Canterbury

A first class cultural heritage destination

Destination Management Plan 2018 – 2024

A Destination Management Plan for Canterbury

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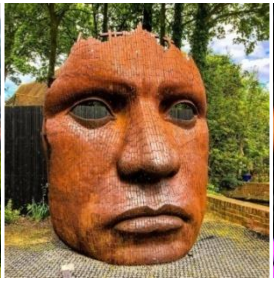
1. Where are we now?

Setting the scene for the next 6 years

The core objective of this Destination Management Plan is to position Canterbury as a first class cultural heritage destination**.**

Since the first pilgrims arrived in mediaeval Canterbury, the city has been welcoming visitors. It is a source of literary inspiration, a seat of learning, home to world class architecture, and a deliverer of good hospitality.

Building on activity delivered as part of the initial 2013 Destination Management Plan (DMP), this phase 2 plan will outline a programme of actions for the next 6 years based on the following guideline objectives:

- Raising the value of the visitor economy by increasing visitor spend and dwell time;
- Exploring the destination opportunities posed by having an established higher education offer
- Highlighting the need to build on developments of the past 10 years such as HS1, to position the city as a place to live and work outside of London.

The 2018 DMP has been delivered by Visit Kent and steered by the Business Improvement District in consultation with Visit Canterbury and representatives from across the city's business sector. Consultation has also been conducted across the wider industry to review opportunities to improve existing services, and recognise areas of product development that could enhance the city's offer to appeal to new higher spending consumers. In addition, during the research phase an in-depth review was conducted of future travel trends, to ensure that key recommendations were aligned to emerging consumer needs and expectations.

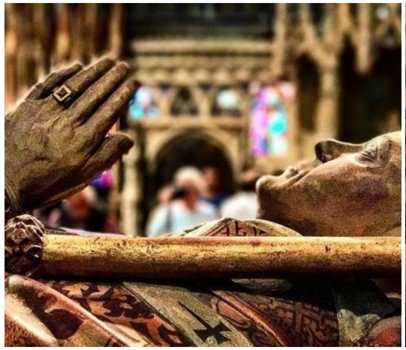
Canterbury has consistently delivered an appealing visitor offer, but like most English heritage cities, this manifests itself in a high percentage of day visitors. Certain groups have remained constant up until recent years, such as language students and day trip coach tours, but although these consumers bring volume, they have a limited dwell time and a relatively low spend per head.

The leisure and retail landscape is changing; visitors want to have information at their finger tips, so they can maximise their time and ensure greater value for money. They are looking for destinations where they can ‘go local’ and feel less like ‘a tourist’. They want to be entertained as well as educated; discover something new and immerse themselves in a genuine authentic experience.

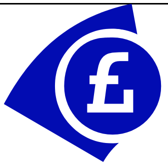
Shopping is the no.1 expenditure for the day visitor and on average; international visitors spend almost twice as much on retail than their domestic counterpart. In order to stand out, destinations have to identify their distinctive qualities, be bold in the way they tell their story and understand that the retail shopping experience does not sit alongside but is interwoven in the overall destination experience.

Canterbury is the home to the oldest seat of learning in the country; however education as a destination strength has possibly been underplayed. The Oxford and Cambridge visitor proposition is built on the international education offer; Bath and York all have fewer students, yet they use the presence of their universities as part of the destination message to underpin a cultural vibrancy offer alongside the built heritage. Not only do Canterbury students spend £280m in the local economy, but they are great city ambassadors and if valued could become an effective communication channel to influence friends and relatives to visit the city. They also form a substantial percentage of the seasonal/ hospitality workforce, engaging directly with visitors.

To strengthen Canterbury’s position, there needs to be a focus on delivering targeted products to satisfy consumer expectations. Anniversaries and events such as Beckett 2020 and the Lambeth conference alongside investment such as the Canterbury journey visitor centre and a centrally located 4 star hotel offer a great opportunity to reposition the city. In addition the appeal of the city airbnb product offers the opportunity to entice new higher spending independent visitors, while the variety of the events programme can be used to reinforce ‘why visit now’.

The Canterbury Visitor Economy   Volume and Value Headlines:

	**7.2 million** Day and overnight trips no.1 destination in Kent		**£450 million** Day and overnight visitor generated value (indirect + actual spend)		**9,378 jobs** Visitor economy = 15% of all employment

City Context: *More visitors are coming but they are spending less and those that are staying are showing a slight decline in the number of nights.* *Note: Cambridge Model data is district wide.*

No 1 in the County: Canterbury attracts 7.2 million day and overnight trips. Over 75% are for holiday and leisure purposes (Holiday + VFR), making it the no.1 destination in the county. They create a collective value of £450 million each year, supporting city based jobs and services.

Dominated by day trips: Day trips dominate at 91%; although not surprising given Canterbury's proximity to London and the near continent, it does heighten the issue of high volume low spend, where average spend per day trip is £32.75.

Staying visitors spend more but international visitors spend the most: -
9% of visitors stay overnight but they account for 40% of overall value. -
Of the 9%, international visitors make up 27% of overnight trips, yet account for 47% of the overnight value -
Overseas visitors spend twice as much as UK visitors on shopping.

Seasonality challenges: Not surprisingly, Kent's accommodation sector experiences most fluctuation from November to March, notably with March being the most challenging month where occupancy for serviced accommodation falls below 70% with self catering being significantly lower. Mid week in the winter season also poses an occupancy challenge with December to February dropping to around 40-60% across the sector.

Decline in visits to places of worship: Over the last 3 years, visits to places of worship have been significantly affected by the threat of global terrorism, in 2016 Westminster Abbey (-28%) and St. Pauls Cathedral (-5.6%) experienced significant decline in visitors. However 2017 figures have shown some growth except for Canterbury Cathedral which has seen a further 3% decline possibly due to a slow recovery of near European school visits and extensive restoration activity.

The potential for University related travel and Visiting Friends and Relatives (VFR) – With almost 37,000 students across 3 universities there is a potential to create an offer based VFR promotion to encourage overnight stays in the city during off peak periods. Statistics indicate that this 'purpose of visit' is relatively underutilized; Canterbury has a relatively low % of VFR trips (24%) compared to the Kent average of 35%.

Business Tourism represents 19% of visits.

Kent Context:

High awareness, but less of a desire to repeat visit–The awareness of Canterbury is high, especially when based on a previous visit, but the likelihood to repeat visit is notably less compared to the nearby destinations of Thanet or Whitstable, especially for the under 44 segment. Recent high profile cultural regeneration such as Turner Contemporary, have created a sense of immediacy around the offer of new product and new events/ exhibitions.

Visitors love the heritage but need to hear more about the wider offer - The visitor perception research shows that visitors clearly see Canterbury's heritage and architectural offer as a key motivator for travel. However, arts and cultural events and sporting activities such as county level cricket, all offer growth potential.

Visitors are generally older and local – the 2018 Kent visitor profile and perception research indicates, that Canterbury's visitor base is skewed towards the 55+ market, receiving notably less than the Kent average for the 25-44 age group. Also, over 75% of domestic visitors are coming from London and the South East.

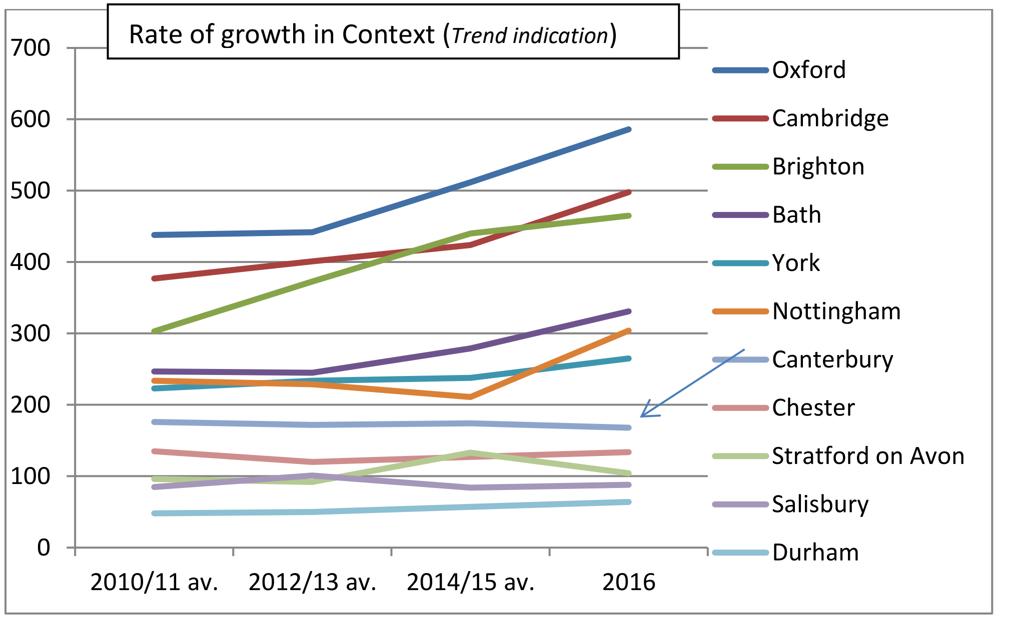
Market share retention: In the wider county context, Canterbury is actually experiencing a slight decline in overall % share for overnight trips and expenditure (even though the city specific figures have increased) ... more people are coming to the county but they are choosing to stay elsewhere, this slight % shift has been attributed to the recent increase in appeal of Margate and Broadstairs.

National Context:

From 2010 - 2016 Canterbury hasn't exhibited the same international visitor growth rate, especially when compared to Bath(13%) and York (7%) where Canterbury is (-1%), (see graph opposite based on IPS figures only).

Recent VisitEngland research that compares 40+ destinations for customer satisfaction and likelihood to revisit, reinforces the need for Canterbury to engage more with the consumer, to deliver targeted information and broaden their awareness of what's on offer.

	Canterbury	Bath	Durham	GB Average
Satisfaction	39%	48%	45%	49%
Likelihood	7.6	8.2	7.7	8.2



Kent Economic Impact Study 2015; Canterbury hotel market fact file 2015; ALVA visitor figures 2017; International Passenger Survey, Kent perceptions research report: Canterbury 2017; VisitEngland perception research for comparative destinations 2017.

The Canterbury Dashboard

The visitor economy at a glance:

Canterbury Visitor Economy Dashboard	2011	2013	2015	2017(Dec 18)	observations
Total Visitors	7,130,000	7,015,000	7,220,000		Maintained/growth
Total Economic Value	£428,537,000	£446,709,000	£453,865,700		Maintained/growth
Total Employment	8359	8,833	9,378		Steady growth
Total Day Trip	6,525,000	6,380,000	6,571,000		maintained
Total Overnight Trip	605,000	635,000	649,000		Some growth
Total Day Expenditure	£221,525,000	£213,794,000	£215,205,000		Slight decline
Total Overnight Expenditure	127,654,000	142,589,000	145,983,000		growth
Domestic Overnight trips	450,000	466,000	470,000 (73%)		Some growth
Overnight International trips	155,000	169,000	179,000 (27%)		+6% growth
Overnight Domestic spend		£76,276,000	£77,064,000 (53%)		+1% growth
Overnight International spend		£66,313,000	£68,919,000 (47%)		+4% growth
Spend per person - Day	£33.95	£33.51	£32.75		maintained
Spend per person – Overnight (based on av. 4.1 nights stay)	£211	£224.55	£224.94		maintained
Kent distribution % of overnight trips Domestic	11%	12.8%	12.2%		maintained
Kent distribution % of overnight trips Overseas	19%	17.2%	17%		Slight decline
Kent distribution % of overnight expenditure Domestic	11%	14.3%	13.5%		Slight decline
Kent distribution % of overnight expenditure Overseas	23%	22%	21%		Slight decline

The knowledge economy at a glance: *University of Kent and Canterbury Christ Church University combined figures*

Canterbury Knowledge Economy Dashboard	2015
Overall worth to the Canterbury Economy	909,000,000
Annual off campus expenditure	280,000,000
Total Employment	9,900
Off Campus expenditure generated jobs (full time equivalent)	2447

Economic Impact of Tourism Canterbury – 2011/2013/2015 Cambridge model Results/ The Canterbury Christ Church/Kent report was produced by Viewforth Consulting Ltd

2. Where do we want to be?

2018 - 2024	*To position* **Canterbury** *as* **A first class cultural heritage city**				
	A city that Inspires		A city that welcomes		A city that brings people together
The core objective	**Tell fresh stories**	**Grow the overnight market**	**Deliver a distinctive brand**	**Increase day visitor spend**	**Create a healthy trading environment**
What & Why	Broaden the visitor's awareness of what the city has to offer - 'You came for the cathedral and found a punt'. Create a reason to visit now. Getting real stories, recommendations and tips on to digital platforms from real people Kent Contemporary campaign	Reaching out to the best prospect UK & overseas visitors Match the visitor needs and aspirations to the city product. Raising the profile of the evening experience. VFR opportunities for Students	Take bold images Create engaging content Develop brand tool kit Review the destination website. Engage with 3^{rd} party sites and SM platforms to bring the brand to life.	Nurture the high spending group market. Work with the travel trade – support the lead attractions. Review the welcome/ brand at points of entry Manage footfall and bottlenecks for school groups.	Make Canterbury a better place to work, live, visit, study, invest. Incentivise locals to experience the city in new ways. Support the festivals and events programme. Enhance :Clean, Safe, Welcoming Support: helping new business Encourage: business to cross promote.

	Core work streams to deliver the objectives and underpin the destination statement		
	Work stream 1 – Brand, Product, Channel	***Work stream 2*** - Customer	**Work stream 3** -Industry/ trade/ Partnerships
Top line deliverables	-**Deliver a brand** guide and key tools -Stunning images that shows people what they expected in a different light and what they are yet to discover in a new light.	-**The big invite** – Grow the VFR market by co-ordinating value added offers to entice student family and friends to visit and stay from Nov–Mar.	-**Travel trade** engagement programme Focuses on high spend international groups from Nr Europe and out of London. New market/ segment potential.
	-Deliver a **digital content plan** across VC/ 3^{rd} parties, and social media - deliver **rich itineraries** to help plan a great visit. **Quality content** is key	-**Digital Ambassadors** - engaging with local people who live work, study and invest in the city... what would they recommend?	-Working with growth partners such as **Air BnB** to help position Canterbury as a great place to go local.
	-**Point of entry branding** and facilities - Way marking / route branding to the city centre Product review for segment fit	Dial-up culture, **create a reason to visit**, profile events and capitalise on 2020 Tell fresh stories about the heritage.	-Destination PR focusing on showcasing the **Canterbury experience** (Domestic/International) -Theme based itineraries for school groups.

	Immersive Experience	**Information focused**	**Authentic**	**'Go Local'**

Core Objectives for the next 6 years

DMP Aspiration		To position Canterbury as **A first class cultural heritage destination**
1	**Tell fresh and compelling stories**	➢ Broaden the consumers understanding of the city offer ➢ Generate a reason to visit ➢ Confirm the well known heritage offer and introduce the new by raising the profile of culture. ➢ Start talking activity and experiences , introducing a human element
2	**Grow the city's overnight stay market**	➢ Reach out to the right domestic and international visitors who are already predisposed to choosing Canterbury ➢ Matching the right product to the right customer based on key triggers that generate a desire to travel ➢ Encourage them to stay longer to experience more. ➢ Coordinate a product offer that Inspires, welcomes, educates, entertains and helps the visitor feel like a local
3	**Work in partnership to deliver a distinctive brand**	➢ Deliver seamless destination management and promotion ➢ Strengthen the destination message with a brand that ensures quality; reinforces partnership working and underpins a city position around visit; study; Invest. ➢ Use the brand delivery to bring the visitor and knowledge economy closer together
4	**Increase day visitor spend**	➢ Shift day trip focus from volume to value ➢ Nurture the relationship with the groups market with the aim to increase Canterbury's share of international day visits. ➢ Working in partnership with Canterbury's leading attractions, develop tools to support educational visits; develop themed itineraries to ease footfall and encourage dispersal of groups *(with translation options)* ➢ Improve coach parking offer and review points of entry branding for the city (*Coach, Train, Car*), ensure a sense of welcome and to underpin the wider message of 'visit – study - invest'.
5	**Create a healthy trading Environment**	➢ Help make Canterbury a better place to work, live and invest ➢ Position Canterbury as a leading cultural heritage destination in order to attract a more lucrative visitor market; Incentivise locals to experience Canterbury in new ways through My Canterbury ➢ Support festivals and events that drive additional footfall and promote dwell time to target audiences

Targeting the best prospect visitors:

- ✓ **Looking after the day visitor market** - With 91% of Canterbury's visitor base currently arriving on a day trip, it is vital to nurture this business, with the aim to get them to repeat visit and encourage extension of stay. Delivering engaging and enticing destination info is key – even day visitors want to be inspired by tailored itineraries that tap into their personal interests.
- ✓ **]`**
- ✓ **'/`;**By showcasing multiple itinerary options, the visitor will start to build a wider understanding of what the city has to offer. Every aspect of communication needs to deliver a bold constant brand message, linking great core product to the interests of the consumer.

- ✓ **Encouraging overnight stays to coincide with available capacity** – Canterbury's hotel and guesthouse occupancy rates averages around 76%, but in peak season, especially at weekends occupancy is closer to 90%. Therefore by creating reasons to travel during the off peak season, linking to date specific events or by incentivising travel through added value offers could engage with new customers.

- ✓ **Working closely with the travel trade and group organisers** – Proactively working with the travel trade can help target higher spending international markets. For example as global affluence continues to rise it is forecast that China will overtake the Euro zone by 2025 with 16% of global GDP. Although China is a relatively small market for Canterbury, the city has all the right components to appeal: Iconic linchpin attractions, global heritage status, proximity to London, a good quality retail offer and walkable historic streets.

- ✓ **Targeting the right segments that support local jobs and services as well as bringing positive community benefit -** For example the junior EFL market is decreasing but the adult English language market is showing signs of growth(especially from markets like China & South Korea, though numbers are still small).
- ✓ **Target visitors who are already interested in the city's product**– With limited marketing resources, it is important to always ensure that your current visitors are getting the best quality experience, as they are actually your most productive marketing channel, actively making recommendations to friends.

- ✓ **Encouraging visitors to stay longer to enjoy the city in the evening** –Independent day visits and groups that aren't based in city centre hotels will generally leave by 4.30/5pm, even car and rail based day visitors generally depart by 6pm. In order to encourage the day visitor to stay for the evening the marketing platforms need to be more proactive in showcasing a lively, vibrant city at dusk/evening and work with nearby accommodation bases.

- ✓ **The importance of great images** - Images on the website and social media platforms need to showcase the experience rather than just document the product and tell the story of how the visitor can for example enjoy a ghost walk before dinner or discover a local music venue. If you don't show people what they might be missing, they will miss it!

Who visits and why? **The Domestic Market**

'ME' Timers

Kids are at Uni/ over 21. Keen to take multiple short breaks per year and probably have already visited the city.

They love the heritage but are also interested in the cultural offer and can be great advocates for word of mouth promotion. They are looking for good quality accommodation, leisure shopping, food and drink and a little bit of relaxation .

Press, Social Media - mainly facebook and Twitter

Generally over 50 - they are already coming and represent the largest travel segment in the UK.

VisitEngland 2016 segmentation - Country loving traditionals 30% of UK market

HISTORY HUNTERS

Information hungry, this is a segment that wants information at their fingertips.

Based in London/ SE they are looking for day trips and short breaks that engage, educate, entertain and are easy!... They love Horrible Histories TV.

They love events and activities where they can really experience the destination like a local .

They love to boast on social media about what they do as a family!

They represent about 12% of the UK but could be encouraged to stay longer and repeat visit.

VisitEngland 2016 segmentation - Aspirational Families - 12% of UK market

'DOWN' Timers

Time poor but still manage to plan and get away, more likely to be young, free and single.

They love something different and are always looking for insider info. They tend to book travel and accommodation (*love airbnb*) but then 'wishlist' info about the destination so they can decide in situ.

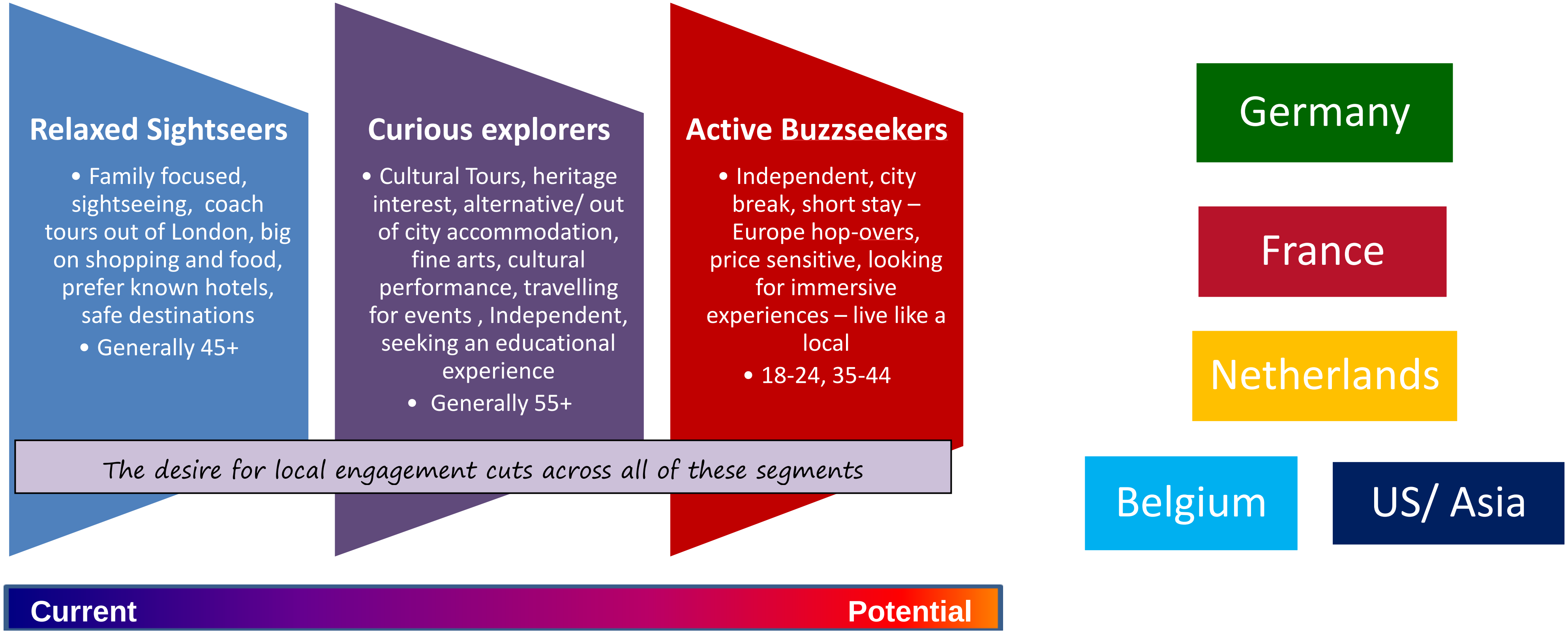
To gain their attention you have to give them a reason to visit.. invite them to a gin festival, be a pilgrim for a day etc

They are very active on social media, especially Instagram. They are also a fresh pair of eyes on the product and could play a major role in shifting perceptions about the city.

VisitEngland 2016 segmentation - Free & Easy Mini Breakers 26% of UK market

- *Although age groupings are referenced, age doesn't define how a visitor interacts with a product. It's now all about attitude to travel, how the visitor wants to interact and take part. Visitors now want to be recognised for their interests rather than their age.*

Who visits and why? **The International markets**



KEY FACTS: Canterbury benefits from a high level of awareness from near European markets. Key factors such as accessibility, connectivity and proximity to London, places the city in a position of strength.

The city receives the highest number of overnight international visitors in the county, (growing 6% from 2013-2015) and spend per head is considerably higher than their domestic overnight counterparts.

Top inbound markets for Canterbury are Germany, France, The Netherlands and Belgium - all of which are attracted by its cultural heritage. They all enjoy shopping, meeting the locals, going to museums and galleries and visiting historic buildings.

Groups market

Schools & EFL Students

- Although educational groups are a small segment for the UK, they form a substantial contribution to the Canterbury groups market, with 7 language schools located in and around the city.
- Leading city attractions cater for this segment well, however to maintain this business, group organisers need detailed information provision for the overall city with good quality coach parking. *Dwell time for EFL is between 4 hours - several days.*
- With a majority of UK language schools being located across Kent, Sussex and London, Canterbury is an easy accessible day trip They are looking for an educational, fun and safe experience; they are a digitally connected group who want to engage and share the product. They also have a 63% chance of repeat visiting within 10-15 years.
- The EFL Junior market has recently shown a decrease, however adult language groups are on the increase; they want to engage more with the destination and have a higher expendible income.
- Linking museums & gallery content to national ciriculum content and more engaging media delivery such as Horrible Histories can also help to engage local school groups especially for attractions like The Beaney House of Art and Knowledge and the Canterbury Roman Museum.

Day Excursion/ Short breaks

- The majority of business is day trip excursions from London and Dover for international visitors.
- Dwell time in the city is generally 3 hours where the average tour combines 3 locations and Canterbury is traditionally partnered with Dover or Leeds Castle
- Developing a good working relationship with the operators and carriers is vital - feeding information about new or underutilised product to the tour designers, is a great way to get an attraction or event on the map, such as the Christmas market - however this can take between 6 months - 2 years to bring to fruition.
- Fluctuations in the exchange rate can also throw up new tour opportunities for proactive destinations. For exampl: The current exchange rate with the Euro has seen an increased number of shopping coach trips from France and Belgium.

Land tours

- Cruise land excursions from the Port of Dover offer a significant opportunity for Canterbury.
- The average large cruise ship will commission up to 35 coaches for land tours - by working in partnership, Canterbury and wider Kent attractions can schedule itineraries to aid footfall management, so splitting large groups across mulitple locations at any one time. Becoming part of the the VisitKent cruise partnership would offer direct contact to the industry.
- Work directly with the tour planners. lead-in time is 6 - 9 months in advance, as cruise terminal bookings are set way in advance.

Bringing the visitor and knowledge economy closer

Key insights

- Canterbury has 3 Universities - The University of Kent and Canterbury Christ Church University are worth £909m to the Canterbury economy.
- The off-campus expenditure by students from Canterbury Christ Church University and the University of Kent adds £280m to Canterbury's economy and generated 2,447 jobs in the city (full-time equivalents)*.
- In total the Universities and their students generate 9,900 jobs in Canterbury.
- With nearly 37,000 students across the city, during term time the population almost doubles. A vast majority of students come from SE England and London, with 8-10% international. When selecting potential universities, undergraduates list Canterbury's historic appeal, proximity to London and safety as positives. The lack of a large music venue and no local football stadium are a slight negative.
- The number of times a prospective student may visit a university varies, but in general they will conduct a pre visit on either an Open Day (run predominantly from May – October) or and Application Day (run from Nov – April)
- At present the % of visiting friends & relatives (VFR) business around the student population is relatively low, falling below the Kent average of 35%
- For many students, university is the first time they will have lived away from home, as a result many return home frequently in their first year.
    - These return visits coincide with the off peak tourist season , where hotel/ guest house occupancy falls from an average of 76% to between 40-60% and restaurants and theatres have avalability.

The Opportunity: VFR – The Big Invite

- There is the opportunity to run a series of targeted weekday/ weekend promotions to invite families and friends to come and stay in Canterbury. The promotion which could be incentivised for the resident student could run on a designated social media platform of potentially via MyCanterbury.
- A series of voucher codes offers could run with restaurants, cafes, accommodation, the Marlowe, retailers and even beauty services.
- Offer periods would be agreed so as not to clash with key Uni/ city events. Such a promotion could run for a set period or around specific days such as Application days.

Showcasing the knowledge economy adds vibrancy to the destination brand and positions Canterbury specifically as a living/ working heritage city investing in the future and by valuing the students, the city will have a repeat visitor for years to come..

Source: **The Canterbury Christ Church/Kent report - Viewforth Consulting Ltd*

3. Positioning Canterbury as a first class destination

Focus on the key messages; improving product quality and channel efficiency.

Destinations that have a clear and engaging product that reflects the visitors' interests and lifestyle preferences will have greater cut through. The consumer is looking for more info, so they can make informed choices and instantly blend in like a local. They want to receive the information on their preferred channel in a way that relates to them as an individual.

Brand

How we talk about it

- The brand Shared Story developed in 2013 offers a good foundation to build on.
  - Key questions now are:
  - Does the brand story encapsulate the entire product on offer?
  - Is it reflective of the consumers desire to find a more immersive and engaging experience while on holiday?
  - Does it celebrate the city's achievements (visitor/ live/ work/ study/ invest?
  - Does it create a 'reason' to visit?
  - Does it raise awareness of the breadth of product experience in the city..... Is it working to change people's perceptions?

Product

What we talk about

- Visitor perception of Canterbury is heavily skewed towards built heritage.
- The customer is looking for experiences that are authentic, fun and entertaining.
- broadening the product offer from Heritage to Cultural Heritage, allows the story of the people behind the buildings to come through
- Gaps - Evening economy and Pilgrimage
  - **Cultural heritage - Example**
- From playwrights at The Kit to poets at the Gulbenkian.
- River tours rowed by 2nd year law students... from Canada.
- Getting off the beaten track by walking the Pilgrims way into the city
- Taking time out for coffee and home-made cakes at the Goods Shed or Kitch
- Searching for signs of the 'Rotten Romans' on a half term history tour.
- At the moment the breadth of the product is undersold and undertold

Channel

Where we talk about it/ Who talks about it

- The Destination website & 3rd party content:
  - The web platform needs to deliver more content that focuses on the needs of the visitor.
  - The site needs to have a clear narrative so it can be instructive, bold in content, and current - supporting a 'why visit now' message.
  - Ensure that the site works for both the trade and independent user.
  - It needs to inspire as well as inform showcase the breadth of the city offer with bold and engaging images
  - There needs to be a social media and third party content strategy
  - Refreshed seasonal content that promotes the core events programme
  - Use social media to engage with the visitor in situ via greater use of set hashtags
  - Engage with print media/ bloggers and influencers by working in partnership with VisitKent

Reaching the independent visitor

One of the core objectives for the 2018 DMP is to grow the overnight stay market, this comprises of predominantly independent / small group visitors. Research indicates that above all others , the needs and expectations of this visitor are changing:

- In the recent destination perceptual research, the main reason given for not choosing to visit Canterbury was that '**they didn't have a *reason* to visit**'. Visitors need a reason whether it's to entertain the kids over half term, engage in some retail therapy, or get a culture fix by attending an event or performance; they choose a destination because it meets their need. Therefore the destination communication, whether on social media or via the Destination Management Organisation (DMO) website needs to tap into these common needs and offer solutions.

- Key trends indicate that **the consumer is actually becoming increasingly difficult to reach**; cocooned in their social media bubbles they are more likely to be influenced by their peers or a Tripadvisor review. However once the destination is on their radar, they want to know everything about it, so that if they choose to go they can blend in seamlessly. They want to know where to get a great coffee; when's the best time to beat the crowds at the big attractions, and how to get the best deals. If a destination is going to keep up with these savvy segments then the brand has to be bold to grab their attention and the product information delivered online and across social media has to be like having a 'local' in the palm of your hand.

- The **Visit Canterbury website has to be richer in content**, every visual used needs to reinforce the brand story, constantly confirming a reason to go. The city's big events need to be trailed weeks in advance, engaging those visitors who may want to attend, reinforcing the message that Canterbury is a great city with a full events programme. Headline events have to be more than just a listing; they are an attraction in their own right.

- The DMO website, social media feed and print are only one aspect in the mix, **to get the maximum amount of eyes on a broader array of the Canterbury offer, every possible platform has to be working in the interest of the city**. Third party platforms such as Tripadvisor, hotel sites, and travel trade operators are all talking about Canterbury, many would welcome rights-free imagery and new reasons to visit.
- **For this to be effective the information has to be targeted**. For example: Airbnb deliver targeted, area specific information from an insiders perspective. They know their customers are always looking for something different. In doing so, they create a reason to visit and stay with one of their hosts.
- **Canterbury has a high** awareness level with the over 45 age group, but geographical knowledge, let alone an understanding of the product changes significantly with Gen Y and Gen Z.

- The other **important channel for information delivery are the people who work in the city**. The 3 Canterbury ambassadors deal with around 3,000 visitor enquiries on the streets every month. but with over 100 restaurants and cafes; more than 20 large accommodation providers, tour guides, boat operators as well as the centrally located VIC, there is a potential for front of house staff to become 'ambassadors in waiting'.
- Canterbury consistently scores well on welcome, and international visitors continually reference 'meeting the locals' as a highlight of their visit.
- In the last 18 months VisitEngland and VisitBritain have introduced the use of digital ambassadors to engage and inspire potential visitors. This approach could work really well for Canterbury, local residents, students, cheese sellers, cafe staff, artists, graphic designers.....could be asked to offer their tips and suggestions to get the most out of Canterbury. In particular, it is great to get tips and suggestions from overseas nationals who live in the city.

Digital ambassador programme:

- Add a personal approach to web content
- Reinforce a welcome and inclusion message
- Showcase some of the more hidden areas of the city
- Showcase a wide and vibrant population

- In general we travel because we like meeting people, this gives the visitor the opportunity to meet the people of Canterbury before they arrive. Also choosing people from the education and business sectors also reconfirms that Canterbury is a great place to Live, Work, study or start a business.

Canterbury's Product Landscape

Heritage cities need to focus on broadening the visitor understanding of what is on offer – telling them something they didn't know about established attractions and introducing something completely new, to entice repeat visit.

In the District...

3 Universities -
37,000 students
7 Language Schools

13 Cinema screens

417 retailers
46% Independents
(that's more than Bluewater @330)

6 Headline events (Apr to Oct)
10 local events every day

6 Museums
7 Art galleries
6 Theatres
1 castle
1 Abbey
1 Cathedral &
24 Canterbury Tales

In the City...

20 hotels/ inns/ large guest houses
701 bedrooms

34 places of worship

UNESCO World Heritage Site status since 1998

4 West End blockbusters in the last 2 years

Home to:
Bagpuss
The Clangers
Ivor the Engine
Rupert the Bear
Chitty Chitty Bang Bang
&
James Bond

1 million flowers displayed in 340 hanging baskets

2 global pilgrimage routes
1 national trail

3 ambassadors helping over 3000 visitors every month

40 qualified guides
1 ghost hunter

2895 listed buildings
53 monuments
9,000 heritage assets
&
2 pending wrecks!

Over 130 cafes, restaurants & pubs... and that's just in the centre!

3km of waterways
30 bridges
5 escape rooms

5 miles of Christmas lights

8 saints
4 Playwrights
1 poet Laureate...
& 1 Black Knight

2 Registered Parks
97 Conservation areas and 1000's of acres of Beautiful Countryside to explore

Why do people visit:
1. Heritage 83%
2. Shopping 49%
3. Culture & Arts 44%

Over 70 AirBnB homes in and around the city

Taking the Brand off the page

The shared story still stands true, delivering an atmospheric, engaging showcase of the District. The core product remains unchanged however the way in which the customer want to engage with a destination brand has changed considerably

Destinations brand now live on social media, so it is vital that the Canterbury brand gains cut through visually.

The Shared Story

“Canterbury’s past is as rich as it comes” says the latest Lonely Planet guide to Britain. This world-famous cathedral city was one of medieval Europe’s great places of pilgrimage and knowledge. Today – with its international visitors and two Universities – it still has a distinctly cosmopolitan feel. Less than an hour from London, it’s in that corner of England that’s almost touching France. People come here from across the globe for world-class heritage, for culture and festivals, to visit and to study, to shop, eat and hang out. The extraordinary Cathedral dominates the medieval streets within the city walls. Among the listed buildings, a boldly modern theatre – named after the city’s famous son Christopher Marlowe – has been built on the river bank, and an art museum has been restored and doubled in size. To the south is St Augustine’s Abbey, part of the World Heritage Site, and England’s first seat of learning. There’s something warm and mellow about this intimate European city. Crowds throng around the entrance to the Cathedral and in the busy high street. Thousands of students add to the vibe. It’s lively and fun. But it’s also remarkably easy – in a moment – to step off the beaten track into some quiet oasis where you’ll hear nothing but birdsong, and the splash of oars on the narrow, gently flowing River Stour. You may be in a city, but you get a strong sense of being in the Garden of England too. There are riverside gardens and even a cider-making orchard within the city itself. Then there’s all the local produce in cafes, pubs and restaurants: Romney Marsh lamb, Kent cherries, ale from local hops, award-winning fizz from Kentish vineyards. To the north of the city is one of England’s largest ancient woodlands, the Blean. And, less than a 7-mile cycle away at Canterbury’s coast, there’s the seaside town of Whitstable, for England’s finest oysters.

Image is everything

When people hear information they are likely to remember only 10% 3 days later – show them a picture of the same information and they retain 65%.

Source: Vison trumps all other senses – research paper 2017

For a destination to cut through the noise and competition, good quality visuals are vital, as the consumer will often review several destinations before choosing a final day out or short stay. At this first stage of interation, it is the emotional engagement with the image that encourages dwell time on a website. Increasingly visitors are turning to social media rather than destination sites for their inspiration. With over 1 billion users worldwide, Instagram is now the 'modern day' travel agent and the user generated contents sets the bar on image quality.

As a heritage city rich in content, Canterbury definately has the product to shine on platforms like Instagram. However, one organisation cannot solely deliver the destination image; the ownership sits across every business that engages with the visitor economy, where visuals need to be compeling and current.

To create an engaging web platform, there needs to be a greater collaboration with local businesses to continually update and refresh their visuals.

Current image sample from www.visitcanterbury.com

When people search for restaurants they are looking for images that offer reassurance of a quality experience, great food and a welcoming atmosphere, yet so many destination site images portray empty restaurants with no food!

Businesses should continually refresh their visual content on the destination website and use their customer's instagram posts as a benchmark for customer expectations.

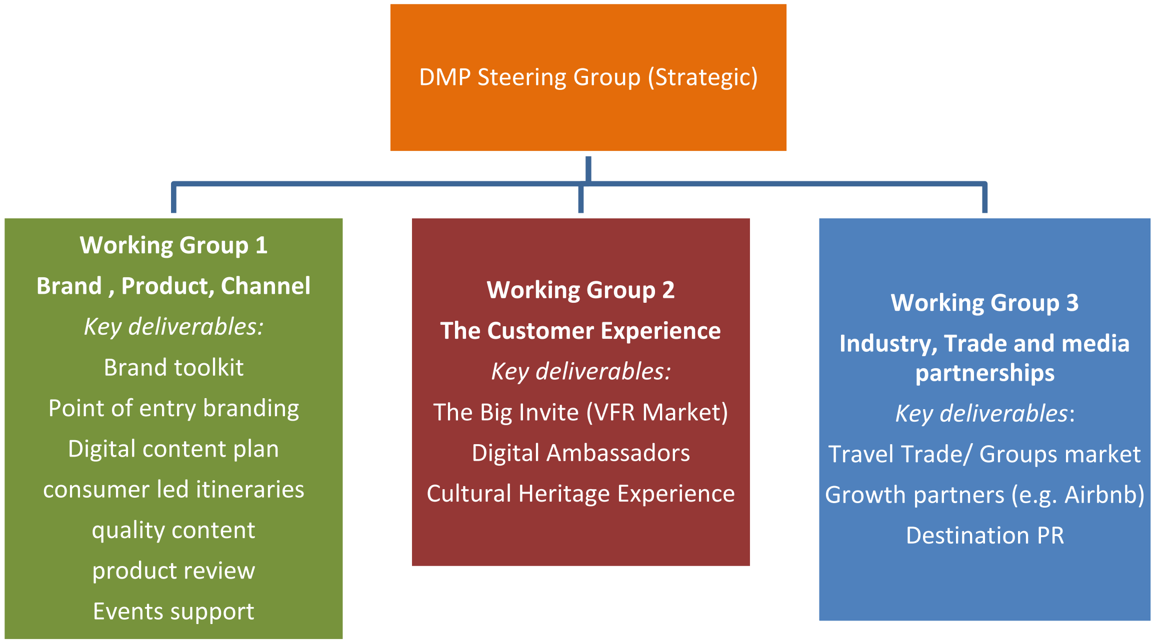
By comparison, the following image montage panels showcase Instgram content generated by the visitor:

4 . Next Steps

Working together to deliver the best results

A successful destination management plan is reliant on shared ownership. As with many other destinations, aspects such as event delivery, destination publications and the consumer facing website do not necessarily sit in the same place. It is therefore vital to establish a clear working structure right from the start; allocating budget, delivery responsibility and agreeing key milestones.

As a majority of the delivery will sit with either the BID or Visit Canterbury; it would be advisable to establish core working groups with representatives from across the business sector.



The most effective way to deliver the DMP is to:

- Encourage a cross section of the tourism, educational and business sector to get involved

  For example: by adopting the brand; getting involved in the Big Invite promotion; becoming a digital ambassador or commissioning imagery to enhance the destination website.

- Work alongside Visit Kent and engage them as the Countywide DMO to offer support and direction when liaising with travel trade; working with 3rd party digital platforms such as Tripadvisor or coordinating press activity and campaign content with either VisitEngland or VisitBritain

Action Plan:

Working Stream 1	• Brand , Product, Channel
Working Stream 2	• The Customer Experience
Working Stream 3	• Industry, Trade and media partnerships

Working Stream 1 Actions	Date	BID Role	Partners	DMP Objective
TOOLS: Develop an 'Own it' Brand toolkit, the BID would lead on the delivery of a brand toolkit empowering the business to own the Canterbury brand: **The how to 'Own it' toolkit will assist large organisations to small businesses in how they can work with the shared story while still delivering their distinctive voice.** 1. **Capturing the city..** *Photographic guidelines...*, what are the image content triggers the consumers are looking for? Who is looking for what... and what makes a distinctive image. 2. **Telling your story**... as part of the Canterbury story. Guidelines *on tone of voice*/ people stories/ peer to peer recommendation (Reinforcement of core cultural heritage offer: e.g. Quality, uniqueness, individuality, authenticity, something different, people stories, inclusiveness and welcome) *WHY do this*? Integrating and managing a city wide brand requires extensive resources... people have to feel it is really *their* brand to ensure success.	2018 - 2020	Co-ordinate the **Own it** – toolkit – this could be rolled out at your AGM?	*This may require a review of the current VisitCanterbury guidelines, CCC and key influencers in the BID are key Partners*	*Working in partnership to deliver a distinctive brand.*
Phase 1: Review the current Brand story – break down the brand into component values – review all current imagery owned by the BID to produce a core 50 images for media, travel trade and third	2018/19			

party sites use.				
Phase 2: Review the city product and what your target customers are looking for. Produce a product matrix and scope how this can be used to produce a hit list of images that are missing. Circulate the hit list to local businesses/ local photographers and the universities..	2019			
Phase 3: Produce specific guidelines for different sectors – food & drink/ Bars & pubs, events, attractions – create segment/ visitor specific imagery e.g. school parties in smaller museums. Scope the must-have core image: **1. Businesses can use to support their own messages through the year;** **2. The images that you need to improve their product on VisitCanterbury.com and via social media.** **Create image clearance templates that business can download to ensure rights free usage.** **Build imagery around key themes and experiences –(relaxation, green spaces) key inbound markets (Adult language students) or key age profiled segments... e.g. Active Families**	2019/20			
Review the current on-line touch points for domestic and international visitors. **Review the VisitCanterbury/ My Canterbury/ Canterbury Culture platforms for Brand consistency and align it to the shared story:** *How could these platforms be enhanced? Are they talking to the right audiences? Are they delivering the right information? Is there digital consistency with Canterbury's marketing campaigns (Kent Contemporary).*	2019/20	Provision of guidelines for consideration to partner organisations	*Web channel owners:* My Canterbury Visit Canterbury Canterbury Culture	*Working in partnership to deliver a distinctive brand.*
Tools :The CLASH Diary Events are increasing as a part of Canterbury's core proposition; if the aim is to ensure against event overload, it is useful to establish a clash diary for the city which streams events via size and audience appeal – Clash diaries are simple closed access portals for any event organisers, once set up event organisers can self populate content. **Who uses it?** Event organiser, Official platforms – VC, VK, My C, potential use for local media.	2018/19	BID to populate current 2018 events or could this be a Canterbury culture activity.	*Canterbury Culture*	*Working in partnership to deliver a distinctive brand.* *Creating a healthy trading environment*

It also helps to cross check large events across the county to avoid wasted audience targeting.				
Phase 1: building on the work delivered by Canterbury Culture – Role out an online clash diary where event organisers can log details of their event and stream them into different categories: Headline (Canterbury Festival/ Pride), Niche national (Wise Words/ Food & Drink), Niche Local (Gin Festival), Educational Sector (Lectures & Key debates).	2018/2019			
Phase 2: 6 month review of content, develop an on-line events forum to share best practice - e.g. evaluation of events	2019-2021			
• **PRODUCT DEVELOPMENT – Consumer facing** • Review areas for product development – Canterbury attractions that have seen notable growth over the past 3 years have been experience based. Is their growth opportunity for current attractions to offer more immersive experiences? ○	ongoing	VC/ BID Attractions Working group Canterbury Culture		*Grow the city's overnight stay market*
• **Refine the core product messages/ themes for seasonal promotion** • **Develop a product Matrix aligning key product to key segments/ markets (City strengths/ underplayed offer/city aspirations)** ○ Event programming and how this supports the 365 product • Cultural Heritage – being part of the city – go local • Personal recommendation – tips from the residents. • 21st C - Pilgrimage •				
○ City Green – celebrating the green spaces/ gardens, and waterways of the city ○ Food and drink – not just the festival, but the vibrancy of the F&D independents				
• **UNESCO WHS Management** – development of a strategic plan positioning cultural heritage in the city. • Development of a work programme with the 3 key sites to raise awareness of the full UNESCO designated area – review of way marking the use of locations apps such as Geotourist to assist		BID/ VC Leading WHS		*Increase day visitor spend*

visitors. • Clear information on when and how visitors can engage with the UNESCO site by reviewing alignment of opening times with partners •		attractions		*Grow the city's overnight stay market*
Working Stream 2 **Actions**	**Date**	**BID Role**	**Partners**	*DMP Objective*
• **University Open days – the BIG invite (October/ November)** • Working in partnership with Uni of Kent and Christchurch University develop a promotions led campaign targeting potential families/ students to visit the city taking an overnight stay – offer based for low season periods for November and January	2019 - 2021	BID/ Uni of Kent Christchurch Uni		*Grow the city's overnight stay market*
• **City Marketing activity – Domestic London campaign** • Continuation of the VK London Campaign • Development of a fully monitored visitor journey from campaign to VC website with integrated campaign pages.	2018 / 2019	VK/ BID/VC		*Grow the city's overnight stay market*
• **Digital ambassador programme** • Roll out a digital ambassador programme showcasing city champions offering their insights, hints and tips for visitors • Recruit reps from across all business sectors	2019			
• **Place Management** • BID delivery of core Aims: • Improve – continued delivery of the floral display programme, Christmas lights, Purple flag , ambassador programme • Promote – My Canterbury content generation and distribution • Support – Support for local businesses • Represent – local businesses	ongoing	BID – Core Business		*Create a healthy trading environment*
Working Stream 3 **Actions**	**Date**	**BID Role**	**Partners**	DMP Objective
• **EDUCATION: Winning the lifetime customer** • - catering for Schools • – ELF and adult study students	ongoing	Working group	Attractions	*Increase day visitor spend*
• Review the current schools and EFL information delivery on VC/ Review content share with leading attractions and potential cross sell of smaller museums and galleries.				
• **CONSUMER PR: Designated domestic and International PR programmes** • Review all Canterbury content that currently sits with National and International Tourist board media centres – does the copy reflect the product and the brand aspirations..	ongoing			*Tell fresh and compelling stories*

• Capitalise on all available free PR profiling available from VB, VE and VK and Britain Images • Agree a core messaging schedule for seasonal PR stories • E.g. Christmas/ Seasonal foods/ core events/ key school holidays/ national schemes such as kids in museums. • • Outline plan examples of destination alignment to topical events – e.g. Royal Wedding.. or popular culture ' If Harry Potter came to Canterbury we think he would ....,' A new take on Pilgrimage. • Develop a PR destination plan for key anniversaries – Highlighting anniversaries 2 yrs out, targeting programmers for potential documentaries e.g. Becket				
• Dialling up Culture... • Working in partnership with city cultural organisations and events teams		VC Canterbury Culture		*Tell fresh and compelling stories*
TRADE/ CONSUMER: Getting the most out of everyone else... 3rd Party platforms, (armed with your new guidelines) make sure everyone else's platforms are working hard enough for the city: • Review content and image use on VK, VE and VB. • How do the major booking engines talk about the city – Last minute/ bookings/ hotels/ Trivago, Expedia etc.. • Tripadvisor - ask for a review report – how many people are looking at TA for Canterbury... • Own your TA platform – develop and promote visitor management itineraries e.g. 3 hours /6 hours - 2 days • Utilise the Airbnb network – help your hosts to super host status – Canterbury's Airbnb product has grown by 66% in the last 18 months and is still growing • Appealing to an overnight stay domestic and international 25-45 segment, Airbnb is exactly the right shared economy comms platform to reposition the breadth of the Canterbury offer – Develop a digital host pack – images/ content and events feed. • Travel trade Packages: How are the top UK London/ Dover outbound coach operators talking about Canterbury? Work with the product development staff to make Canterbury shine. • Why do it? They have a greater consumer reach...	2018 ongoing	BID and Industry Champions	BID/ VC/ Leading attractions	*Working in partnership to deliver a distinctive brand.* *Increase day visitor spend*
Review programme of third party site content.	2019-2011			
TRADE/GROUPS MARKET: Develop a small working group with an appointed industry champion (CC/ CT): • More suitable ticketing will lead to greater usage and potentially a better service provision from	2018/19	VC with BID Support		*Increase day visitor spend*

the franchised facilities. • Know who's coming – 60-80% of your coach operator business is covered by 20 – 30 UK and near European operators	ongoing			
Review Coach operator quick wins - Ticket structure to encourage greater use of the coach parking facilities the 5 hour ticket (Most coach operator stay is 3-4 hours, yet their ticket option is 24 hours). Useful info pack – develop a digital info pack for the coach operators working in partnership with core attractions – co-ordinate a rights free image base for trade use. Coach park branding and public space management - walking route review/maintenance.	2018-2019			
• Cruise Opportunity: Account manage the tour development reps for the leading cruise companies that have scheduled births at Dover (2019 dates are already scheduled) develop a tour package to manage cruise ship opportunity.. positioning both am/pm slots • Product development – explore opportunities for Canterbury to position the city as a near European shopping day trip destination.	2020-2021	Cruise – BID with VK support		*Increase day visitor spend*
A Living Document • A majority of DMP documents are read and then filed. Keeping the DMP current and the brand cohesiveness alive is key	2018 onwards	BID lead	BID Members	*Working in partnership to deliver a distinctive brand.* *Create a healthy trading environment*
Develop a DMP update e-news or add a DMP component to regular e-news comms to BID Members to encourage a 2 way share:	2019 - ongoing			

Appendix1 – Destination SWOT analysis

Strengths		Weaknesses
Established Tourism destination profile both domestically and Internationally for Near Europe. Recognised as a strong heritage experience for school and student groups and empty nester 55+ independent travellers.		The negative side of a heritage based destination is that they are seen as '**been there done that'** by visitors, therefore events and new product are increasingly important to engage the visitor to repeat. The City is also predominantly seen as a day trip only
No. 1 Destination within Kent - Established as a heritage city		Although the **cultural offer** is growing, the breadth of the offer is still predominantly reaching Canterbury residents/ 25 min drive time audience.
High Profile lead attraction – Canterbury Cathedral -part of the designated **UNESCO** world Heritage site since 2008. *Note 2018 marks 30 years of UNESCO status*		Mediaeval Street network /partial city wall and compactness of city centre can be **restrictive for destination offer development** in the form of both attractions and accommodation stock.
Retail offer – National brands that appeal to all segments based in and around the Whitefriars area, as well as independents		Popularity of Canterbury as a **school trip** destination causing street clogging especially during peak summer season.
Established Events Calendar running from April - October		**Parking –capacity** of city centre parking in peak season/ Christmas.
2 established **Universities** – both embarking on a 10yr + growth phase		Coach Parking – Although capacity is good, **facilities and ticketing** are perceived as a weakness
Geographical Location – Proximity to London and Near Europe		Perceived audience profile dominated by **lower spending visitors**
Strong appeal to **Educational** groups – EFL, Schools and emerging adult EFL		**Seasonal** nature of tourism employment
Photogenic strength of the city – heritage cities benefit from the continual layering of historic detail and a unique light due to the design and overhang of Mediaeval buildings.		**Continuity of brand** delivery across all main visitor touch points. Consistency in delivery from above the line marketing, to city branding and online/ social media delivery.
Easy walking city due to the compact layout of mediaeval streets		**Dominance of the central heritage attraction** and the current decline in footfall traffic to the museum and gallery offer in the town.
Development of **experiential attractions** such as the Boats/ punts tours/ Ghost Tours and escape rooms over the last 5 years		Co-ordinated delivery and **connectivity between the 3 components of the World Heritage Sites** – Lack of awareness of the 3 component sites
Established **BID**– overseeing place management		Lack of central music venue or city sporting offer (*although the cricket offer is underutilised as a visitor experience)*

Opportunities		Threats
Nurturing the growth of the **international overnight stay market**		**Declining Local Authority budgets** and staff resources dedicated to the visitor economy – No active Heritage/ Cultural strategy for the development of the cities offer.
The consumer is changing – not only what they are looking for but who is looking to engage. Kent is seeing growth beyond national average for the **25-45 age group**... is Canterbury talking to this Gen X /Y segment.		**Reduced inward Investment** in core accommodation provision and development of new visitor experiences
The ELF/ international study market is changing – there is a shift toward **adult education groups**, especially from nr Europe and Asia, this segment spends more and stays longer and have a greater interest in the historical context of the destination.		**Diminishing levels of marketing resource** against the backdrop of reduced local authority funding. Continuity of city communication across marketing campaigns; web content delivery; Social Media, key PR messaging, and points of entry branding/ signage
Peer to peer marketing is notable the fastest and most effective way to raise a destinations profile. Consumers are actively talking about their experiences via social media, they not only wants to document where they have been, but want to boast about their specific experience.		**No new attractions**. Kent has already seen a slight shift in destination share towards Thanet following the coastal regeneration and in establishment of new visitor attractions over the past 5-10 years.
Canterbury residents love and cherish their city and are a ready-made resource for providing city tips and suggestions throughout the year.		Increasing uncertainties around **BREXIT,** research conducted by VisitBritain in 2016 indicated that key markets didn't feel it would alter the decision to choose the UK. However, additional research in 2017 has highlighted that near European visitors are voicing concerns over ease of travel and cost implications.
Canterbury has seen a 66% **growth in AirBnB** properties for rent over the past 2 years. The shared economy is set to grow and is increasingly the preferred choice for high spending 25-45 leisure visitors who are looking to engage with the wider destination offer.		**Growth of competitor UK Heritage city destinations** – based on international visitor trends York, Bath, Brighton and Nottingham all show consistent growth with a focus on repositioning the city product for short stay market
The Group visitor traffic has shown stability over the past 10 years, especially from near Europe with both Eurotunnel and port of Dover mirroring constant traffic over the past 10 years. New business potential exists in both **Near European shopping trips** and increase integration of Canterbury on **cruise itineraries.**		**Exchange rate fluctuations** and increasing concerns over **destination safety** for visitors. Visitor figures to sites of religious interest have been affected by the current terror threat – in 2015/16 this had a notable effect on all working Cathedrals/ Abbeys. However recently released 2017 figures have indicated bounce back on all top 20 religious attractions except Canterbury.
Canterbury has approximately **30,000 students** which practically doubles the city's population – **VFS** could offer off season travel opportunities, but there is also an opportunity to encourage potential students/ families to visit and stay in the city around **open days** and homestay.		Repositioned and new development of Kent product. Although Kent is on a healthy growth trajectory there is **internal competition for market share.**

Appendix 2

Future Trends - considerations for the delivery of Canterbury as a destination to domestic and international visitors

Global /National factors for consideration.

• The long term **Economic trend** is that global affluence continues to rise, the middle classes will continue to grow, leading to higher demand for tourism product. By 2025 it is forecast that China will overtake the Eurozone with 16% of the global GDP... by 2030 66% of the global middle class will come from Asia. – Oxford Economics 03/2017,OECD Observer
• A destination that identifies its **distinctive qualities and experiences** will stand out in an ever expanding global marketplace.... this distinctiveness must be emulated in the on-line delivery of a destination, as it is forecast that by 2023 63% of UK citizens will be purchasing their travel and accommodation on line *– Eurostat survey on ICT usage 2016.*
• **Connectivity** and the desire to immerse oneself in the local culture/ feel like a local are 2 significant factors when targeting international visitors; of the top 10 inbound markets to Britain, 8 are European. Of Canterbury's target markets; France, Germany, The Netherlands and USA are in the top 6. All of Canterbury's target markets express a strong desire to **'go local'** and immerse themselves in the culture. *– IPS data, Decisions and influence research VB 2016*
• **The traveller is becoming ageless** and by 2040 Europe will become the first continent where citizens under the age of 24 will be smaller than those over 65 – people are retiring earlier and rediscovering their youth, often choosing to revisit destinations – it is important to talk to the consumer based on how they want to travel rather than the age they are.... this is already affecting key industries like EFL where there is an increase in adult attendees. *– UN population division 2015*
• **The Solo traveller is one of the fastest growing categories**, they are looking for life enriching experiences, they will often look to upgrade or extend their stay to achieve a unique experience... these are just the type of traveller who are engaging in pilgrimages along the Camino in Northern Spain.

Appendix 3 – Consumer trends analysis

Inspiration & Pre Planning *Although we have access to more information than ever before, what we actually receive is increasingly refined.*				
The Trend	**What it means**	**Opportunities for Canterbury**	**Challenges for Canterbury**	**Market/ Segment Insights**
The Future Bubble **The challenge of reaching your target customer**	Our information feed is continually filtered based on algorithms; the people we are friends with; influencers and companies that we follow. For destination, breaking through the filter bubble is about getting the right product message in-front of the right customer – Destinations have to reflect their customers in their content and brand... being a 'catch all/ something for everyone ' increasingly doesn't work. Destinations need to be clear about what product they really have; know who they really want and find the product (even if it is niche) to meet the customer's needs. Be relevant and align to your customers motives to travel.... then your content will be shared.	Canterbury has an established Heritage offer and a good, but possibly underplayed cultural product. Visitors are increasingly looking for 'experiential' product, e.g. going behind the scenes at a heritage attraction, having a 'hands on' experience... The goal is to get the consumers to talk about the uniqueness and quality of the Canterbury experience. Equally this experience needs to be brought to life via the city websites and social feeds... it is important to paint the picture rather than just list the attributes.	Destinations need to work harder now than ever before to get their product information in front of a would-be customer. Increased use of 3rd party platforms, media/ press delivery and engagement with bloggers and influencers will help. Making the city product current, capitalising on media angles such as – a new series of Horrible Histories and centenary celebrations will all help.	All segments find themselves in this bubble to a certain extent... yet the most filtered are the under 45s
Maximising Behaviour **The Consumer is now Value Savvy**	Over the last 10 years the global consumer mindset has become more focused on value (not necessarily price) – increasingly people do not book direct with a hotel, but instead cross check several different platforms to ensure the best value (Secret Escapes, hotels.com, Trivago).	The city very rarely talks about value in relation to the visitor experience. Profiling the activities on offer that the consumer is searching for... *The consumer wants to maximise their time in a city based on their personal preferences... Destinations need to recognise that 'catch all' suggestions and information no longer meet current consumer needs, especially if the destination wants to engage new segments.*	Canterbury needs to agree a product matrix and target messages. Visitcanterbury would need to be more consumer driven rather than paid for entry. The itineraries need to highlight the benefits of staying on/ staying later creating a sense of FOMO(fear of missing out).	*All segments are not the same...* Youth - Price is still important or this segment, they will save on transport and accommodation so they have more budget to spend on experiences/ evening economy. Families – Value is important along with

		Canterbury needs to offer options: What can I do if I have: 1 hour, 3 hours, 1 day, 3 days... when delivering this information don't just offer 1 option per time category.... The consumer wants to know that if they stay longer there is enough to do... The more experiences on offer the more desirable the destination... the greater the possibility to extend stay.		comfort and ease to ensure they have a fun and educational experience. 45+ - Value and quality of service are important, as well as seeking out new experiences. As a result, all segments now spend more time on planning and research than ever before.
The Death of Risk **Visitors plan more to be informed**	Because the consumer wants to achieve the maximum from a destination (*value for money; immersive experiences; going local and finding the hidden gems*), it has led to less risk taking. The emergence of low cost airlines from the mid 90's fuelled a 'book now, go now... worry about the detail later' mentality, where travellers explored 'on the hoof', with limited info. Multiple short breaks are now replacing the 1 main holiday a year. The factor that hasn't really changed is the % of leisure time we have.... **so as a result the prospective visitor PLANS.** Consumers now spend more time on planning and cross checking before booking than ever before, we all want the insider tip;, where to get a best coffee etc.... The Consumer wants to be well informed, this isn't just because they want to maximise their time in the destination, but it offers greater reassurance on underlying safety in light of recent terrorist attacks. Consumers looking to stay overnight want to feel like they know the city before they even arrive.	Canterbury is a safe city. Its mediaeval construct and road network mean that the city centre is compact and walkable. This messaging is underpinned by the presence of the 2 universities (Oxford is constantly seen as a safe city by visitors due to the student pop). In addition, the city has purple flag status. One of the key objectives for the destination management plan is to encourage overnight stay, to do that the city has to reconfirm the breadth of its evening economy – fuelling the desire to stay longer..... this message needs to be constantly reinforced. York encourages people to see the city at Dusk, to walk the wall and take time to revisit the key historical buildings as the light changes. Make it personal – People love to gain insight and tips from people... there is an opportunity to use residents and local business to offer their top tips.	This all comes down to how the city talks about itself and the quality of the information it provided. A good selection of point of day photography, showcasing the city from day to night. Capturing the mood and sense of welcome and inclusion. This type of destination messaging needs to be integrated across all channels – offering visual confirmation and reassurance across web and social media. Engaging with key influencers and media channels to paint a wider picture of how and what visitors can get from the city.	All segments/ markets now plan... even if they book through an operator. Even visitors travelling by coach out of London or from near Europe, will research a destination before arriving so they can maximise their time. This increases the importance of engaging the consumer at pre planning as it is increasingly harder to sway them once in destination.

The Booking Process – *More time planning, less time booking*				
The Trend	**What does it mean?**	**Opportunities for Canterbury**	**Challenges for Canterbury**	
Wishlisting **Collating info at the planning stage so they can make informed/ last minute decisions about want to do** **Conversational Commerce** **The opportunity to be able to book direct from social media and web itineraries** **Impulsive Existence** **Fear of missing out**	Consumers increasingly want to know everything before they travel. The general trend is to book key components such as accommodation and transport in advance to make savings, but book the micro level once in location...this is known as 'wishlisting' and enables them to collate all the info beforehand so it's ready to go at the touch of a button - this way they can change their mind to get the maximum experience out of the destination. . Some attractions and accommodation providers now offer bookability direct from social media platforms such as instagram to ensure they don't just stay on the wishlist. Also some destination sites offer personal itinerary planners with a bookable function e.g. VisitScotland. With all of this information to hand and the ability to make final decisions instantaneously in destination, it overrides the fear of missing out on the best experience. This approach enables the visitor to change their plans to suit the weather or to jump a queue. **(analysis released by Trip Advisor has shown that the most savings when booking accommodation are made between 1-3 months in advance – 2.05.18 TP best time to book report).*	This trend to book attractions, tours and excursions while in situ could benefit the core heritage attractions and could be used to offer discounts on smaller attractions. e.g. When booking your tickets for the Roman baths in Bath, visitors are offered the opportunity to purchase combined tickets for smaller attractions like the fashion museum..... other heritage cities offer incentives and discounts when booking in advance, but also when booking on the day. There could be an opportunity to pilot a 'Canterbury offers' promotion in the form of a simple Canterbury Pass, especially if this could be used to incentivise travel away from peak summer periods. Could this trend to book the micro level while in location help cultural events who can't confirm their final listings until a few weeks before hand?	Opportunities to combine tickets the whole UNESCO site are complicated due to variations in opening times/ days and the need for multiple organisations to joint ticket. At present the consumer needs to book individual attractions.... Is there potential to accommodate this under the new Cathedral advance ticketing system? Could there be at least an opportunity to cross promote smaller attractions/ discounts on the back of a cathedral booking?	

Connected Travel – *How connected are you to your customers once they are in the city?*				
The Trend	**What does it mean?**	**Opportunities for Canterbury**	**Challenges for Canterbury**	
Locational Living **All the information in the palm of your hand**	Increasingly visitors are using their smart phones to deliver instant destination information. Companies like Geotourist.com who use GPS location data enables destinations to upload tours in different languages on any given subject, from Medieval architecture to graffiti walking tours. This flexibility allows the visitor to explore a destination independently, and also offers the opportunity for businesses to feature along the walking routes..... Great places to stop for a coffee/ lunch in a historical building.	The Geotourist app has been used effectively by Historic England to bring to life the heritage in situ for different periods of history, taking it out of the museums and attractions and onto the streets. This would be a great way to bring to life specific periods of history within the city, this type of real time mapping can link in smaller attractions and can encourage dispersal of visitor groups - especially if it was used as an educational aid.	The more the visitor is empowered to independently source information 'in'destination, the more it will call into question the role of the Visitor Information Centre. A more in depth understanding of how the customer uses the VIC in the city is vital. At present footfall is calculated for the building a more indepth breakdown is needed to show how many people activity engage with the service... and what they purchase.	App based information delivery is increasingly popular with Chinese inbound visitors and educational groups.
Performative Perfection **Added Social Value – Does your destination help your customers brag on social media?**	Consumers live out their lives on social media, increasingly so in relation to travel; experiences and capturing time with friends and family. Therefore even though it isn't the deciding factor for choosing a destination, a cities 'Social Capital' supports the decision. The visitor will look at their friends posts and say – 'I would like to go there' but in fact they are registering the social capital and creating the desire to put themselves in that location/ that social media post. Key questions for any destination are: 'Are we shareable'? Do we add to our visitor's social capital? Do we make it easy/ highlight where these great SM opportunities are? Do we know which segments value social capital?	Canterbury has a high % of English Language students and group visitors under the age of 25 – this is a group that engages with and will seek out social capital opportunities – i.e. The 'Must list' for Instagram posts. These aren't necessarily just the big attractions – a destination can create a buzz around different areas that create the perfect backdrop. The light in the city offers a unique photo opportunity and also assists with positioning the city as an overnight destination. Different segments seek out different experiences and backdrops to add to their social status: Students post – friendship, togetherness, fun, and popular culture e.g. there are many Canterbury posts related to Harry Potter, even though there is no direct link to the city.	The challenge for Canterbury is the concentration of footfall traffic on core streets by educational groups. Profiling locations with high social value could encourage different walking routes around the city centre. Concepts like: Instagram time travel – '2000 years in 2 hours' can act like a sharable historical treasure hunt. Social capital also needs to be topical.... suggested sites need to be regularly updated the benefit from popular culture trends: E.g. The Shambles in York has a Harry Potter shop which regularly features on Instagram. To support this positioning, the city would need strong photography and encourage a programme of key influencer visits.	This is particularly relevant to Generation Y and Z across domestic and international markets (though gen X 35-45 use social capital in relation to family travel)

Mastery of the mind **Consumers are actively looking for opportunities to find 'down time'**	The growth in consumer interest in mindfulness is now impacting on what we choose to do in our leisure time. Increasingly the visitor seeks holiday moments with reduced digital interruptions. Relaxation and escape have always been a strong motivator for travel... visitors want to dip in and dip out of different experiences so they can relax and enjoy the now as well as see the big attractions.	The reality is that Canterbury is probably one of the oldest destinations in Britain to offer this! Pilgrimage paved the way for Canterbury's tourism industry, where the surrounding landscape with key routes such as the Pilgrims Way/ North Downs way and the Via Francigena still have huge appeal. A combined walking/ city experience has potential for further development... It has the potential to appeal to all age groups and offers the opportunity for Solo travellers to join an experience whether it is walking for a whole day or just a few hours.	Establishing this product and additional way marking are the main challenge... pilgrimage routes like the Camino in northern Spain are broken down into sections and only a small % walk the route in its entirety. Product development would be required although there are established operators e.g. Walk awhile, who will arrange accommodation and luggage transfer. This may also be an opportunity to work with the AirBnB network especially if visitors are looking for a more local experience.	This is a popular product choice for Dutch and German visitors as well as older active retired UK short breakers who often travel in the off peak season.
Evolving Travel Needs – *The desire to live like a local...*				
The Trend	**What it means**	**Opportunities for Canterbury**	**Challenges for Canterbury**	
Pursuit of real **Tourists no longer want to be tourists... they want to live like a local and have all the insider knowledge**	A destination needs to be genuine and authentic' and show potential visitor how they can immerse themselves and 'go local'. The visitor is looking for something different: an experience that they can mould into something unique – Finding a quiet coffee shop where the locals go; finding a secret garden/ green space in the centre of the city/ discovering the detail of the architecture by taking a less well trodden trail. This desire to blend into the destination and not be a 'tourist' has been one of the driving factors behind the success of AirBnB.	Canterbury has a strong mix of independent businesses and well as recognised chain;, match this with a medieval street layout and you have a great product to appeal to the 'non-tourist tourist', 'Seek out the local secret hot spots'. In addition to the current hotel offer, the AirBnB accommodation in and around the city centre has grown considerably over the past 2 years enabling more visitors to stay with local residents. Although Air BnB now has broad appeal.. it is particularly popular with the 25-45 age segment, who are currently lacking from the Canterbury visitor profile... they take more short breaks and spend more in destination than a hotel guest. **2014 Airbnb research*	Like many city destinations in the UK – web profile of product is often reliant on membership– resulting in some of the engaging product being missed. DMO web content needs to reflect what the consumer is looking for.... it needs to showcase the best product to engage the visitor at planning stage, to not only choose the city but entice them to stay longer – The listing of 'Things to do' needs to be broadened into 'experiences you can have'.	This is evident across all segments/ markets, however it is more prevalent in the 25-55 age group from the UK and near Europe. France has the greatest desire to seek out authentic experience and is the highest European market for UK AirBnB booking (*The Airbnb growth in the Capital is thought to be fuelling the French markets reengagement with London.)*

Leisure Upgrade **The desire to add an educational element to a destination visit.**	The leisure upgrade is all about getting more out of your visit... "I didn't just see that, I did this". Visitors are looking to engage further with the destination by getting involved in an activity that is both fun and educational...– a destination visit increasingly needs to be relaxing, rewarding, engaging and value for money. experience based short breaks in the UK continues to grow via platforms such as Groupon, Trip Advisor and now AirBnb. Visitors are looking to combine their city break with a gin distilling course; trying their hand at chocolate making, or even joining in the harvest at local vineyards.	Linking to the Universities - Canterbury as a heritage city with 2 established universities already offers a range of short courses. There could be an opportunity to link this educational offer with the short break package. The quality of the Food & Drink offer is also a key factor; visitors want to eat and drink local produce and they want to know the back story... and they want to talk about it on social media . (*Food and Drink are one of the most popular travel Instagram posts world-wide).*	The challenge is to raise the profile of what is already on offer from the Universities, workshops and lectures via the Gulbenkian and Marlowe as well as the potential for behind the scenes and hands on workshops via the local businesses. Images used on the website need to work harder, to not only list the restaurants, but to showcase the food, why eat there... The visitor wants to know the the story behind the food they are eating... it is a traditional dish, is the produce local... is the chef local? (This approach is increasingly being adopted by major food retailers such as Waitrose to build the customer/ food relationship and encourage loyalty). At present the visitcanterbury.com website rarely shows the food or clientele in any of the images used to promote local restaurants.	
Customised reality	Virtual & Augmented Reality(VR & AR) will continue to grow, and is increasingly being use by heritage cities to bring the many layers of history to life. English Heritage/ Historic Scotland has notably grasped this technology to bring to life battlefield sites and ruins.	The use of VR could benefit the linking of the UNESCO World heritage site key locations (The Cathedral/ St. Augustine's Abbey and St. Martins Church).	Canterbury UNESCO site currently ranks 9 out of 9 for WHS in the South of England. Spread over 3 locations, although linked by the Queen Birtha walk, the connectivity of the sites is often missed by the visitor.	This type of technology use is particularly popular with the Asian/ Chinese group market.

Case Study: BATH – Group Travel

Who are the Customers and what do they want.....

Bath recognises the importance of developing its international day trip group market, where the experience is built around 2-3 core visitor attractions and the promotion of the retail offer.

By providing targeted group information, Bath not only looks to encourage more group business, but the *desired* group business:

a. Food and Drink is highlighted as key experience for the group market encouraging extension of stay to use the cities restaurants for lunch and evening meal venues.
b. Key events are trailed all year round i.e. the Christmas Market remains on the group organisers as well as the visitors' radar so encouraging repeat visits.
c. Product highlighted on the groups page uses imagery to reinforce the day to night experience (open top buses and shopping – early evening drinks and a show)
d. Tailored itineraries around special interest (e.g. film locations, shopping, and get active); time constraints (e.g. only 4 hours)...
e. All copy leads with experiential text rather than list headings – 'Indulge in Bath's fabulous Restaurants and Bars' (Where to eat) 'fall in love with Bath' (Explore the city map).
f. Coach park information is listed in detail, cross referencing content with the local authority site to book.
g. Heavy emphasis on the quality and diversity of the retail offer to appeal to the Asian outbound group market from London (China/ S. Korea).
h. Hen parties are portrayed as luxury pampering weekends.