink offer. Gardeners are getting younger and the millennials that are keen to acquire green fingers, want to ensure that their food is seasonal, traceable and sustainable. Established businesses like those highlighted above could partner with new start-ups in the pioneering food movement.</p>	<p>@urban.farm.it who are on a mission to enable anyone to grow food anywhere. Could be a great start up to partner with – Kent based</p>
<p>At one with nature</p>	<p>Benefiting from areas like the North Downs AONB, the Elmley Nature Reserve and Shellness Beach, Swale can offer a fantastic seasonal wildlife experience. The key is to appeal to the Spring and Autumn Watch audience by offering them a guided experience to take them off the sofa and into nature. Combining this with cosy accommodation such as Elmley farm and rural B&B’s.</p> <p>The 2020 series of Spring Watch coincided with lockdown and with four out of every five Britons living in a city or town environment, the nature reality show reconnected over eight million people with the natural world. The development of nature-orientated experiences to coincide with the scheduled programmes could be a fantastic way to extend the season for local accommodation providers.</p>	<p>Companies like www.speysidewildlife.co.uk offer an extensive range of wildlife experiences from week long holidays to day trips and evening wildlife watching.</p>
<p>Unlocking the past/ learn new skills/ go behind the scenes</p>	<p>Gardens – There are several gardens that fall into the Swale/ Dartford area – Hall Place, Mount Ephraim, Belmont House and Doddington Place Gardens, there is a great opportunity to tap into the gardening revival by running head gardener experience days during the spring and autumn period, rose pruning in February and garden design courses in the winter.</p> <p>Behind the scenes – by contrast locations such as Brands Hatch, although still a fully operational track could offer behind the scenes tours on non-track days.</p>	<p>www.greatdixter.co.uk gardening courses www.silverstone-experience.co.uk</p>



Partnership working opportunities

Working with the accommodation sector

All of the experiences highlighted in this document, offer the perfect partnership opportunities to the accommodation sector, to extend their seasonal occupancy. Whether it's a family run B&B that's located minutes from a fossil hunting beach, or a hotel that will provide a stargazing night picnic to accompany their guests on a photography course, the consumer is looking for the seamless service that makes every step of their visit an experience. When the accommodation provider is in-tune with the local experience offer, they add greater value to the customer.



Working with the travel trade

The current environment resulting from Covid-19 has devastated the travel trade. Established organisations such as STA Travel that excelled on their destination knowledge to support their customers have gone, and successful DMC's have shrunk their operations often at the expense of their R&D departments.

When the travel sector starts to return to a 'new normal' the industry will equally be looking for experience-led product to partner with, to kick start their reduced groups market. Over the past few weeks (Aug 2020) there has been a notable uptake in 'bubble bookings' for small experience-based tours that incorporate an element of outdoor/ distanced activity e.g. Vineyard Tours – developing product that is trade as well as consumer ready via platforms such as TXGB will be crucial.



Appendix 1

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 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
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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