

Kent and Medway Tourism Development Framework

Kent County Council
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Final Report



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1. Introduction

In 2006 tourism was worth an estimated £2.5 billion to the Kent and Medway economy. The jobs of almost 50,000 people in Kent and Medway are supported by this tourism expenditure, representing 7% of total employment, but what of the future? How can Kent and Medway ensure that they continue to compete effectively for visitors? Indeed what can and should be done to improve Kent and Medway's competitiveness as a visitor destination? This was the challenge set by the brief for the production of a Kent and Medway Tourism Development Strategy for the next 10 years.

The strategy brief set out ten specific tasks

- 1 Identify what Kent and Medway needs in the next 10–15 years in terms of new tourism product and in this context undertake a particular review of the East Kent tourism offer;
- 2 Examine the potential offered by the Olympics in terms of new product development;
- 3 Explore the tourism potential offered by the Thames Gateway North Kent and Ashford growth areas;
- 4 Investigate the tourism potential and future positioning of Kent resorts and the coast;
- 5 Understand the support that rural areas need to maintain and develop tourism product;
- 6 Research market requirements and identify new tourism trends;
- 7 Identify some key sites and one or two major tourism opportunities;
- 8 Make recommendations to coordinate tourism regeneration at a strategic level;
- 9 Ensure a coordinated approach to developers and investors;
- 10 Consult with partners to agree a co-ordinated approach;



The strategy production steering group subsequently advised that the strategy should focus on;

Coastal Kent – consisting of the local authority areas of Canterbury City Council, Dover, Shepway and Thanet District Councils.

The Growth areas – consisting of the local authority areas of Dartford, Gravesham, Medway and Swale, and of the town of Ashford.

Town and Country areas – consisting of the local authority areas of Maidstone, Sevenoaks, Tonbridge & Malling, Tunbridge Wells, along with the rural part of Ashford Borough.

It should be noted that there is overlap between these sub-areas; the Kent coastline although not including Heart of Kent does encompass many of the growth areas; all of Kent's local authority areas have rural parts, including Coastal Kent. Indeed the Kent Downs AONB spans the whole county starting from the Surrey border and finishing at the White Cliffs of Dover.

We must also remember Kent's unique location being close to London and the continent. We have a special relationship with Nord Pas De Calais which provides many opportunities for tourism development.

1. Kent and Medway Tourism Development Strategy

The definition of tourism used in this strategy follows that adopted by the World Tourism Organisation: "the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes". Visitors are the people who undertake tourism. They are referred to as either staying visitors (those who stay overnight or longer in the place visited), or day visitors.

Tourism development therefore focuses on the range of infrastructure and facilities that might attract or provide for visitors to Kent and Medway – the various forms of overnight accommodation, visitor attractions, events, special interests and themed activities, and the built and natural environment.

The strategy applies to both the areas administered by Kent County Council and Medway Unitary Authority. For brevity the strategy summarises the two areas as Kent rather than repeating Kent and Medway throughout.

2. The starting point – How is Kent performing now?

This part of the strategy assesses how Kent is performing in comparison with a number of destinations in other parts of the country. It also looks at Kent's current tourism infrastructure and at recent and planned tourism and related investment.

2.1 Comparison of tourism volume and value

Using the most recent figures available from the application of the Cambridge or Steam Models¹ to estimate the volume and value of tourism, a comparison has been made between Kent and a number of other English counties. The results are set out in 2 below.

2. Comparison of Tourism Volume and Value

Staying visits (Figures in Millions)	Kent 2006	Devon 2005	Essex 2006	Hampshire 2006	Leicester 2005	Yorkshire 2006
UK overnight trips / nights	4.095/11.952	6.14/27.511	2.415/6.606	4.02/10.948	2.272/3.42	11.6/31
Overseas overnight trips / nights	0.78/5.273	0.45/4	0.517/4.459	0.525/4.185	0.26/2.3	1.19/9.9
Total overnight Trips / nights	4.875/17.225	6.59/31.911	2.932/11.155	4.545/15.133	2.53/5.72	12.79/40.9
UK spend	£525 mn	£1.191mn	£358 mn	£576 mn	£229 mn	£1.644 mn
Overseas spend	£240 mn	£174 mn	£193 mn	£189 mn	£88 mn	£387 mn
Total spend	£765 mn	£1,365 mn	£551mn	£765 mn	£317 mn	£2,031
Spend per trip	£157	£207	£188	£168	£125	£159
Spend per night	£44.41	£42.78	£49.91	£50.55	£55.42	£49.66
Average duration	3.53 nights	4.84 nights	3.8 nights	3.33 nights	2.26 nights	3.2 nights
Day visits	47.735	18.921	34.525	35.857	28	91.84
Total spend	£1,615 mn	£784.5 mn	£1,153 mn	£1,503 mn	£727 mn	£4,104 mn
Spend per day	£33.83	£41.46	£33.39	£41.92	£25.96	£44.69
Total visitor related spend	£2,869 mn	£2,250 mn	£2,458 mn	£2,669 mn	£1,044 mn	£6,135 mn
Population*	1,635,000	1,109,000	1,670,000	1,690,900	924,800	5,107,000
Visitor related spend per head of population	£1,755	£2,027	£1,472	£1,578	£1,129	£1,201

- Population figures include respective unitary authority areas

This indicates that within this group, Kent has the second highest total visitor related spend in real terms behind Yorkshire. When the sizes of the resident populations are taken into account, Kent is again second highest but this time to

¹ The Cambridge and Steam models are computer-based spreadsheet models that produce estimates from existing national and local information of the level of tourism activity within a given area. Comparisons have been based on those areas using similar methodologies that are willing to benchmark

Devon. ***In 2006 the total amount spent by visitors equated to £1,755 for each Kent resident.***

Kent and Medway also perform comparatively well in attracting day visits and generating staying visits by overseas visitors, but less well in terms of staying visitors from the UK and the average amounts spent per trip and per day by both staying and day visitors.

Dividing Kent and Medway's tourism volume and value figures in accordance with the Coastal, Growth Area and Rural sub-regions is difficult. As illustrated in 3 below, using the division by local authority area indicated in the introduction shows that the Growth areas generate the highest visitor spend, followed by Coastal Kent. However, when the figures are adjusted to transfer half each of Canterbury City Council's and Swale and Ashford Borough Councils total visitor spend, the Town and Country sub-region has the highest visitor spend and Coastal Kent the lowest.

3. Kent and Medway – Visitor Spend 2006

Kent and Medway	Visitor spend 2006	Adjusted visitor spend 2006
Coastal	£952,261,200	£772,918,200
Growth areas	£1,081,995,800	£986,447,300
Town & Country	£836,146,100	£1,111,037,600

2.2 Kent's tourism infrastructure

2.2.1 Visitor Accommodation – hotels and other serviced accommodation

There has been a marked shift in the share and spread of visitor accommodation across Kent over the last 20 years. Over that period, the amount of visitor accommodation in the former major Kent coastal resort towns has fallen significantly. Many rural areas such as Sevenoaks have struggled to increase stock while the opposite on the whole has occurred for major towns such as Maidstone.

In Thanet for instance, since 1988 the number of serviced accommodation providers has fallen from 148 businesses to 80. The total number of rooms available in serviced accommodation has fallen from 4,500 in 1988 to 1,500 in 2008 – a decrease of two-thirds.

Many of the properties that closed were independently owned medium-sized hotels which converted to other uses due to a fall in demand. In many cases former hotels have been converted into flats and houses of multiple-occupancy.

In contrast, in 1988 the Borough of Maidstone had 484 rooms in serviced accommodation properties. By 2008, this number had more than doubled to 1150.

The increase in Maidstone is largely accounted for by the building of chain and budget hotels on the edge of town, alongside the M20 and other main roads. On the other hand the number of B&B's in Maidstone Borough has declined – from 49 in 1988 to 26 in 2008.

The majority of larger hotels in Kent are chain-owned and located close to major routes and urban areas which generate demand for corporate business. There are a number of such examples along the M25/M20 corridor – the Hilton Dartford Bridge (M25 junction 1a), the Maidstone-Sevenoaks Holiday Inn (M20 junction 2), Village Maidstone (M20 junction 6), Maidstone Hilton (M20 junction 7), Ramada Hotel and Resort and Marriott Tudor Park (both M20 junction 8), and Ashford International (Q Hotels – M20 junction 9). These seven hotels alone combine to offer a thousand rooms.

Such hotels rely upon corporate business Monday -Thursday – including meetings and conferences – and leisure business at weekends, combined with local demand for leisure and dining facilities and for functions. Recent additions include a 105 room Holiday Inn Express which opened in January 2008, located close to Kent International Airport at Manston and in anticipation of corporate demand arising from the EuroKent and Manston Business Parks. A 100 room Holiday Inn Express has also opened more recently at junction 12 of the M20, near Folkestone. In Medway, a Ramada Encore opened at Chatham Maritime in November 2007. There is a role for these budget named brands which provide good quality and affordable accommodation stock often helping to stimulate demand. However, development needs to be managed so that it is not detrimental to small scale businesses which add to the individual distinctiveness of a destination

Kent and Medway perform less well in terms of the presence of iconic, branded or fashionable serviced accommodation such as boutique or contemporary properties – the sort that feature in independent guide books and help to attract business in their own right. There are a number of exceptions – the Hotel du Vin in Tunbridge Wells, the Abode in Canterbury, Eastwell Manor near Ashford and Chilston Park near Maidstone, and on a smaller-scale, the Relish in Folkestone and Read's Restaurant with rooms near Faversham. There are also emerging several gourmet pubs offering quality accommodation such as The Marquis at Alkham.

According to Quality in Tourism there are 403 graded properties in Kent and Medway - 200 in TN, 126 in CT, 71 in ME and 6 in DA postcodes. It is estimated that there is an additional 71 AA graded properties. Although the number of non quality assessed properties is unknown, it is considered likely that the total number of properties on offer has decreased over a period of time. In 1988 there were 560 such properties listed in the destination guide for Kent².

The long-term decline in Kent's stock of B&B's and guest houses is thought to have occurred for a number of reasons:

- Reduced demand in coastal resorts, which previously sustained a healthy, albeit largely seasonal stock of such properties.
- Given general increases in personal wealth, there is less need for house-owners to supplement their income through providing guest accommodation.
- Competition from new types of accommodation, such as roadside lodges, which offer the benefits of convenience and standardisation.

² "Visit Kent - the Garden of England 1988", Kent County Council

- The impact of the adherence by tourism organisations and destinations to the need for quality assessment and associated perceptions of the 'red tape' involved in providing guest accommodation.

The decline does give some cause for concern. Despite the fact that such accommodation provides much less in the way of bed-stock compared to chain hotels, B&B's and guest houses tend to be more popular with visitors and play an important part in defining the distinctiveness of a place. They are also rooted in local communities and owned and run by people who often serve as ambassadors for their area.

Not surprisingly, B&B's and guest houses tend to be clustered in and around more popular destinations, such as Canterbury and Tunbridge Wells. There are far fewer such properties in Kent Thameside but otherwise a reasonable spread across Kent. They also play an important part in rural areas, where their guests will help to support local businesses, such as pubs and shops. At present 10 B&B's and guest houses and 17 other types of accommodation and attractions are either graded or awaiting grading through the Green Tourism Business Scheme (GTBS).³

2.2.2 Self-Catering Accommodation, Caravan and Camping Sites

Over the last 20 years, there has been a decline overall in **self-catering properties** but much of this has taken place in the coastal resorts. The situation in rural areas has been much more stable over time with some areas seeing an increase through farm diversification.

Analysis indicates that there is a good level of participation in the national quality assessment scheme by providers of self-catering properties with Quality in Tourism having 560 in their scheme broken down into 362 in TN, 139 in CT 44 in ME, 4 in DA and 11 in BR postcodes. To some extent, this has been driven by the insistence on assessment by self-catering agencies. There are four such agencies either based in Kent or offering a large proportion of properties across the area. Together they represent more than 250 individual properties throughout the county.

Self-catering properties in general have adapted over time to also offer short-breaks in addition to one week or longer lets and continue to be an important element of the visitor accommodation mix. Self-catering visitors tend to stay longer and to use local shops, pubs and restaurants, as well as visiting local attractions. Such visitors are particularly important in rural areas, where they also contribute to providing part-time local employment.

Although demand for touring **caravan and camping accommodation** is much more seasonal and weather dependent than serviced and self-catering accommodation, in some areas such accommodation forms a significant part of the local bed-stock. The sector also exhibits similar characteristics to self-catering properties in that such visitors tend to stay longer and spend locally. Over the last few years the market has seen a resurgence which is a trend that is likely to continue in the current economic climate.

In some parts of Kent, particularly on the Isle of Sheppey and around Whitstable/Herne Bay, holiday static caravan (HSCs) sites predominate over

³ The GTBS is the leading sustainable tourism certification scheme in the UK - www.green-business.co.uk

touring sites. HSCs are individually owned static caravans for use by their owners, as opposed to being available to rent. Canterbury City Council's website indicates that there are some 2000 HSCs in the Whitstable/Herne Bay area alone.

2.2.3 Visitor Attractions

Kent's visitor attractions are a key element in making the area unique and distinctive. Consumer research indicates that the strongest associations with the area as potential visitor destination are attractive countryside and gardens, history and heritage. Proximity to the continent is also a factor for potential UK visitors while overseas visitors have also identified the coast as an attraction.⁴

Visitor attractions should not just be considered as stand-alone, paid for entry sites or buildings. They can take many forms and will change and adapt over time. Some are time limited, some are of seasonal interest while others have year round appeal. Others spring from fashion or fads. Examples in Kent are;

- Specific destinations that combine quality townscape with independent, quality places to visit, eat, drink and shop – Canterbury, Rochester, Tunbridge Wells, Tenterden, Whitstable and Deal being examples.
- Unique landscapes – the Kent Downs, High Weald, Romney Marsh, the White Cliffs of Dover, North Kent Marshes, Dungeness Shingle and Thanet's sandy bays and beaches.
- Iconic, genuine heritage – Leeds Castle, Chartwell, Dover Castle, Hever Castle, Penshurst Place, Chatham Historic Dockyard, Canterbury and Rochester Cathedrals.
- Known as the Garden of England throughout the year there are up to 180 gardens open to the public in Kent from internationally renowned Sissinghurst Castle Gardens to small privately owned Goodnestone Park Gardens
- Activity focused facilities such as Dover's cruise terminal, Bluewater shopping centre, Go Ape at Bedgebury Forest and at Leeds Castle.
- Places to stay or eat that are attractions in their own right such as Wheelers at Whitstable
- Major annual or occasional events, from sporting to cultural

While the core of Kent's heritage based visitor attractions has remained fairly constant over time, the map of other types of visitor attractions and popular destinations in Kent has changed over time and will continue to do so. Examples in recent years have included the emergence of Whitstable as a fashionable weekend or short break getaway for Londoners; the changes at the Hop Farm Country Park and at Howletts & Port Lympne that have seen them significantly increase their visitor numbers and profiles; and the opening and huge success of Bluewater, which attracts 27 million visits a year.

⁴ Kent Tourism Perception Research, Arkenford Ltd for Kent Tourism, August 2007.

Visit Britain's Annual Visitor Attractions Survey for 2006⁵ lists 68 Kent and Medway based attractions (of a total of more than 150) which together attracted just over 5.3 million visits that year. Of these, 12 pay for entry attractions had more than 100,000 visits, as shown in Table 4. The total number of visitors to these 12 attractions accounted for just over two thirds of the total number of visits to all 68 attractions which provided visitor figures for 2006.

4. Top Kent and Medway Visitor Attractions – 2006

Visitor attraction	Number of visitors	actual / estimate
Canterbury Cathedral	1,047,380	estimate
Hop Farm Country Park	500,000	estimate
Leeds Castle	413,655	actual
Dover Castle	301,450	actual
Hever Castle	232,851	actual
Bedgebury Pinetum	200,000	estimate
Bewl Water	200,000	estimate
Port Lympne Wild Animal Park	173,620	actual
Romney, Hythe & Dymchurch Railway	160,000	estimate
Chartwell	156,560	actual
Historic Dockyard, Chatham	101,304	actual
South of England Rare Breeds Centre	100,000	estimate
Total	3,586,820	

Table 5 provides a break down by sub-region of the visits to the 68 visitor attractions which took part in Visit Britain's Annual Visitor Attractions Survey for 2006.

5. Visitor attractions attendances split by sub-region of Kent - 2006

Sub-region	Total visitors	% of total
Town and Country	2,960,043	55.6%
Coastal	2,034,599	38.2%
Growth Areas	328,197	6.2%

⁵ Visitor Attractions Trends 2006, Visit Britain, August 2007.

This indicates that attractions based in Kent's inland towns and countryside attract the greatest proportion of visitors, followed by those at the coast and then the growth areas. This again emphasises the importance of the countryside as a key component of Kent's visitor offer.

Analysis of the 81 visitor attractions in membership of the Association of Tourist Attractions in Kent (ATAK) provides an indication of Kent and Medway's strengths from a visitor attraction perspective.

6. Visitor attraction types

Attraction type	Number in ATAK 2008
Country houses and gardens	33
Castles	8
Cathedrals and churches	7
Museums	6
Animal based	6
Themed / activity focused	6
Transport related	5
Specific building based	4
Naval and Military heritage	3
Local produce based	3

Attractions based on the area's historic buildings / gardens and heritage dominate both in terms of the number of attractions and visitors generated. The great majority of attractions are privately owned or owned and operated by charitable and other forms of trust. The National Trust and English Heritage are together responsible for 13 of the visitor attractions in membership of ATAK, along with a range of other smaller properties and sites in Kent and Medway.

In addition to specific built attractions the landscape itself is a key attractor for Kent:

- Kent Coast has one of the longest coastlines in the UK at 350 miles
- 2 Areas of Outstanding Natural Beauty – the Kent Downs(339sq miles/878sq km) and the High Weald (89sq miles/371sq km) covering one third of the county
- 7 RSPB Reserves
- 98 Sites of Special Scientific Interest and 22 international wildlife sites. Kent Wildlife Trust manage 59 Nature Reserves

- 4,200 miles (6,759 km) of paths

The landscape attracts walkers, cyclers and bird watchers as well as people who just want to enjoy the surrounding environment e.g. In 2007 the North Downs Way welcomed 230,000 walkers, Samphire Hoe 100,000 visitors and KCC Country Parks 300,000 visitors. Although many of these are local people there is also a strong visitor opportunity

2.2.4 Sport and Culture

Kent has hosted major sporting and cultural events, which has raised the destinations profile and attracted significant visitor numbers

The Tour De France has come to Kent twice. In 2007 it generated £15 million to the local economy including 95,000 bed nights in the accommodation sector.

The Cyclical British Open Golf Championship returns to Royal St George's next in 2011. The last Open in 2003 generated £17.6 million to the local East Kent economy alone.

There are 97 golf courses in Kent many of which are keen to welcome visitors. Other key sporting venues include Brands Hatch whose international major racing events attracts up to 50,000 spectators, Kent Canterbury Cricket Club which has a capacity for 15,000 spectators with plans for expansion and Folkestone Race Course which holds 20 days of Flat and National Hunt racing.

The regeneration work on the coast has a strong cultural focus. The first Folkestone Triennial was held in summer 2008. This ambitious international visual art project saw artworks by some of the world's leading contemporary artists displayed at key points around the town, in the surrounding countryside and along the coast. A cultural festival cluster in East Kent is forming around this and other key events such as Whitstable Biennial, Broadstairs Folk Week and Canterbury Festival as well as the exhibitions and events programme staged by Turner Contemporary.

Some examples of cultural events in Kent:

Event	Date	Estimated attendance
The Deal Festival of Music and the Arts	July	4500 people
Sevenoaks Summer Festival	June/July	9895 people
Folkestone's Multi-Cultural Festival	June	25000 people
Broadstairs Folk Week	August	100000 to 120000 people
Lounge on the Farm	July	5000 people
The Maidstone Mela	September	7000 people
The Herne Bay Festival	August	53840 people
Big Day Out Gravesham	July	12000-14000
Canterbury Festival	October	72,341

2.2.5 Transport considerations

Accessibility has an important part to play in destination development, perhaps more than ever given the current situation in respect of oil and fuel prices. Kent has the advantage of being relatively easily accessible by road and by rail from the key visitor markets of London and the rest of the south east, and from the near continent by ferry and tunnel. This proximity has meant Kent has developed a special relationship with Nord Pas De Calais and the rest of Europe.

The M25, and M20 and A2/M2/A299 corridors provide good road access to most parts of the county although congestion is often a problem, as are perceptions of the M25 being a barrier and the negative impacts when Operation Stack is in operation

Kent's rail network enables most parts of the county, including rural areas, to be reached by train. However travel times by train to some parts of the county are poor and non rail information provision at stations and connectivity with other bus and taxi services can be lacking. The advent of domestic services on the new high speed line at the end of 2009 will have a major impact on many travel times, particularly to North Kent, Ashford, Canterbury, Dover and Folkestone. The High Speed Service will shrink the county, create more leisure trips, which are today beyond the hour mark and make a dramatic difference to the rural and coastal areas.

With the opening of Ebbsfleet International Station in November 2007, Kent now has two international stations offering Eurostar services to and from the continent. Although the Ashford service was initially reduced when Ebbsfleet opened, some services have been reinstated.

The Channel Tunnel and Dover are significant gateways for both freight and passenger traffic to and from the continent. This has advantages in terms of potential visitor accessibility from the continent but also disadvantages in terms of the volumes of traffic in transit through the area.

The Cross Channel Tourism Study carried out in 2006⁶ indicated that of the 14 million cross Channel passenger trips taken in 2004, 86% pass through Kent en route. This was reflected in the Kent Tourism Perceptions Research⁷ undertaken in 2007, with 73% of respondents being aware of Dover but mainly as a gateway to and from the Continent. Of the 14% of cross Channel trips involving some time spent in Kent, just over half (1.091mn) of trips involved up to a day spent in Kent while just less than half (0.935mn) involved an overnight stay or longer. 4% of cross Channel trips had Kent as their final destination. Plans for further port development include a new marina and ferry terminal as well as significant enhancements to the seafront environment.

While the amount of passenger traffic through Dover has declined in recent years, the use of the port by cruise ships has increased significantly and looks to remain stable in the future even though the port is unable cater for the new breed of larger resort ships. In addition there are smaller cruise opportunities at Sheerness and Tilbury which will benefit North Kent.

⁶ Cross Channel Tourism Study, Arkenford Ltd, December 2006

⁷ Kent Tourism Perceptions Research, ibid

In terms of air travel, limited passenger services are currently available from Kent International Airport and from Lydd. Research into the potential for introducing more passenger services from Manston is currently taking place. The extent of the potential for attracting inbound business will largely depend on decisions on outbound services.

Kent and Medway enjoy an extensive public rights of way network and a number of walking and cycling routes have been established and are well promoted via Explore Kent. The network is undoubtedly a major asset and offers further potential for on-going promotion and development.

2.3 A sub-regional perspective

2.3.1 Coastal Kent

The strategy brief indicated a need to focus on the particular tourism development needs and potential of the Kent coast to the east of the line between Dungeness in the south and Whitstable in the north. This extends to 70 miles (112 kms) of coastline and comprises a chain of larger and smaller towns interspersed with heritage coastline and protected landscapes.

The four main coastal towns of Folkestone, Dover, Margate and Ramsgate share a common heritage of tourism and cross-Channel transport having been major economic drivers. Changes in these sectors of activity have had adverse impacts on each of the towns over a period of time, exacerbated by a range of deep-rooted social deprivation issues.

In terms of tourism, the towns have been hard hit by the long-term decline in the number of UK tourists holidaying in the UK. The amount of visitor accommodation on offer has reduced and there has been under-investment over time in the visitor economy infrastructure. However, in each case, major initiatives are under way to transform the towns' fortunes through regeneration, with the visitor economy identified as playing a key role in future.

2.3.2 Growth Areas

Three of the nine sub-regions that collectively make up the Thames Gateway are in Kent and Medway. These are Kent Thameside, Medway itself, and much of the Borough of Swale, including Sittingbourne and the Isle of Sheppey. In addition to Thames Gateway Kent, the town of Ashford is a designated growth area in the South East England region.

The principle focus within the growth areas is regeneration – the creation of new homes and employment, along with the necessary improvements to infrastructure, including schools and health facilities. In addition the environment is a growing agenda for north Kent authorities with Greening the Gateway established to oversee the delivery of large scale and transformational environmental projects.

The visitor economy already plays a part, to a varying extent, in each of the growth areas. In Kent Thameside, Bluewater attracts around 27 million visits a year and Ebbsfleet International Station now provides Eurostar services to and from the Continent. Medway has long been a visitor destination, particularly for day visitors, focused on Rochester's Cathedral, its Castle, the Dickens festivals and other annual events, and the Historic Dockyard and the new Dickens World attraction in Chatham.

The Isle of Sheppey offers a 'niche market' appeal in the form of bird-watching at Elmley Marshes and southern part of the Island. Ashford has had the benefit of its international station although the frequency of Eurostar services is much reduced since Ebbsfleet opened. Overnight stays en route to Disneyland Paris have generated regular business in recent years and business tourism is also important to the town.

2.3.3 Town and Country

Some 70% of Kent is agricultural land and the two protected landscapes of the Kent Downs and the High Weald Areas of Outstanding Natural Beauty (AONB's) together constitute a third of the land area of Kent and Medway. Kent also has 22 International Wildlife Sites, 102 Sites of Special Scientific Interest and 10 Special Landscape Areas.

The rural dimension to Kent has long been at the heart of the way the county is perceived externally, particularly in the UK, summed up as "the Garden of England". Policies contained in the Kent Downs and High Weald Management Plans reflect the potential of the visitor economy in supporting protected landscapes.

Policies in the 2008 Draft Revisions to the Kent Downs Management Plan for 2009-2014 include "The development of sustainable visitor and tourism facilities will be supported where they lead to a contribution to the local economy, meet the purposes and policies of the AONB and enhance people's enjoyment and understanding of the AONB".

The 2008 Draft Revisions to the High Weald Management Plan includes the objective "to increase opportunities for education and celebration of the character of the AONB", with targets including "joint working between tourism and countryside and arts sectors to develop and promote a programme of AONB events and activities" and "AONB profile raised at all major countryside sites, attractions and visitor information centres".

In both cases, the Management Plans focus on sustainability and on careful and selective approaches to tourism development involving local communities. There are many examples of this approach having been adopted in recent years through specific initiatives in the Mid Kent Downs, Romney Marsh, White Cliffs Countryside, the Stour Valley, Blean Woods and other rural landscapes.

Kent contain a huge number of attractive rural villages and market towns with a strong visitor offer such as Edenbridge, Biddenden, Tenterden, Lenham and Bearsted

2.4 Current Development Plans

A number of identified gaps in the overall visitor offer are being addressed through developments currently under way or anticipated in coming years. Many of these are a part of major regeneration programmes aimed at transforming the economic prospects of areas of Kent and Medway.

2.4.1 Visitor Accommodation – hotels and other serviced accommodation

Generally speaking, the further away from London and the M25, the less the interest in hotel development from major developers / operators. This is reflected in both discussions with developers and in terms of bookings made over time through Conference Kent⁸. There are exceptions to this. Canterbury is seen as a desirable location due to its prominence as a destination and relative under-supply. The Abode Hotel (a refurbishment) opened in 2006 and plans are advanced for the building of a Radisson Hotel as part of the redevelopment of the St Lawrence Ground (Kent County Cricket Club) and a Hotel du Vin on the Tannery site in Canterbury City Centre.

Recent research⁹ into hotel supply and demand in Kent Thameside has indicated that regeneration of the area has the potential to result in the construction of up to a dozen or so hotels, across the 2–4 star range, over the next 15-20 years. Should this go ahead, it would result in a three-fold increase in the hotel room-stock in Kent Thameside. Initial indications are that three sites are presently attracting strong developer interest – at Ebbsfleet, Dartford Bridge and Bluewater. A developer has also been identified for a new 4-star hotel at the western end of the Rochester Riverside redevelopment site as well as a 120 bedroom hotel at Gillingham waterfront, 120 bedroom hotel at Medway Valley Leisure park and a 110 bedroom budget hotel for Corporation Street in Rochester. In Swale several major development sites in Sittingbourne and in Queenborough and Rushenden have also been identified.

The Heart of Kent has seen investment in current accommodation stock, the opening of a new boutique hotel as well as a Travel Lodge. However 93% of areas such as Sevenoaks are designated as green belt precluding hotel development and creating gaps in accommodation provision in West Kent.

A number of sites for potential hotel development have been identified by Kent's local authorities. A handful of these are associated with major regeneration programmes, such as the Rendezvous and Lido sites in Margate, in Ashford Town Centre, at Rochester Riverside and at Ebbsfleet. Locate in Kent¹⁰ has compiled a list of all such sites with a view to attracting developer/operator interest.

Disregarding recent openings, should all of the above mentioned hotel developments take place over the next 5–6 years, Kent's hotel stock will as a result increase by some 1400 rooms. This increase would boost the number of hotel room-nights available by almost 10,000 each week and over half a million over the course of a year. Actual usage would of course be less taking into account the level of occupancy likely to be achieved. In addition in the current economic climate there has been a slow down in development so there maybe a delay in delivery of these plans. There may also be a detrimental impact on existing accommodation providers, which indicates the importance of all concerned needing to grow market demand rather than spread current demand levels across a greater number of suppliers.

⁸ Conference Kent markets more than 50 conference and meetings venues across Kent and is managed by Maidstone Borough Council

⁹ Hotel Solutions - Kent Thameside Hotel Futures Report, May 2007

¹⁰ Locate in Kent is the inward investment agency for Kent and Medway

2.4.2 Self-Catering Accommodation, Caravan and Camping Sites

There are some plans linked to this sector such as the potential development of eco lodges at Elmley, Bewl Water or by the Bay Trust in Dover as well as planning permission being sought to extend some existing camping and caravan sites. Due to the rural location of many of these sites there can be challenges regarding planning permission for such expansions.

Hoseasons, a major national player in the **self-catering** sector, has indicated that there is frustrated demand for medium-scale, quality lodge-style developments in rural areas of Kent. This would indicate an opportunity for public sector partners to pursue such development and to the need to look at ways of providing advice and support to land and property owners, particularly in rural areas.

As many self-catering properties are in rural areas or small towns and villages, the great majority of customers travel to them by car. This is considered unlikely to change. Nevertheless there is a need to look at ways in which car usage after arrival might be reduced or minimised through providing information on and access to walks, cycle routes and public transport. This applies equally to other forms of visitor accommodation.

There is a need to work with current **caravan and camping** site providers to investigate market trends and understand supply and demand issues within Kent. The Caravan Club has previously indicated an interest in looking at adding to their sites portfolio in the area. This would indicate merit in looking at further development potential as part of a sector study.

In some parts of Kent, the scale of provision of Holiday Static Caravans (HSCs) is much greater than the combined serviced and self-catering bed-stock locally, although the extent to which it benefits the local visitor economy is unclear. Again this indicates the need for further research, including understanding the extent to which such accommodation may or may not be important in future. Furthermore such sites can often have high visual impact on the landscape so we need to consider how to reduce this both for existing and new providers.

2.4.3 Visitor Attractions,

It is worth noting that of the twelve visitor attractions listed in Table 4, eleven featured among Kent's top attractions 20 years ago, as featured in the Visit Kent guide from 1988.¹¹ Such major attractions remain important to the Kent offer as a visitor destination and share a number of common characteristics;

- They draw visitors to them through reputation, convenience or profile.
- They offer the potential to act as gateways to other aspects or facilities within the visitor economy.
- They represent a unique aspect of Kent or Medway and/or have strong national and/or international recognition and appeal.
- They generate largely positive media coverage.
- They have spin-off benefits for their local communities.

¹¹ "Visit Kent - The Garden of England 1988", *ibid*

The majority of Kent's leading visitor attractions are heritage and garden based and there has to be a focus on conservation and preservation – Canterbury Cathedral alone are currently fundraising £50 million over the next 5 years for costly work needed to conserve the stonemasonry, stained glass windows and lead roof.

In addition major successful visitor attractions need to constantly adapt their offer to appeal to new and repeat visitors. It will be important for Kent's major attractions to continue to do so in future. The role of visitor attractions in terms of further developing the visitor economy in Kent and Medway needs to be looked at in two ways.

- ❖ Through a focus on nurturing existing key attractions with a view to sustaining and enhancing their 'visitor appeal'. This should include looking at a range of green issues to also enhance the sustainability of the attractions.
- ❖ The need to add selectively to the range of attractions to continually refresh Kent's visitor appeal. Sustainability in all its forms – financially and operationally - should be a key consideration in helping to guide investment decisions.

There are currently a number of new visitor attractions in the making:

- Chiddingstone Castle through the setting up of a trust opened in Easter 2008
- The Turner Contemporary Gallery, is expected to change the appeal of Margate, the Dreamland Trust has unveiled its plans to establish the world's first heritage amusement park in Margate, on the site of the former Dreamland Amusement Park.
- In Dover, the Sea Sports Centre is nearing completion and will be officially opened in 2009 providing a new seafront hub for water sports activity.
- The new Siri Guru Nanak Durbar Gurdwara opening in April 2009 in Gravesend will be the largest Sikh temple in the UK and it is anticipated that it will attract visitors from around the world.
- An exciting £14 million project will transform the Smitheries into the 'National Museum at Chatham' and include collections from the National Maritime Museum and Imperial War Museum.
- The 19th Century Beaney museum and art gallery in Canterbury is to be restored and extended with the help of a £6.5m Heritage Lottery grant. And the redevelopment of the Marlowe Theatre will add to Canterbury's potential to generate cultural tourism.
- The White Horse landmark sculpture at Ebbsfleet

In addition investment in public realm and transport will open up new areas and add value to the visitor experience.

2.5 A sub-regional perspective

2.5.1 Coastal Kent

Major regeneration programmes are being progressed in Dover, Folkestone and Margate. A 30 year master plan for Dover¹² was produced in 2006 which has a strong focus on future port facilities and complimentary seafront development. One of the first projects to come to fruition will be a new Sea Sports Centre, which will reinforce Dover's future potential to attract special interest visitors. The town has also been awarded £3.8 million from the DCMS' "Sea Change" Programme to improve connections between the harbour and Dover Castle and for additional improvements in and around the Castle.

In Folkestone, the work of the Creative Foundation has already led to the establishment of a Creative Quarter around the Old High Street, a Folkestone Performing Arts and Business Centre to embed creativity within further education and economic development, and the staging in 2008 of the first 'Triennial' event. There is still much to be done to transform Folkestone's Harbour and seafront but a master plan has been produced and will be taken forward over coming years.

In Margate, plans for the new Turner Contemporary Gallery with ground preparation work started and the Gallery opening towards the end of 2011. A development partner is being sought for the adjoining Rendezvous site and site specific plans are being made and progressed for other key sites, including Dreamland / Arlington, which is planned to include a Heritage Funfair Rides style theme park.

It is encouraging that from a future visitor perspective each of the main coastal towns is focusing on differentiating its core offer to potential visitors. This differentiation needs to be maintained in future tourism development but there are also common challenges that need to be effectively addressed by each of them, such as the need for high quality design in new development, the quality and maintenance of the public realm, and improving connectivity between their offers as destinations.

Tourism development issues facing East Kent's smaller coastal towns are perhaps less acute but more varied. Whitstable, Broadstairs and Deal are relatively successful destinations and the development challenge will be to enhance their appeal. Visitor perception research¹³ indicates that other small coastal towns such as Hythe, Romney and Sandwich suffer from lack of visitor awareness but nevertheless have the right mix of characteristics to develop further. An important element in this respect is local distinctiveness, for instance through the presence of smaller, family-run shops, restaurants and other businesses that create a distinct offer and appeal. Business Link Kent may be in a position to help to foster and support such development.

Destinations that rely on their reputation need to maintain and improve quality standards to help protect and enhance their destination brands. Visitor economy 'software' elements such as events and customer service assume greater importance in such circumstances. Nevertheless each of the towns will have its

¹² "Dover Masterplan 2006" - Urban Practitioners (see www.doverpride.org.uk)

¹³ Kent Tourism Perceptions Research, *ibid*

own needs, challenges and opportunities. In Herne Bay, for instance, much needs to be done to improve the connectivity between the town centre and seafront.

One of the key challenges to face in terms of tourism development in the coastal areas is to arrive at a position where the towns combine to attract greater visitor interest rather than compete in the same markets. In essence this is about the whole needing to be greater than the sum of the parts. A start has been made in the form of the establishment of the Visitor Economy of Coastal Kent (VECK) group and the appointment of a dedicated officer in September 2007. This has led to initial identification of shared assets such as cultural tourism facilities and sports tourism opportunities (e.g. the Golf Coast) but this approach needs maintaining and building upon.

In each of these examples, the potential development of the visitor economy is an important consideration but the developments also need to work at a place-making level. They are as much about improving the coastal towns as places to live and work as they are about improving them as places to visit.

2.5.2 Growth Areas

Major regeneration is also taking place in **Thames Gateway Kent** and in **Ashford**. The results are likely to include a strengthened visitor economy, with new hotels and other visitor focused facilities as well as the creation of places that are likely to attract visitor interest.

In each case, the key to future development of their respective visitor economies will arise from tourism development potential and opportunity being taken into full account in wider and more comprehensive regeneration programmes.

Working from west to east in Thames Gateway Kent, the Bridge development alongside the Dartford Crossing includes provision for a 3–4 star hotel which has now secured developer interest. Bluewater and Ebbsfleet have also been identified as offering strong hotel development potential, with confirmed developer / operator interest in Ebbsfleet also including major facilities for business tourism. The winning design in a competition to create a landmark sculpture to be located at Ebbsfleet close to the A2 is a giant White Horse designed by artist Mark Wallinger and is expected to be completed in 2011.

There are also major regeneration plans for Dartford and Gravesend town centres, along with opportunities to develop visitor interest in developments such as the new £11mn Gurdwara (Sikh Temple) and Charles Dickens former home at Gads Hill.

In Medway, plans for Rochester Riverside include the development of three hotels – a 120 bedroom hotel at Gillingham waterfront, a 120 bedroom hotel at Medway Valley Leisure Park and a 100 bedroom budget hotel for Corporation Street in Rochester. Longer-term the plans for Chatham Waterfront include aspirations for a Theatre / Auditorium and prospectively further hotel accommodation.

In Swale there are plans for development of the Sittingbourne town centre, Queenborough and Rushenden and Faversham Creek all of which will all enhance the public realm and support the visitor economy

In Ashford, the Ashford International Hotel recently underwent a major refurbishment programme following its acquisition by Q Hotels. Planning approval

has also been given for a new hotel as part of the Victoria Road development in the town centre and plans are being progressed to develop the town's sports tourism potential focused on the Julie Rose Stadium and Conningbrook Lakes. Following a study in 2006, the potential for Ashford to host a multi-functional arena / performance and exhibition space is also being pursued.

2.5.3 Town and Country

Market perception research indicates that Kent's countryside remains a key motivator for visits to the county. This would indicate that there is excellent potential for further, selective rural tourism development initiatives driven by and involving local communities.

While there has been joint working between landscape protection and tourism interests, this has largely been focused on joint work to promote the Kent countryside to potential visitors. There has been little specific attention given to agreeing rural tourism development priorities. Given the current review of the Kent Downs and High Weald AONB's Management Plans, it is timely to perhaps give this some further consideration. Factors to be considered include:

- The majority of visits to the countryside are made by car.
- The challenge of visitor management at popular countryside sites.
- Local communities may not always embrace the prospect of additional tourism.
- Encouraging tourism in the countryside can have negative repercussions – increased traffic on country roads, litter, high impact leisure pursuits such as 4-wheel driving, inappropriate behaviour and the impact on local wildlife, etc.
- Visitor expenditure helps to support rural businesses and facilities and provide employment for local people.
- The specific role and opportunities associated with countryside 'gateways', such as country parks, visitor centres or rural towns and villages themselves.

The aim should be to enhance and protect – not detract and damage. This may preclude the prospect of major or large-scale development in favour of small-scale development in harmony with the rural environment. Proposals to develop a 'Center Parks' style holiday village in West Wood, near Lyminge, in the 1990's, foundered largely on the basis of sustained opposition from the environmental lobby. Nevertheless such developments have proceeded in rural areas elsewhere and have been acknowledged for the sustainable approach taken to their construction and operation.

The experience of the Kent Rural Towns Programme¹⁴ would indicate a growing appetite for community led tourism development as a way to improve local economic viability. Community led tourism is about the local community assessing their own area's potential for developing tourism and then taking forward specific projects. Nationally the approach has been championed by "Hidden Britain"¹⁵. Such an approach is understood to be working well in

¹⁴ The Kent Rural Towns Programme advises and supports small rural towns in Kent and Medway -

¹⁵ 'Hidden Britain' is a charity-run initiative to encourage tourism, to uncover lesser known areas of the countryside, and to provide a different and more meaningful experience for the visitor.

Edenbridge, Westerham, Chilham and St Margaret's at present as well as Cranbrook Tourism Development Forum and ought to be assessed for potential application in other rural towns and the possibility of linking projects through a "Hidden Kent" network. There may also be opportunities to obtain funding support for selective tourism development projects in the designated Leader Programme areas of the Kent Downs and Marshes, and West Kent. It is likely however that an additional focus on rural tourism development will require dedicated staff resources.

Actual tourism development proposals for the rural areas of Kent and Medway appear to be relatively modest at present. The Hop Farm Family Park at Paddock Wood has obtained planning permission for the development of 64 self-catering lodges but it is understood that this is currently on hold with focus on other developments to the attraction

A new 'Go Ape' facility opened at Leeds Castle in March 2008 to add to the one which opened at Bedgebury Forest in 2007. The George Hotel at Cranbrook has been refurbished recently and the National Trust's Scotney Castle Gardens at Lamberhurst are undergoing work including the development of a new visitor restaurant. In addition there has been the Opening of Lullingstone World Garden in 2005, Chiddingstone Castle in 2008 and reopening of Yalding Organic Garden. Lapland UK which first opened at Bedgebury in 2007 and was then committed to Bewl Water for 2008 and 2009 has been very successful and there are major plans for further development at Bewl.

2.5.4 Tourism Investment Monitor

A Tourism Investment Monitor is kept by Kent County Council which is intended to track the investment made in the past 12 months and anticipated over the next five years or so. A breakdown of current investment levels is provided in table 5.

Table 5. Recent and anticipated Investment in tourism development and related projects

Sub-region	Recent / anticipated total investment – £ millions
Coastal	£42.76
Growth areas	£72.73
Town and Country	£25
Total for Kent	£140.49

These levels of investment do not take into account recent and planned schemes to redevelop a number of town centres across Kent.

3. National Tourism Development Trends

3.1 Introduction

A number of factors will determine which tourism and leisure products will be popular in future, as well as those which are likely to decline in popularity. Key amongst these are changes in the population and in the drivers of consumer demand for tourism products and experiences. Appendix 1 provides more information on the trends summarised below.

Tourism has been undergoing rapid change¹⁶. The number of people taking long holidays at home has been in long-term decline as the number of holidays taken abroad has risen. Those taking long holidays at home have increasingly been demanding self-catering (as opposed to hotels and B&B's) in attractive rural areas (as opposed to coastal resorts). The low cost budget airlines have had a huge outbound tourism impact and a growing inbound potential, which Kent should be well placed to take advantage of given the proximity Gatwick, Stansted and London City airports as well as prospective developments at Kent International Airport and at Lydd.

The number of short breaks taken by UK residents has grown, especially to the advantage of cities, and is also of importance to Kent and Medway. Even more dramatic has been the increase in visits to friends and relatives (VFR).

Business tourism has also expanded at a rapid pace in line with recent growth in the economy prior to the current slow-down. This has worked to the benefit of urban or near-urban destinations. Day visits continue to increase and represent the majority of trips to Kent and to other destinations. However recent years have seen a huge growth in day trips to non-traditional forms of attraction – shopping centres such as Bluewater have become destinations in their own right, combining shopping with a range of leisure opportunities such as places to eat and cinemas.

3.2 Key Visitor Market and Tourism Development Trends

Key trends are:

- Changes in working lives that are leading to people taking shorter holidays, more often and booked at the last minute, with people seeking more flexible experiences tailored to their individual interests and needs.
- People are becoming increasingly more sophisticated, well-travelled and discerning, demanding better quality and service and looking for more rewarding experiences.
- Concerns about the environmental impact of flying. The carbon footprint of holidays etc may start to persuade more UK consumers to holiday at home in future.
- Increased willingness to pay for quality, convenience and flexibility and increased trading up to luxury and 'special' experiences.
- Eating out and shopping have become leisure activities.

¹⁶ "Facts About UK Domestic Tourism", British Resorts and Destinations, 2008 (www.britishresorts.co.uk) , "Key Tourism Facts" and "Trends and Forecasts", Visit Britain, 2008 (www.touristtrade.org.uk)

- Demands for activity based holidays, such as walking, cycling and more extreme activities are increasing.
- A move away from packages to individual leisure experiences, which is being demonstrated nationally in a sharp drop in tourists on group 'holiday tours'.
- Health and Well being
- Significant growth in cultural tourism reflected by increased attendances at cultural events.
- Ever increasing use of the internet by consumers to research and purchase tourism products, and by destinations to target potential visitors.
- The development of branded boutique and town-house hotel accommodation in towns and smaller sized cities, fuelled principally by business tourism and short and weekend breaks.
- The development of resort hotels, typically with golf course(s) and spas, increasingly with adjacent villas for purchase or fractional ownership, normally within fairly easy reach of urban areas, which rely on a combination of business (in this case, meetings and conferences) and leisure trade.
- Major new cultural facilities as key elements of economic development and urban regeneration strategies as well as key elements of local cultural and visitor economy strategies.
- The competition from residential developers for development sites that might otherwise accommodate new hotels or tourist attractions.
- Increased diversification of traditional visitor attractions aimed at strengthening their appeal and repeat visits potential, through the development of new facilities, activities, events etc

It is much more difficult to forecast with any degree of confidence longer-term trends and their implications in terms of future tourism development strategy and investment needs for Kent. The visitor economy is influenced strongly by the state of the broader economy, with the credit crunch, rising fuel and other prices and the strength of the Euro all exerting influence at present. This highlights the need for continued research and monitoring of population, visitor market and tourism product development trends. Over the short to medium term, however, research indicates that nationally there will be continued expansion of demand for short breaks – particularly focused on special interests – and continued growth in the business visits market.

3.2.1 Short breaks and business tourism

According to market research by MINTEL¹⁷, the short break is increasingly the holiday of choice for the cash rich, time poor, domestic tourist and changing demographics, such as the continued expansion of the middle classes and the 45–54 age groups will ensure this trend continues. International flight security, sustainability and climate change may also mean a growth in domestic tourism. This will also impact on demand for short breaks.

¹⁷ "Short Breaks Market Report", Research and Markets, 2006, and "City and Short Breaks - UK", MINTEL, 2006.

Business visits, people visiting places for conferences, exhibitions, and business meetings in the UK continue to grow significantly. Although this has been affected by the current economic downturn, the World Tourism Organisation predicts¹⁸ business travel to rise at a faster rate than leisure travel until 2010 and events (business, sporting and cultural) are likely to be one of the main beneficiaries of the London 2012 Games. Research carried out on behalf of the British Association of Conference Destinations (BACD)¹⁹ in 2007 valued the business tourism sector at more than £22 billion.

A 2008 report by Visit Britain²⁰ also indicates that;

- up to 40% of business travellers may return as leisure travellers
- business visits offer a much more favourable seasonal platform than leisure tourism, supporting the retention of staff year round for instance
- business visitors have the highest spend per day of any sector

Conferences, exhibitions, incentive travel, corporate hospitality, outdoor events and individual business travel now account for a growing share of both domestic and inbound tourism in the UK. In 2007 expenditure by business visitors represented 29% of all inbound spend. The expenditure by business visitors makes a significant contribution to the leisure economy, nationally and locally, and to the overall economic well-being and prosperity of communities.

3.2.2 A sub-regional perspective

In **coastal areas** there is now a recognition that the future prosperity of resort communities will depend not only on tourism activity but on strengthening the local economy to provide additional employment and wealth creating opportunities for local residents. For example, in Wales the coastal tourism strategy²¹ has recognised that successful regeneration schemes will depend on the delivery of an integrated package of support from the public/private/voluntary sectors, tailored to the needs of each resort. Improving accommodation and environmental quality, beach management and integrated transport will be crucial to ensure that resorts adapt to meet the changing needs of the market.

There is also recognition that coastal towns that are great places to live and work are more attractive to visitor, notable examples being Blackpool, Scarborough, Hastings and Torquay. The natural environment advantages of coastal towns need to be supplemented by them being able to offer quality housing and employment opportunities, well managed and attractive centres and seafronts, and a range of leisure facilities and opportunities.

A major trend in **growth areas** is the development of specialist tourism and leisure and recreation facilities in or adjacent to city or town centres. Good examples are the new Xscape snow adventure sports centres in Milton Keynes, Wakefield and Glasgow, where they are located alongside or integrated with new retail and entertainment centres.

¹⁸ "The Role of Business Visits and Events in Destination Management", Kenny Boyle, Visit Britain, TMI Hot Topic event, London, May 2008

¹⁹ British Conference Venues Survey 2007, The Right Solutions Ltd on behalf of BACD

²⁰ "Foresight" Issue 55, May 2008, Visit Britain.

²¹ "Coastal Tourism Strategy", Welsh Tourist Board, 2007.

Such investments are contributing to the development of a new sense of place in many formerly run down and economically at risk towns and cities as a deliberate act of policy as is planned in the North West²² where the RDA is promoting a number of sports, leisure and entertainment facilities as “signature projects”.

A key element of this new sense of place is the recognition of the value of the urban public realm as a “stage” for events and programmes, such as in London’s South Bank, the Pier Head area in Liverpool, and the events planned for the area around Kings Cross/St Pancras in Central London. Cultural capital is seen as key to the visitor economy as demonstrated in the success of Liverpool’s Year of Culture2008.

The importance of tourism to the economies of **town and country** areas was highlighted during the foot and mouth crisis in 2001 when many rural areas suffered more from the impact of reduced tourism activity than from the direct impact on agriculture. Tourism is an important contributor to rural economies and development trends reflect environmental and other concerns around sustainability.

Tourism development in rural areas tends to be on a smaller-scale, in harmony with the landscape and natural environment. The Kent Downs Rural Advisory service is an example of a tool kit providing support for farm diversification. There are exceptions to this. Developments such as the four large-scale Center Parks holiday villages in Cumbria, Nottinghamshire, Suffolk and Wiltshire make a virtue of their commitment to the environment. A more recent example is Bluestone, a development of 186 lodges and associated leisure facilities in the Pembrokeshire Coast National Park. Other examples are provided in Sections 3 and 4 of the Appendices.

There are many examples of food and drink based products and events, such as the Ludlow Marches Food & Drink Festival held over three days in September. Such events are capitalising on the burgeoning consumer interest in local food and drink and farmers markets, linked to the on-going popularity of cookery based programmes and publications.

Many tourism developments in rural areas are activity focused, whether on one or more usually a range of activities. There are 17 Go Ape high wire adventure courses in UK forest locations, including 2 in Kent. Websites such as freshweekends.com offer a range of activity and special interest breaks, many rurally based, ranging from wine tasting at a vineyard to falconry and garden design.

Activities such as walking, cycling and horse-riding remain important ingredients of the rural offer to visitors. The “Walking Pages” website lists 26 walking festivals taking place throughout England in 2008 and search engines indicate that there are numerous companies offering walking and cycling short breaks.

Farm diversification continues to be encouraged with visitor accommodation one of the main alternative uses for redundant farm buildings although there are some challenges with planning. This trend looks set to continue through the implementation of the Rural Development Programme for England although the

²² “North West Tourism Strategy”, 2007 update, NDRDA.

3.3 Key Ingredients of Successful Visitor Destinations

A number of key ingredients have been identified based on Locum's work elsewhere and examination of the examples identified in the Appendices.

3.3.1 Strategic Focus

Experience in places such as Southwold in Suffolk, Southport in Lancashire, and Brighton and Bognor Regis in Sussex, has demonstrated the need for a strategic focus on their development as successful destinations. This means being clear on what the offer and experience of the place is and who it is for – targeting potential visitors in priority groups (such as those in particular market segments). A necessary consequence of such thinking is to be strategic about both public and private sector investment in support of the development of the planned offer and experience. It also requires a precise focus on seeking out exactly the right kinds of investor or attraction to locate development in the place or area.

3.3.2 Recognise the Power of Major Attractions

As is demonstrated by a range of places like Lincoln, Gateshead, St Ives and Edinburgh, destinations with major attractors can act as magnets for visitors as well as providers of complementary support facilities, services and events. Places with such attractors need to nurture them and ensure that they remain attractive to their markets as their decline or loss would have significant economic impact and potentially negative consequences. Places that develop significant new attractions need to develop new or upgraded facilities around them to offer services and a fuller experience to the visitors attracted to them.

3.3.3 Sense of Place

Destinations – villages, towns and cities – that feel like authentic places are more successful at attracting people to live and to visit. This means places that have a history that is of interest to people, the look and feel of communities that have buildings of interest that people may wish to visit, that have events and programmes to participate in that relate to their culture, heritage and offer of services. They are places that people find easier to describe as experiences, as places they enjoyed being in and sampling. Arts and Culture, offer a means of creating tomorrow's heritage and in so doing continuously refresh and reinvigorate this sense of place.

3.3.4 Good to live in – therefore good to visit

Destinations that are attractive and look and feel like they are lived in are more likely to attract visitors than those which look or feel down at heel, disadvantaged, neglected or starved of investment. Good places in which to live are those that get the basics right – well kept, clean streets and buildings; attractive public spaces; a good range and quality of places to eat and drink; well managed and safe public realm and plenty going on.

Places which actively improve and increase their housing stock and places which renew their economic base, provide new jobs and help to train unemployed people will be places that feel more vibrant. Such places are more likely to be of interest to potential visitors, especially so where they have a rich cultural heritage or attractions that are unique or otherwise special.

3.3.5 Build on and integrate with infrastructure and environmental improvement, regeneration, cultural and arts and entertainment initiatives

Destinations that complement their traditional offers of facilities and events with modernisation of their infrastructure, improvements to their built environment, regeneration of their economic base and the addition of new cultural and entertainment facilities, are more likely to survive and prosper.

3.3.6 Well designed and managed public realm

Destinations that have a well designed and well managed public realm are more attractive to both their residents and to visitors. A public realm that is poorly designed, unwelcoming, badly maintained and in a state of decay is off-putting and likely to drive away visitors who will not wish to spend time or money in the place.

A public realm that is full of life throughout the day and which plays a vital part in secure, safe and well managed evening and late night economies, will attract and retain visitors and help to maximise their spend in the place. Good examples of destinations with attractive public realm areas are Brighton, Stornoway in the Outer Hebrides, Bexhill seafront in Sussex, Swansea, London's Southbank, the Cathedral Quarter in Belfast, Cardiff city centre, and central Manchester.

3.3.7 Events and programmes

Destinations that are alive and which have a buzz achieve this largely through their events and performance programmes. These are often staged or held in their public realm but also in purpose designed facilities, ranging from pub to theatres through to new forms of concert hall and live music venues, and often part of specialist festivals. Good examples of such places and events are the book festival at Ross on Wye, the Wigtown Book Town programme in Scotland, the Cricklade Town festival, the Marlow Town Regatta and Festival, the Bedford Festival, the Swanage Folk Festival and the Edinburgh Festival. The emergence of a well established network of contemporary and diverse music festivals has the potential to provide a quality cultural experience to UK and international visitors while helping to strengthen local supply chains.

3.3.8 An attractive natural environment

Destinations with attractive scenery remain popular with both domestic and overseas visitors. A 2008 Holiday Report on the travel plans of the UK online audience produced by Continental Research²³ indicates that the popularity of the UK for short break holidays has grown in recent years with many mentioning the great scenery (56%) as a major factor. Scenic destinations such as the Lake District and parts of Scotland, Yorkshire, the South West and Wales continue to be popular for short breaks. Each of these focuses strongly on their scenery and on the quality and accessibility of the countryside. The Kent countryside is one of the county's strongest assets as a destination and therefore points to the opportunity to exploit sensitively areas such as the Kent Downs, High Weald, North Kent Marshes, Natural East Kent and heritage coast including activities such as walking, cycling and wildlife tourism.

²³ "Travel Mole" website feature, 28 May 2008

3.3.9 The Competition

Understanding the nature and location of the competition for the area's offer is of vital importance. KCC's own research²⁴ indicates that the immediate competition for day trips, geographically speaking, is the offer of London and high-profile places such as Brighton. For short breaks, KCC's research indicates that the competition is further afield, in places such as the Lake District, Yorkshire, Wales and Cornwall. Data produced by Continental Research²⁵ shows that the South West (Devon, Cornwall and Scilly Isles) is by far the most favoured domestic holiday destination with 35% of respondents heading there in 2008 for a main holiday or short break. Other popular regions are Wales (19%), Somerset and Dorset (18%), Scotland (18%), Yorkshire (13%) and the Lake District (11%). However, with the advent of the budget airlines and the growth in the attractiveness of short-stay city breaks in the rest of the UK and in mainland Europe, the competition is now much more widespread for certain groups in the market such as the young and the retired. Indeed the cross channel traffic shows that majority of people are outbound rather than inbound and demonstrate how by working with our French tourism partners we can turn this competition into an opportunity.

²⁴ Kent Tourism Perception Research, *ibid*

²⁵ Travel Mole, *ibid*

4. Tourism development priorities and actions

4.1 An action focused strategy

Preceding analysis indicates that Kent is performing relatively well in comparison with a range of other English destinations. The purpose of the tourism development framework should be to identify the improvements and developments needed to further enhance Kent's future performance as a visitor destination.

The strategy brief sets a number of linked tasks, each concerned with a particular aspect of tourism development, whether area, opportunity or challenge based. It is recommended that the best way to deal with the tasks set will be through an action focused strategy based around a number of integrated objectives.

4.1.1 Strategic objectives

These are;

- ❖ Helping existing businesses improve their performance and develop further, in line with evolving market requirements;
- ❖ Identifying, encouraging and supporting additional visitor economy businesses and facilities that will enhance Kent's attractiveness as a destination and increase market penetration, particularly through generating more staying visits;
- ❖ Making the most of opportunities for visitor economy development afforded by on-going investment in regeneration programmes and projects;
- ❖ Capitalising on high profile, international events including the British Open Golf Championship, the opening of Turner Contemporary, the White Horse Landmark Sculpture and second Triennial in 2011, London Olympics in 2012 and prospective future visits of the Tour de France;
- ❖ Focusing on local distinctiveness to enable Kent and its individual destinations to stand out from the crowd but also combine to offer a range of complimentary offers to potential visitors;
- ❖ Ensuring that key public and private sector players work together as effectively as possible towards achieving agreed tourism development priorities;
- ❖ Improving the skills of people who work in Kent's tourism industry and the quality of welcome and service received by visitors;
- ❖ Delivering and sustaining a quality tourism product for visitors.

Sustainability is a unifying thread throughout the strategy. In destination development terms, sustainability is about taking full and equal account of the needs and interests of visitors, tourism businesses, the communities in which they are based, and the environment in which tourism takes place and on which future tourism wellbeing depends. This approach is known as the VICE model for

sustainable destination management²⁶, based on the interaction between visitors, the industry, the community and the environment.

4.2 Kent as a visitor destination in 2020 – a vision

The Vision - Kent as a visitor destination in 2020

Collectively, the objectives and associated actions are aimed at turning Kent into a visitor destination of excellence, as outlined in the vision for 2020. This has been developed in the context of The Kent Partnership's Vision for Kent²⁷, which includes the long-term goal of Kent being "an attractive place in which tourism and leisure is developed in a structured and sustainable way".

"In 2020 Kent and Medway will be widely acknowledged as one of the most successful and dynamic visitor economies in the country. A sustained, structured approach to visitor economy development will have seen consistent growth in visitor expenditure and the number of jobs supported.

Its success is based on the growth of short breaks business. It is a destination that is easy to find out about and to book; easy to get to and around; has a burgeoning reputation for quality places to stay and to visit; known for its rich heritage and as a hot spot for contemporary art; an outstanding natural environment and public realm.

The visitor accommodation stock in Kent will be significantly increased with a high number of individual, high quality small and medium-sized hotels, which are distinctive in their offering and regarded as the best in their field. There will be a resurgence of interest in developing small scale family B&Bs as well as eco-lodges due to the encouragement and support on offer and the opportunities presented by the events and festivals which take place regularly across Kent.

Its visitor appeal is rooted in being a highly desirable area in which to live and work. The growth in short breaks has mostly been driven by visitors from London and near Europe, many of them travelling by public transport. Visitors from the near Continent have discovered that Kent is worth stopping in rather than travelling through. From further afield, visits from China and India have seen the most significant growth, particularly noticeable at Kent and Medway's iconic attractions.

Success will not have been achieved at the expense of the environment or local communities, since the principles of sustainability have underpinned the growth in the visitor economy. Indeed Kent and Medway have become a benchmark destination for putting sustainable tourism into practice.

In Thames Gateway Kent, the Bluewater / Ebbsfleet International / Medway axis has seen the Thames and Medway riverside environments transformed. A

²⁶ Destination Management Handbook, English Tourist Board and Tourism Management Institute, 2003.

²⁷ "Vision for Kent - Kent People in Partnership for a Better Tomorrow", Kent Partnership, April 2006

number of attractive, well designed, lively riverside neighbourhoods have been created, changing once 'why-go?' areas to 'must-go' places.

Medway is now a leading urban short break destination with the Historic Dockyard at Chatham with its National Museum and surrounding defences being declared Kent's new World Heritage Site.

Ebbsfleet International is firmly on the map as an international meeting point, complete with new hotel and conference facilities and famed for its iconic landmark sculpture. Ebbsfleet's success has in turn generated further investment in business and conference facilities elsewhere to capitalise on the growth in the Kent economy.

Ashford's town centre has been transformed to better meet the needs of a growing residential and business populations with new sporting and events venues. Maidstone's new urban design connects the river to the town creating a vibrant centre and thriving nightlife experience for all. Both continue to be destinations of excellence for corporate tourism.

The Coastal towns of East Kent have seen the biggest physical and economic transformation. Kent is now well known for its diverse and beautiful coastline and is in the top three coastal destinations in Britain.

Folkestone's Cultural Quarter has boomed on the back of the newly developed harbour and seafront. The one-hour rail connection to London has resulted in an influx of investment and the town now oozes quality, style and liveliness.

Dover is a mecca for sea sports enthusiasts and both marina and cruise ship business has continued to expand apace. Ramsgate's Royal Harbour has had similar success, helped by a burgeoning reputation for quality restaurants featuring locally landed seafood.

Margate has shaken of its 'tacky' image and is no longer the poor relation of the Kent coast. The opening of the Turner Contemporary, transformation of the Old Town and new developments at Dreamland have boosted confidence and resulted in considerable private sector investment, particularly in small, trendy retail businesses.

Canterbury remains the jewel in Kent's crown and its Cathedral the jewel at the heart of the city. The Cathedral's success in reaching its £50 million-appeal target has resulted in new standards being set for modern-day heritage interpretation. This is mirrored elsewhere in the area's major heritage attractions, which while preserving the historic environment, continue to develop exciting new experiences.

The combination of the creative arts in Folkestone and Margate and improved performance space in Canterbury at the Marlow has helped to boost cultural tourism. The Canterbury Festival has expanded its programme and geographical spread and now forms the apex of a year round cultural tourism programme. This combined approach has been repeated through collective promotion of other assets. The staging of the British Open in 2011 helped the 'Kent Golf Coast' to take off and will be boosted again with the imminent return of the Open golf Championship.

Accessible and family-friendly walking and cycling routes have become key elements of the visitor offer, helping to link towns and villages with the

countryside and along the coast in the process. Rural tourism has increased but sensitively and with the full involvement of rural communities. Those staying in the countryside are given more encouragement to get out of their cars, buy local goods, eat local produce and use local facilities.

Kent's rural traditions in the Heart of Kent continue to play a major role in attracting visitors. Historic market towns such as Royal Tunbridge Wells, Sevenoaks, Tonbridge and Faversham are prized for their individual charms which have been preserved and enhanced. The stock of self-catering cottages has increased with new eco accommodation also available and local communities playing a much bigger part in hosting their visitors. Active interpretation of the whole Kent countryside and its heritage has become particularly popular, through activities such as wildlife and habitat appreciation and rural craft workshops

The 12-year old Visit Kent Partnership continues to combine private sector experience and skills with public sector resources. Anticipating and responding to market trends remains a key function, helping the partners to stay ahead of the game and underpinning continuing visitor economy development.

The experience of the 2012 London Olympics has been used to good effect. The focus on industry skills and training, on local people acting as ambassadors, and on quality in all its forms permeates visitor economy development activity. Kent has a reputation for its knowledgeable, welcoming, friendly businesses and residents that make visitors want to return again and again. The Kent Greeters programme is nationally acknowledged as a leader in its field and as the founder of the national movement of Greeters involving residents with visitors

Kent features widely as a case study of best practice both nationally and internationally and is regularly called upon to advise up and coming destinations in marketing, training, and business development initiatives and programmes.”

4.3 Rationale and recommended actions

The objectives and recommended actions associated with each of them are now explained, followed by an outline of the proposed approach to framework implementation.

1. Helping existing businesses to improve their performance and develop further, in line with evolving market requirements.

There are many examples of successful businesses helping to drive Kent's visitor economy. Some hotels and guest accommodation are achieving high levels of occupancy, delivering quality and in some cases featuring in authoritative, independent guides. A number of major events are well established and attract significant numbers of visitors. Many of Kent's major visitor attractions have consistently invested in their visitor offer and continue to sustain healthy visitor levels as a result.

On the other hand the Kent Tourism Business Barometer for 2008 indicated average serviced accommodation room occupancy across Kent of 56%. The average self-catering unit occupancy for the same month was 65%. These figures indicate that existing visitor businesses have spare capacity at present and that more effort needs to be made to increase average occupancy of existing visitor accommodation. However in some areas such as Tunbridge Wells and Sevenoaks occupancy is higher than average suggesting a need for further accommodation stock but due to being predominately in a green belt area there can be challenges with the planning system.

In addition to sustained destination marketing activity to increase Kent's profile with potential visitors, other specific actions are to;

- i. Identify and share best practice by Kent accommodation providers, visitor attractions, restaurants and other visitor economy businesses and facilities e.g. through producing and issuing case studies and organising peer group business visits.
- ii. Ensure the continued monitoring of data on visitor market and tourism development trends sharing it with tourism business and key agencies.
- iii. Enhance the Kent Quality Programme through the addition of a tourism business development advice service and promotion of the green business accreditation scheme and the National Accessibility Scheme working with agencies to avoid duplication.

2. Identifying, encouraging and supporting additional visitor economy businesses and facilities that will enhance Kent's attractiveness as a destination and increase market penetration, through generating more staying visits.

The review of Kent's existing tourism product indicated a number of product strengths as well as opportunities to strengthen the visitor economy still further through selective additional development. A number of such opportunities have been identified.

While there are a number of prospective hotel and other developments in the pipeline, there is a need to ensure a more coordinated approach to future hotel development to help to grow the market rather than simply spread existing business more thinly. Although Kent as a whole is reasonably well represented in terms of branded hotel accommodation, it lacks destination accommodation. This type of accommodation acts as a destination in its own right – a 5 star hotel, holiday village with integral leisure facilities or modern resort, examples of which are provided in the appendices. Action needs to be taken to seek to increase certain types of accommodation in appropriate locations such as B&B's, 'boutique' hotels, self-catering developments and touring caravan parks.

Entries in independent guides indicate a modest quota of destination restaurants, despite the area's roots as the Garden of England. Kent also offers a limited choice of health and wellness attractions such as spas.

Feedback from Conference Kent indicates that there is frustrated demand for a larger residential conference facility and for more unusual corporate venues. The area's facilities for business tourism – meetings, incentive trips, conferences and exhibitions – are relatively modest and lack scale and differentiation. Further work will be required to identify the extent to which the business tourism sector might be developed but there are likely to be significant opportunities in relation to Ebbsfleet and Kent and Medway's universities.

Although Maidstone has in recent years established a reputation as the clubbing capital of Kent, its appeal appears to be currently limited to a relatively narrow age-range. Across Kent and Medway as a whole evening economy activity – the time of day when the shops close and before pubs and clubs get into full swing – appears to be lacking. This reflects to some extent shortcomings in cultural attractions and facilities and an absence of the public realm functioning as an attractor.

The area's potential for a 'manufactured' extreme sport development (snow dome or similar) is likely to be restricted to the north of the county and Medway. Proximity to major areas of population and accessibility from the rest of the South East are key factors in determining the feasibility of such a development. Such considerations would indicate that a location within the Bluewater – Ebbsfleet – Medway axis would be most likely to succeed. However the potential to add more extreme activity or adventure type facilities to current visitor attractions should be also borne in mind.

Specific actions are to;

- i. Map existing visitor accommodation provision on a geographical and type basis to identify gaps/future needs and appropriate priorities and actions; to include budget, branded and 'boutique' hotels, B&B's and rural pub accommodation, destination accommodation, self-catering and touring caravan parks;
- ii. Draw up and implement a coordinated system of identifying and promoting hotel development opportunities and proposals between local authorities and Locate in Kent;
- iii. Investigate the future development potential of the business tourism sector, in cooperation with Conference Kent and with a focus on the 2012 Olympics;

- iv. Work closely with the cultural sector across Kent to develop initiatives to improve the evening and night-time economy;
- v. Research into the feasibility of developing 'extreme' sport style developments;
- vi. Investigate the importance and future development potential of the Holiday Static Caravans (HSCs) sector;
- vii. Explore the use of new technology in enhancing the visitor experience and information provision;
- viii. Work with Explore Kent on the development of circular routes, connecting key visitor destinations, signage and the development of partnerships between key stakeholders to develop and inform visitor packages;

3. Making the most of opportunities for visitor economy development afforded by on-going investment in regeneration programmes and projects.

Many parts of Kent are undergoing regeneration as a result of national, regional and local investment programmes. Such programmes are primarily concerned with improving physical and social conditions, creating jobs and improving areas as places to live. These significant improvement programmes offer real prospects of also transforming the future prospects of many parts of Kent as visitor destinations. Better places to live are better places to visit.

Collectively the aim in respect of the **Kent Coast** should be to spark a coastal renaissance, reinventing Kent's coastal towns as places to visit and enjoy. This process should be helped considerably by the improved rail travel times via domestic high speed services to and from London from late 2009, particularly for Folkestone and Dover and to a lesser extent for the other coastal towns.

Future positioning needs to focus on the real changes that are taking place and the extent to which the coastal towns complement rather than compete with each other – Margate's emphasis on visual arts, Dover's focus on heritage and sea-sports and Folkestone's emergence as a hub for the creative arts. Allied to this there needs to be a collective step-up in terms of public realm investment, particularly along the sea-fronts, and real improvement in the quality of visitor accommodation and other facilities that are fundamentally important to successful visitor economies – places to eat and drink, events and entertainment, signposting and information provision.

Each of Kent's major coastal towns has seen a major reduction in their visitor accommodation stock over the last 20 years. The situation appears to have stabilised and new investment is now being made. However the towns share a need to attract more, better quality visitor accommodation in line with modern-day visitor expectations and to capitalise fully on the significant investments and improvements being made.

The prospects of enhancing the visitor economy development prospects for the designated **Growth Areas** of Kent and Medway revolve around the successful implementation of key regeneration projects. This is linked to growth prospects in the Kent Thameside economy, associated with key commercial developments such as Ebbsfleet and the Bridge.

Commercial development prospects will similarly dictate the potential scale and composition of specific hotel proposals. As elsewhere developers will assess

current and prospective corporate and leisure demand in arriving at investment decisions. Interest in Ebbsfleet is for 3–4 star hotels with meetings and conference facilities, reflecting the transport hub and commercial development potential for the site as a whole.

Discussions arising from the Kent Thameside Hotel Solutions report flagged up the lack of a local leisure or attraction offer, apart from Bluewater, to help to generate leisure demand for hotel stock, particularly at weekends. The prospects of encouraging the creation of an additional attraction or attractions within Kent Thameside are an important consideration. The prospects of adding further leisure based content to Bluewater are currently under consideration. It is likely that a site in the Ebbsfleet Valley / Bluewater axis offers the best prospect for locating such an attraction. Similarly, proximity to Ebbsfleet International Station will be a major consideration in respect of prospective investment in business tourism facilities for meetings, conferences and exhibitions.

Elsewhere in Kent Thameside, the construction of the new Sikh Temple in as a new landmark building presents new opportunities and new audiences. The redevelopment of Dartford and Gravesend Town Centres, along with stretches of the Thames Riverside, offer the prospect of enhancing significantly these areas as pleasant places to visit, for shopping, eating out etc.

In Medway, work on Rochester Riverside has now started and the development of a new hotel with conference facilities at the Rochester Bridge is expected to commence in 2010/2011. The building of this hotel and others close to the centre of Medway offers the prospect of changing the dynamics of Medway as a visitor destination. Medway has long suffered from a lack of visitor accommodation close to its centre, which will change once new developments proceed and add to the Ramada Encore which opened at Chatham Maritime in autumn 2007.

Medway does not lack visitor attractions or major visitor events. Nevertheless the establishment of the new £13 million National Museum at Chatham Historic Dockyard, involving the relocation of national collections from the Imperial War Museum and National Maritime Museum; along with the proposed £5 million transformation of Rochester's Eastgate House into a centre for literary arts, will strengthen the offer still further. Plans for an iconic waterfront theatre and cultural hub for Chatham waterfront, and a prospective bid for World Heritage Site status for Chatham Historic Dockyard and its defences will also introduce a more cultural dimension to the Medway offer and the prospect of developing a stronger cultural tourism profile and visitor market.

Opportunities to further develop the visitor economy of that part of Swale that falls within the Thames Gateway stem from the regeneration of Queenborough and the sensitive development of eco-tourism on the Swale Marshes.

Kent's other designated growth area, the town of Ashford, is currently undergoing significant physical regeneration including the transformation of the Ring Road and town centre. A site for a new town centre hotel has been identified as part of mixed use development and work is still taking place to assess the feasibility of a concert hall and events arena. The town is particularly well placed to enhance the existing sports provision at the Julie Rose Stadium through the development of water-sports based leisure and tourism at Conningbrook Lakes.

Much rural regeneration work has been done by the two AONB management units and through the Kent Rural Towns Programme to add sensitively to the

rural tourism (**Town and Country**) product, working closely with businesses and local communities. The new Rural Development Programme for England (RDPE), including the new Leader programmes, offer the potential to increase further Kent's rural tourism product.

This implies the need for close coordination of tourism focused development between the respective programmes for the Kent Downs and Marshes, and West Kent. The Kent Sustainable Tourism Network²⁸, launched in autumn 2008, could provide an important tool to allow the coordination of activity and sharing of plans, experience and expertise.

The types of tourism development in rural areas that should be prioritised and supported are;

- Small-medium scale additions to the stock of rural visitor accommodation, especially through the re-use of redundant buildings and land. These should include rural guest accommodation, self-catering and caravan/camping and chalet developments. There are also opportunities for encouraging rural pub accommodation and 'Well-Being' tourism development by rural businesses as identified in specific studies by Tourism South East.²⁹
- Improvements to the tourism offer within rural towns. The Kent Rural Towns Programme provides a platform for encouraging and enabling community generated projects and should be supported through the provision of tourism expertise. It will be important to reflect and enhance local distinctiveness and it is suggested that the prospect of a "Hidden Kent" initiative as an off-shoot of "Hidden Britain" should be investigated.
- Consolidation and enhancement of rural access points and the public rights of way network. This should include key country parks and walking and cycling routes and networks.

Of the larger Kent towns outside the Coastal and Growth areas - Canterbury, Faversham, Maidstone, Sevenoaks, Tonbridge and Tunbridge Wells - Canterbury is a major international magnet and its future performance as a destination is likely to impact significantly on the prospects of Kent as a whole. Each of the other towns needs to continue to identify its particular visitor economy development priorities and share with the rest of the county.

Maidstone has the opportunity to make more of its county town status and build further on its reputation as a popular evening and night-time entertainment centre; while Tunbridge Wells needs to continue to capitalise on its reputation for independent shops and restaurants through further investment in the public realm and cultural activities.

²⁸ A website based source of knowledge and intelligence on all aspects of sustainable tourism, currently under development by the Kent Downs AONB Unit

²⁹ "Rural Pub Accommodation - Unlocking the Tourism Potential", Tourism South East, summer 2004; "Well-Being Tourism - Diversification Opportunities for Farms & Rural Businesses" - product development research, Tourism South East, winter 2005.

Specific actions are to;

- I. Actively engage with each of the coastal and growth area regeneration programme lead bodies to ensure the needs of the visitor economy are fully represented;
- II. Work with South Eastern Trains to monitor and assess the impact of domestic high speed train services from 2009;
- III. Work with partners in France - Comite Regional Du Tourisme and Comite Departmental Du Tourisme Du Nord Pas De Calais on joint tourism development in order to establish a two centre holiday destination
- IV. Encourage and contribute to the preparation of local visitor economy development strategies, including identifying priorities for specific towns;
- V. Identify opportunities for collaborative work on tourism development projects through the work of Visitor Economy Coastal Kent and Thames Gateway Kent;
- VI. Lend support to specific development proposals and funding bids which accord with the Kent tourism development framework.
- VII. Work with Leader Programme area lead bodies, AONB Units and other agencies to identify rural tourism development priorities and projects, including a prospective 'Hidden Kent' initiative.
- VIII. Support and contribute to the Kent Sustainable Tourism Network.
- IX. Work with Tourism South East to unlock the tourism potential of rural pub accommodation and suitable diversification opportunities for farms and rural businesses, including 'Well-Being' tourism.

4. Capitalising on high profile, international sporting and cultural events including the London Olympics in 2012, British Open Golf, opening of Turner Contemporary, second Triennial in 2011 and prospective future visits of the Tour de France.

The 2012 Olympics has already resulted in direct investment in sports and leisure facilities, such as the £12 million Medway Park project which will transform Gillingham's Black Lion Leisure Centre into an Olympic standard sports facility. This and other investments in Kent and Medway's 31 sports facilities selected as potential pre-games training camps offer the opportunity to enhance the area's potential to develop the sports tourism market. Further work will be required to identify the scale of the potential and associated development priorities.

Other than direct investment in a number of sports facilities, the fact that the Olympics will be happening in London in less than three years time is unlikely to be the key determinant in future tourism development investment decisions. The 2007 "Hotel Solutions" report into hotel development prospects in Kent Thameside - the part of Kent closest to the main Olympic venues - concluded that the Olympics will not be deciding factor in determining future hotel

investment decisions but has been acknowledged as a consideration. There is a need to carry out some further work to seek to identify the visitor accommodation demand implications associated with the Olympics and to put the findings to good use to support the case for hotel investment. It will be important to link this work to the transport infrastructure in relation to accessing the Games from Kent and Medway in 2012.

Where Kent does stand to gain from London 2012 is by being in as strong a position as possible to maximise the visitor economy benefits before, during and after the Games. Tourism South East estimate a £1 billion boost to tourism in the South East and it is estimate Kent will get £324 million of this with an opportunity to reach new and untapped markets. This means being in a position to provide the best possible information to prospective visitors; seamless and easy to book travel arrangements; excellent customer service; and a focus on quality in terms of accommodation, food and drink, cultural activities etc.

We need to be aware of the developments happening in London. Substantial facilities being constructed at Stratford for 2012 which will impact on the viability of any commercial leisure development in Thames Gateway.

One key opportunity that needs urgent consideration is the potential for additional business tourism associated with the 2012 Olympics. A study into the London 2012 Business Opportunities for East London³⁰ was produced earlier this year to help to guide partners' work in East London. Research for Kent might focus on the prospective role of and support required by the Conference Kent, along with the prospects of influencing the timing of potential new business tourism facilities.

Another key opportunity is the Cultural Olympiad in supporting existing events and developing exciting new ones which would attract visitors across the county throughout the year. The bicentenary of Dickens birth in 2012 provides a great opportunity to profile a key literary figure with strong connections to Kent and helps provide a focus for key development at Eastgate House, Gads Hill and Dickens Museum in Broadstairs.

Kent has a successful track record of hosting major international sporting and cultural events. The visit of the Tour de France in 2007 was considered a great success by the Tour organisers and was hugely popular with Kent residents and visitors alike. One of the major benefits from hosting such events is the worldwide media coverage which helps to raise Kent's profile as a visitor destination. The value of such coverage arising from the visit of the Tour de France in 2007 has been estimated at more than £3 million.

Specific actions are to

- I. Investigate the sports tourism development potential of the 31 pre-games training facilities in Kent and 5 in Medway, including their potential role in sports tourism events;
- II. Identify the visitor accommodation demand implications associated with the Olympics and put the findings to use to support the case for promoting

³⁰ Study on behalf of the London Development Agency and London Thames Gateway Development Corporation - Blue Sail / Tourism Plus, February 2008

hotel and other investment. It will be important to link this work to the transport infrastructure in relation to accessing the Games from Kent and Medway in 2012;

- III. Develop and implement a detailed plan of action for providing for Olympic Games visitors;
- IV. Apply lessons learned from hosting previous British Opens and the Tour de France to planning for the Olympics, including the development of a suitable home-stay scheme for prospective visitors;
- V. Support Kent Arts Development Unit who are working with partners and external organisations to build Kent's Capacity to stage major international arts and cultural events as part of their Cultural Strategy;
- VI. Support the East Kent Festival Cluster;

5. Focusing on local distinctiveness to enable Kent and its individual destinations to stand out from the crowd but also combine to offer a range of complimentary offers to potential visitors.

Local distinctiveness is the essence of destinations. It is what distinguishes one place from another and is at the heart of why people choose where to visit in the first place. In a world of globalisation and homogeneity, visitors of all types are responding more and more to the different, the unique, and the distinct.

Kent's image and reputation as the Garden of England is unique and should be sustained and developed further. As the Garden of England, much of the area is associated with food production and with certain foods in particular – fruit, hops and cobnuts being examples. This has been capitalised on to some extent through the creation of food and drink trails – hops and beer, apples, wine and Romney lamb – but it offers the opportunity for further development. Produced in Kent³¹ is well established and its work should be built upon.

Other priorities should include targeting tourism businesses to raise their awareness of Kent producers and suppliers and a coordinated focus on the re-use of buildings which have the potential to become landmark restaurants.

In tourism development terms Kent's towns, areas of countryside, individual attractions and other visitor businesses need to focus on what makes them distinct. Enhancing and strengthening distinctiveness should be key considerations in tourism development decisions.

Specific actions are to;

- I. Work with Produced in Kent to identify opportunities to make more, in visitor economy terms, of local produce;

³¹ Produced in Kent is a not for profit organisation funded by KCC and SEEDA; see www.producedinkent.co.uk

- II. Work with Kent Arts Development Unit and support the Cultural Strategy;
- III. Emphasise the importance of local distinctiveness in progressing specific tourism development plans and proposals;
- IV. Produce and distribute guidance on how existing and new tourism businesses can benefit from a focus on local distinctiveness;
- V. Identify opportunities for combining Kent visitor products and local destinations to feed into targeted marketing campaigns;

6. Ensuring that key public and private sector players work together as effectively as possible towards achieving agreed tourism development priorities.

The range and scale of actions proposed will require a much greater degree of collaboration and partnership between the local bodies responsible for tourism development and the suppliers and managers of attractions and visitor facilities.

The work of Medway Council and Kent's district, borough and town councils is critical to achieving future tourism development potential. Local authorities have the local knowledge and contact with local communities as well as providing many of the services of such importance to the development and maintenance of local destinations.

Attempts have been made in the past to monitor tourism development and seek to coordinate tourism investment activity. This is now a priority for action for a number of reasons:

- To avoid potential duplication of activity, including multiple approaches to potential investors
- To align tourism investment priorities and possible funding bids
- To provide a clear direction to the industry and to potential investors
- To enable the identification of ancillary requirements, such as workforce development and training
- To provide a stronger, collective voice for tourism as a key component of regeneration
- To optimise Kent's potential to develop fully its visitor economy

Given the recent establishment of Visit Kent as a strategic body for tourism, combining public and private sector tourism interests, it makes sense that Visit Kent should also play a lead role in coordinating tourism investment promotion activities while making sure not to duplicate work of other regeneration bodies. This will require a resource commitment in the form of a member of staff to lead such activity, supported by a tourism development group with members drawn from SEEDA, Tourism South East, Medway Council, representatives of coastal, growth area and rural destinations, Locate in Kent and the Kent Planning Officers Group.

The purpose of the tourism development group should be to identify, prioritise and implement the key actions arising from this strategy, as well as reviewing

periodically the progress of the strategy and amending development priorities as required. It will be essential that the group is provided with up to date intelligence on tourism industry performance, development trends, market trends and the progress of key developments. The Group should also guide the tourism and leisure sector work of Locate in Kent, which has an established track record in targeting investment in a number of key sectors.

Specific actions are;

- I. For all Kent's local authorities, public sector agencies, public / private sector partnerships, local tourism associations and major tourism businesses to support the Kent Tourism Development Framework.
- II. Identify and allocate a resource commitment to coordinate tourism investment promotion activities.
- III. Draw up terms of reference for, establish and support a Kent Tourism Development Group.

7. Improving the skills of people who work in Kent's tourism industry and the quality of welcome and service received by visitors.

Key to the successful operation of any visitor economy is the availability of a well trained workforce inspired by the ethic of exemplary customer service and customer care, employed by people who believe in investment in their people to offer great facilities, services and events to visitors and residents alike.

The Celebrating Kent programme is seeking to achieve new levels of customer care based on pride and better product knowledge. The Greeters programme involving local residents engaging with visitors on a volunteer basis, the Big Day Out – a special one day event to encourage residents to visit their local attractions - the awards scheme to reward good customer service are all examples of a new, innovative programme developed for Kent and Medway. However, the scheme needs further and continued funding to achieve geographical coverage and engagement with the wider service sectors and transport operators.

More needs to be done to assist owners and managers of all types of visitor accommodation, visitor attractions, restaurants and other facilities to understand what the market is now expecting by way of standards of service.

Specific actions are to;

- I. Sustain and expand the Celebrating Kent programme, including advocating support for the Programme to developers and operators of new businesses. Roll out the Greeters Programme county wide
- II. Work closely with schools and local Further Education/Higher Education institutions on a range of workforce support and development initiatives.
- III. Investigate the potential for establishing a centre of training excellence such as a training hotel, with education providers and other stakeholders

8. Delivering and sustaining a quality tourism product for visitors.

One of the outcomes of increased leisure travel by consumers and increased competition for their business has been to raise expectations. Tourism businesses and destinations need to deliver a quality product consistently if they are to prosper. Poor quality businesses and facilities will deter visitors and damage the reputation of the destination in which they are situated.

Most of Kent's local authorities have subscribed for many years to the principle of only promoting quality assessed accommodation in the process of marketing their areas as destinations. This has helped to achieve well above the national average participation rates in the national accommodation grading schemes. This is a positive base on which to build.

Nevertheless there are also poor quality accommodation and other businesses which do nothing to help the area's reputation as a visitor destination. It will therefore be important to take action to either help such businesses to improve or to use legislation to take action against them if this is justified.

Sustainability will be fundamental to the development and on-going operation of new tourism developments. For example, the Turner Contemporary Gallery needs to succeed over many years, not just bring an initial significant upturn in visitor numbers to Margate followed by gradual decline. The initiative will require sustained support, the application of lessons learned from attractions in Kent and elsewhere which have sustained and adapted their visitor offer over time, and continuously effective support infrastructure.

Specific actions are;

- I. Produce and distribute information and advice on quality issues, improvement and advice to all tourism businesses.
- II. Develop and implement a coordinated campaign to identify and take action on sub-standard visitor accommodation, working closely with Kent Trading Standards.
- III. Sustain the work of the Tourism Quality Programme and provide it with the necessary support to implement projects, including the provision of data from the Kent Tourism Research Programme.
- IV. Conduct an accessibility audit and provide support to business in order to make Kent an accessible destination

4.4 The next steps

The detailed examination of the state of Kent and Medway's visitor economy required to produce this strategy has revealed much room for optimism. As comparison with other destinations shows, the collective business and public sector focus on attracting visitors to Kent pays dividends.

In destination marketing terms Kent and Medway works in a well structured and organised way. This framework will serve as a call to arms so that a more coordinated and dynamic approach is taken to promoting destination development. Enhanced, sustained and coordinated activity is needed in the face of stiff competition from better funded destinations in many other parts of the country.

A range of interested parties have been consulted with in the course of the preparation of this strategy, including SEEDA, Thames Gateway Kent Partnership, various Kent County Council departments, the Kent Planning Officers Policy Group, Locate in Kent, Conference Kent, local authority tourism officers and the Visit Kent steering group.

The process of consultation on this draft strategy should spell out the proposed extent and involvement of partners in ensuring the future coordination of tourism development activity.

The framework has been informed and supported by the following organisations:

Medway Council

Ashford Borough Council

Canterbury City Council

Dover District Council

Gravesham Borough Council

Maidstone Borough Council

Sevenoaks District Council

Shepway Borough Council

Swale Borough Council

Thanet District Council

Tonbridge and Malling Borough Council

Tunbridge Wells Borough Council

Discover Folkestone

Tourism South East

South East England Development Agency

Margate Renewal Partnership

Dover Pride

Kent Downs AONB

Kent County Council Regeneration and Economy, Environment and Waste and Communities Directorates

Kent Ambassadors

Explore Kent

Produced in Kent

Locate in Kent

Southeastern

Dover Harbour Board

Visit Kent Investors from the private sector

