

Kent and Medway Tourism Development Framework Executive Summary

The Brief

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 and attract visitors? Indeed what can and should be done to improve Kent and Medway's competitiveness as a visitor destination?

The strategy brief sets out nine specific tasks

- 1 Identify what Kent and Medway needs in the next 10 years in terms of new tourism product
- 2 Examine the potential offered by the Olympics in terms of new product development
- 3 Examine the tourism potential offered by the Thames Gateway North Kent and Ashford growth areas
- 4 Examine the tourism potential and future positioning of Kent resorts and the coast
- 5 Examine market requirements and identify new tourism trends
- 6 Identify some key sites and one or two major tourism opportunities
- 7 Make recommendations to co-ordinate tourism regeneration at a strategic level.
- 8 Make recommendations to ensure a co-ordinated approach to developers and investors.
- 9 Consult with partners to agree the best ways of working together

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 Kent¹, 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 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 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, most 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 number of attractive, well designed, lively riverside neighbourhoods have been created, changing once 'why-go?' areas to 'must-go' places.

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.

¹ "Vision for Kent - Kent People in Partnership for a Better Tomorrow", Kent Partnership, April 2006

Ashford's town centre has been transformed to better meet the needs of a growing residential and business populations. Corporate business is strong and venues such as Conningbrook Lakes have generated significant sports and leisure oriented visitor business.

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 mirrored elsewhere in the area's major heritage attractions. The rebuilt Marlowe theatre is renowned as a first class regional theatre and centre for the performing arts.

The combination of the creative arts in Folkestone and Margate and improved performance space in Canterbury 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 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 and use local facilities.

Kent's rural traditions continue to play a major role in attracting visitors. The stock of self-catering cottages has increased and local communities play a much bigger part in hosting their visitors. Active interpretation of the 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.”

Recommendations: Tourism Development Priorities and Actions

An action focused strategy

Analysis indicates that Kent appears to be 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 enhance further Kent's future performance as a visitor destination.

The 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.

Strategic objectives

- Helping existing businesses to improve their performance and develop further, in line with customer needs and trends and the changing economic climate;
- Identifying, encouraging and supporting new visitor related businesses and facilities Making the most of opportunities for visitor economy development through 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 inauguration of the White Horse Landmark Sculpture, the second Folkestone Triennial in 2011, the London Olympics in 2012 and prospective future visits of the Tour de France etc;
- 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 management², based on the interaction between visitors, the industry, the community and the environment.

² Destination Management Handbook, English Tourist Board and Tourism Management Institute, 2003.

A Changing World

Since the Kent and Medway Tourism Development Framework was commissioned we have entered into one of the most severe economic downturns seen in decades.

It is too early to fully understand the long term implications for the tourism industry but it has already changed the way people use their leisure time which has created potential opportunities and challenges as follows:

Staycations

- Real potential to increase domestic visitors as more people decide to holiday at home

*Research conducted by the RAC states that in 2009 60 per cent of Britons, or 37 million people, are planning to stay put, giving rise to the phenomenon of so-called "staycations". That works out as double the amount of staycationers as last year.*³

*A Visit England study found that 90% of the population is cutting back on its overall spend, but the importance of holidays means that they are "more protected" than other areas of expenditure. More than half of people involved in the research (63%) expect to take a break or holiday in England in the next year. The predictions emerged as national tourism agency Visit Britain predicted a "tipping point" for tourism in the UK in 2009.*⁴

European Market

- The strong Euro is already attracting more overseas visitors. Kent is a particular beneficiary being so close to the continent and a key gateway to the UK.

*The number of French tourists visiting the UK looks set to almost double this year because of favourable exchange rates. Expedia.com says it has seen an 80 per cent increase in French tourists booking trips to the UK in January, while Skyscanner.net says searches for flights to the UK from France have gone up 70 per cent this month. Business is also booming for the cross-Channel Ferries. Brian Rees, head of public relations for P&O Ferries told Times Online that passenger bookings from Calais to Dover are up 8 per cent for January compared to the same period last year.*⁵

³ Travel Mole - April 2009

⁴ Visit England 2009

⁵ The Times February 2009

Accommodation Sector

- Accommodation providers are likely to face the most challenges. There seems to be a shift from luxury to budget accommodation as well as from serviced to self catering, particularly at the lower end of the market with holiday camps, camping and caravanning seeing a resurgence. Hotels are also suffering with a drop in the conference, meeting and incentives markets

Hotel Britain 2009 report, based on the performance of 548 hotels with 88,000 rooms across London and the regions, found occupancy dropped 2.5% to 73.9%. PKF hotel consultancy services partner Robert Barnard said UK hotels face a challenging year in 2009 due to the deepening economic downturn.⁶

The majority of UK hotel executives (95%) polled for a hospitality report are predicting hotel chain bankruptcies in the next 12 months. And a quarter of the 143 bosses surveyed anticipate that more than ten chains will go into administration in the next year. Only 38% of UK hotel executives expect the industry to recover in 2010⁷

The Camping and Caravanning Club has experienced one of its most successful Easter bank holiday weekends on record. The Club saw a 50 per cent rise in occupancy rates on its 109 UK Club Sites during Good Friday, Saturday and Easter Sunday 2009 compared to the same period last year. Sites across the network were brimming with both members and non-members, who had opted for value breaks in this country over potentially expensive foreign trips due to the current economic climate.⁸

Development

- Slow down in development and regeneration projects – we have already seen signs of delay on various projects in the southeast region. There is a key issue of reduced funding available in the public sector and the credit flow drying up for hotel development. There are signs of a shift in accommodation expansion plans from developing new hotels to conversion or take over of smaller hotels.

InterContinental Hotels Group's pipeline of new developments will be affected by the global economic downturn, its chief executive has warned. "We are seeing some slowdown in the opening speed of hotels, especially at the top end," said Andrew Cosslett, chief executive of the UK-listed company, which is the world's largest hotel group by numbers of rooms. The downturn is starting to grip the world's big hotel brands as leisure travellers and businesses rein in their travel plans and developers struggle to complete openings. Frits van Paasschen, Starwood's chief executive, said it would this year open 80 to 100 hotels, projects that were well advanced by the time the credit markets closed. "Beyond that, it's in our governments' and bankers' hands," he said. But what they lose in development deals, the big groups

⁶ Travel Mole February 2009

⁷ Travel Mole February 2009

⁸ Camping and Caravanning Club April 2009

expect to make up in independent hotels and smaller chains converting to their powerful brands to stay in business.⁹

Skills and Training

- Concern that there will be a drop in investment in skills, training, and quality in times of economic difficulty and cost cutting period.

Recently at a tourism summit the Chair of Visit Britain Christopher Rodrigzues commented on the Basil Faulty culture in UK Tourism saying “ Shoddy service and high prices are putting foreign visitors off visiting the UK, which is threatening thousands of jobs during the recession. We've had a period in which people could get away with not being of the highest quality. We're now in an environment where you have to do quality. Five-star can be memorable but actually there are an awful lot of memorable hotels that are bed and breakfasts – a really nice English breakfast served with a smile and a comfortable bed, where there's a clean bar of soap and the towels are fluffy – that can be all it takes,”¹⁰

Sustainability

- A consumer shift away from green in favour for value for money and a concern business will move away from long term investment due to the need for short term cost cutting,

The number of concerned consumers who said that they would pay extra for an environmentally friendly or ethical product dropped by 5 percentage points in March 2009 to 53 per cent. It has fallen 12 per cent in a year. The number of concerned consumers who said that they would buy the best-value product regardless of its ethical credentials, shot up 6 percentage points in March, up 12 percentage points in a year, to 47 per cent.¹¹

⁹ The Financial times 2009

¹⁰ Visit Britain 2009

¹¹ The Financial Times April 2009

Kent Strategic Policies

Backing Kent Businesses and Backing Kent People

Kent County Council in response to the current economic climate launched a 10-point package of support as part of its [Backing Kent Business](#) campaign. The aim of the campaign is to support Kent's business community, make it easier for local firms to have access to contracts with the council and ensure there are as many Kent jobs for Kent people as possible.

In addition Kent County Council and its partners are working together to support the county's residents through the recession. The campaign [Backing Kent People](#) will promote more effectively the support already available and launches a number of new initiatives.

The Kent Regeneration Framework

As well as the economic climate that the Kent and Medway Tourism Development Framework needs to respond to, there is also a changing landscape as far as economic development and regeneration agendas are concerned.

At county level the response to this is the Kent Regeneration Framework, Unlocking Kent's Potential. This is not a strategy but an overarching statement of Kent County Councils' contribution alongside its partners to delivering the aspirations set out in Vision for Kent and the first steps to defining what we all want Kent to look like in 20 years time.

There are six key areas

- Building new relationships with Business
- Unlocking talent to support the Kent Economy
- Embracing a growing and ageing population
- Building homes and communities, not estates
- Delivering growth without transport gridlock
- Meeting the climate challenge

The tourism industry is a key sector for the county and key outputs under "Building a New relationship with Kent Businesses" includes

- Market and promote the country to businesses and visitors
- Continue and build upon tourism initiatives to bring visitors to Kent

Next Steps

With the context for tourism changing so dramatically since the Kent and Medway Tourism Framework was produced Visit Kent organised a workshop with key stakeholders to discuss next steps.

The key outputs were as follows:

- We need to recognise the challenges of the economy but this should not deter us from sticking to the clear visionary principles outlined in the Tourism Development Framework
- The Report is complimentary and supportive to the Regeneration Framework being a key sector within it and a delivery mechanism for many of the aims.
- The cross cutting principles of the Regeneration Framework are endorsed by the Tourism Development Framework that recommends working more closely with the sports and leisure, cultural and environmental sectors
- It is not about changing the recommendations but about reprioritising and linking into the Backing Kent Business and Backing Kent People philosophy. Focus should be on helping existing business, developing skills and maintaining/improving quality through partnership working
- It was felt that there should be more of a focus on the visitor, understanding what their needs are and what facilities they need to enable them to enjoy their visit to Kent and return again.
- The key element for an effective action plan is clear outputs and targets with evaluation process in place to monitor progress
- We need to concentrate on what will give us the competitive edge and make Kent stand out compared to other destinations in the UK. It was felt that a focus on local distinctiveness and sustainability was key to achieving this. It was considered vital that we have a long-term approach with a clear, strong plan that we stick to so that when the current conditions change Kent tourism is not just fit for purpose but achieving excellence in everything it does.