Experience Options Analysis:
Mapping the experiential product for the North Downs Way and Kent Downs AONB

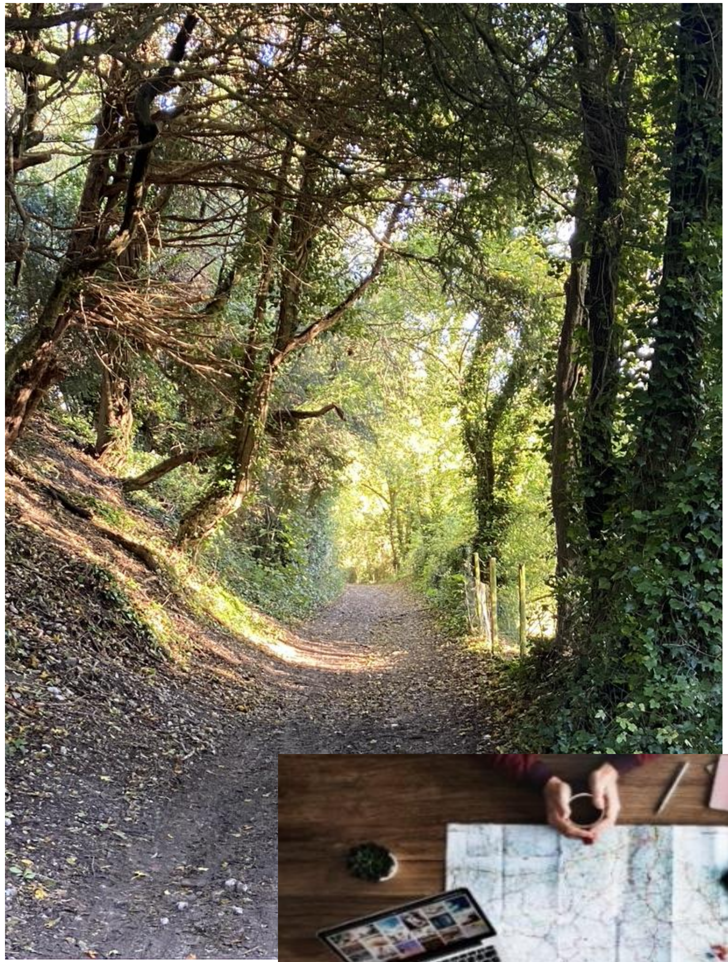
September 2020

Interreg France (Channel Manche) England
EXPERIENCE

EUROPEAN UNION
European Regional Development Fund

Kent Downs
Area of Outstanding Natural Beauty

Contents



Mapping the experiential product in Kent

Context

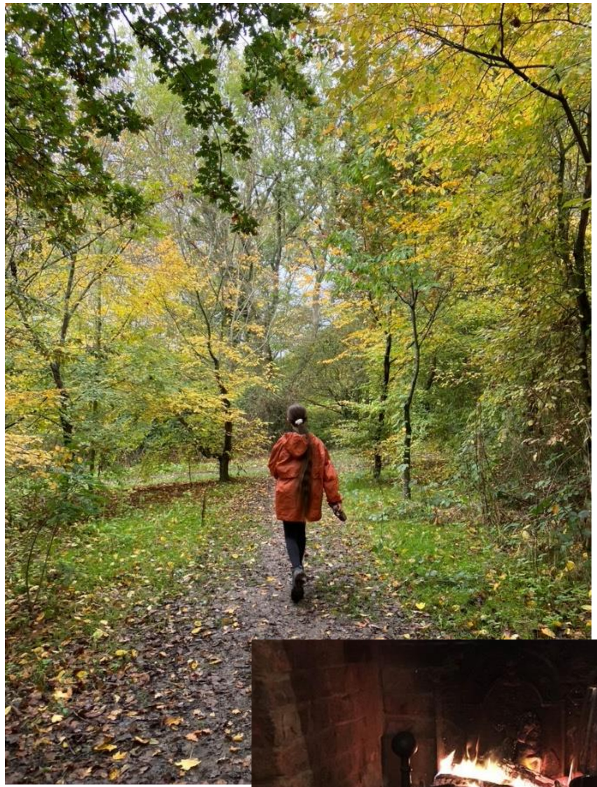
We know from numerous national recreational surveys, that walking is the joint most popular activity (alongside eating out) for people taking a daytrip in England. It's the most popular outdoor activity; an important mode of transport and improves health and wellbeing. Yet getting out into the countryside is in decline, even though leisure walking fuelled by the desire to improve physical and mental health has increased.
Consumers want to reconnect with the natural environment, but how we do this has changed in the last 10 years. Visits to green spaces have become closer to home for shorter periods and engagement has been more with urban green spaces rather than the countryside. Does this mean that walking in the countryside is less desirable?

On the contrary, urban parks may be easy, accessible and convenient yet, according to *Natural England 2019 - Monitoring of Engagement with the Natural Environment* study, the urban experience scored low on positive outcome (the way it made people feel). The product that scored high on emotional outcomes were; mountains/ hills, woodland / forests and farmland. Therefore, the data indicates that the consumer has a high desire to engage with the natural and agricultural landscape but perceives it to be difficult.

Equally, the increased interest in cycling during lockdown has been one of the few silver linings from the Covid 19 pandemic. There has been a UK increase of 100% on weekdays and 200% at weekends. As a result, the Government has recognised this as an opportunity to get the nation using cleaner, greener forms of transport, changing the way we travel.

Walking and cycling are just the tip of the countryside experience iceberg and there is a notable shift change in the way consumers want to interact with a destination. Combine this with the increased desire to engage with the countryside following lockdown and this is the perfect time for the National Trail and KDAONB to review the visitor experience, to support the rural economy.

The Following options analysis will explore the current travel and leisure trends and review what this means for the North Downs Way and Kent Downs AONB, assessing the strengths, opportunities and gaps to engage with a wider audience to travel out of season. It will look at who are the best prospect visitors and best practice examples of experience products to meet their needs.



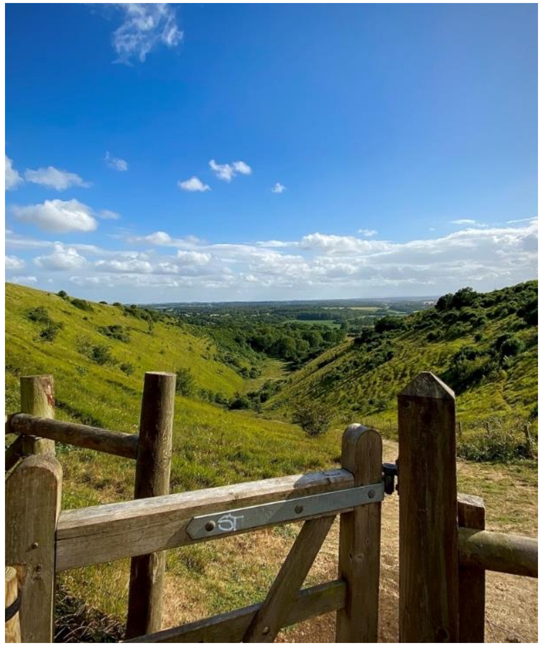
Section 1: Experience Travel Trends

Trends & Insights:

Engaging with the countryside – In 2016 questions were added to the International Passengers Survey to gain a greater understanding as to how inbound visitors engaged with the British countryside. Top line data ranked the South East of England 5th for visitor choice for outdoor leisure pursuits, behind Wales, Scotland, South West, Yorkshire and joint with East Midlands. The second component to the countryside question focused on ‘experiencing rural life’, where the South East performed more favourably with higher spend.
The interest in rural life is the key to unlocking the potential for developing new experiences. Visitors regardless of whether it’s a domestic or international audience want an authentic and genuine experience, that they can’t get at home. What may seem ‘everyday’ to the rural community, could be of huge interest to a potential visitor.

Modern Day Pilgrimage & Transformative travel
Pilgrimage has traditionally been thought of as a physical journey, an embodied act that involves the climb up a mountain, travel to a tomb or visit to a location of a miraculous event; but today, the idea of pilgrimage goes beyond just the spiritual. Insights from the travel trade specialising in guided and self-guided routes along El Camino in Northern Spain, state there are 5 reasons why visitors walk the route; Spiritual – visiting the tomb of St. James, Self Awareness & health, getting away from life’s routine(tech disconnect) on an adventure, culture & heritage, meeting people. For many, these ancient routes have become more about self-discovery and life goals than religious achievement, though the concept of pilgrimage as part of the route’s heritage still has a strong role to play, offering a sense of authenticity and seal of approval to the experience. The new buzz word is transformative travel, a trip that leaves you ‘transformed’ following an experience. Visitors are now looking for travel experiences where they can learn and grow as individuals; they are still looking to create memorable moments but want these activities to leave them ‘positively’ changed, could this be the new pilgrimage?

Local and Authentic – This is the winning component with any experience-based product and is at the very core of Airbnb’s platform; connecting people with locals to share their homes and their passion for a place via an organised experience. A closer analysis of the DEF research interviews with overseas nationals flags an important insight; when viewing the countryside, international travellers were impressed by stunning views… but highlighted that they could get stunning views at home; some felt unimpressed/ found it hard to believe England’s claims of mountains and forests (USA and Germany).
What they didn’t have at home were the people. People who they would meet in a pub, go on a walking tour with, who were passionate about where they lived and the layers of history and stories they were eager to tell – reconfirming that it’s the local experience with the locals that makes all the difference.



Multigenerational Travel; Smaller group travel and bubble bookings– Spending quality time together with friends and loved ones has always been a driver for experiential travel. Yet due to the current repercussions of Covid 19, we are looking to reconnect with key members of our family and friends even more; this has given rise to the ‘bubble booking’ trend – family and friendship groups coming together across 2-3 households to travel together. This could offer a great opportunity around VFR motivated travel. (Visiting Friends & Relatives).

Under Tourism – Covid 19 has accelerated the nations desire to get away from the crowds. Like all national trails, the North Downs Way has its’ honey pot areas, which normally constitutes a stunning/ instagramable view within close proximity to a car park. Away from these pinch points, there is certainly the opportunity to develop areas that are currently experiencing under tourism. For example, areas such as Trosley Country Park or White Horse Woods could combine the trail with foraging or hidden heritage tours, to broaden the appeal of quieter areas.

Experience Travel Trends

ECO Tourism and the 'Greta Thunberg' Effect – Travellers are becoming increasingly aware of their impact on the planet; although this hasn't dampened the desire to travel, it has raised questions as to 'how' we travel. As one on the better rail connected National Trails, the North Downs Way benefits from over 30 linkable stations along the entire route.
Although a majority of users will still arrive by car, recent Trip Advisor research noted an increase in the number of enquires relating to integrated train travel. Also bookings.com insights highlight that 76% of Gen Z's are looking to use more environmentally friendly transport once they reach their destination.

Tech is the National Trails best friend – Tech is now integral to the planning and real time delivery of our leisure time, none more so for the next generation who are looking to experience the KDAONB/ NDW. Apps such as OS maps, guide the user in real time on the path but also enable pre planning of routes and links to the rail network. 'What 3 words' instantly locates the user even in the most remote locations, offering additional reassurance and safety, while Glimpse can track individual group members and estimate arrival times. All of this offers additional reassurance to new users who may not feel confident in the countryside environment. Specifically for Kent, there is the Kent Connect App.

Culinary travel – Whether city or countryside based, culinary experiences are consistently the most popular experience on the Airbnb platform. When in the countryside, food & drink can expand to include foraging, outside dining and experiencing food at source on the farm or with the producer.
This all offers another layer to the KDAONB / NDW proposition… you can not only walk and cycle on it, but you can learn about its amazing larder and wild cook on site – key areas such as Kings Wood would work well for such activity. Capitalising on the number of vineyards directly en-route is another USP – Kits Coty, Westwell, Chatham, Terllinghams etc..

Wellbeing and Recharging– The countryside not only provides the idyllic backdrop within which to go for a walk, but helps visitors disconnect with stress and anxiety and connect with nature. Wellbeing experiences are no longer relegated to spa therapy and flotation tanks, now they are linked to almost anything from food to getting creative and learning a new skill. Most importantly, the end result leaves the visitor comfortable, healthy, happy and recharged. Increasingly walking trails globally are changing their emphasis from talking about 'miles travelled' and focusing more on the wellness benefits. Pop up experiences like woodland bathing, forest yoga and walking the route with a four legged comapion are also increasingly popular.

The value of social & business networks –On average Word of Mouth can influence approximately 25 people into action and has been the bedrock success for platforms such as Tripadvisor. Harnessing the reach of social media and engaging customers at every stage in their journey is crucial. Good experiences create a loyal following, where often the attendees will repeat book and tell their friends, therefore management and brand delivery/ consistence via these channels in crucial.
The Business network is equally an untapped resource for the NDW, every accommodation provider/ Airbnb host could be a trail ambassador or an KDAONB countryside concierge. All offer a ready-made promotional network to raise the profile of new experiences on and around the trail direct to the consumer.

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

Experience Travel Trends - Recap

Trends Recap:

Engaging with the countryside – Desire to engage is high, though actual engagement is in decline as in recent years consumers have opted for urban parks. Barriers such as safety concerns need to be removed, prioritising reassurance and benefits to wellbeing.

Modern day Pilgrimage – Is pilgrimage more of a personal rather than spiritual journey.

Local Talent – Value the appeal of the local community to the visitors; the pubs and local events – visitors want to feel like a local.

Travelling together – Experiences bring us closer together by creating shared memories, Covid 19 has made us want to reconnect

Under Tourism – The consumer wants space and to discover something new

Eco Tourism – Rail connectivity is part of the appeal to Gen Z as well as sustainable food sourcing

Tech & Safety – Technology can be used to reassure as well as inform and guide in the current climate

Food & Drink – A fundamental part of the experience not just a necessity

Wellbeing – A new purpose for the National Trail

The Value of Network – The consumer on social media are your influencers and the local businesses around the trail & KDAONB are your ambassadors.

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

Section 2: Understanding the product

What are the leading booking platforms telling us?

Airbnb: The platform is synonymous with the 'local and authentic' offer, growing exponentially over the last 10 years.

- **Accommodation:** There are now in excess of 223,000 hosts across the UK welcoming guests, with an average length of stay at 3.1 nights.
- **Experience:** As of July 2020, there are nearly 1400 bookable UK experiences. Kent currently has 33 experiences on the platform, 2 within the AONB (The Kent product accounts for 2% of the total UK offer) which indicates that the county has room to grow.

Airbnb Accommodation

Guests choose Airbnb for:

- **Value for money** – In most destinations the offer is room rental to full house booking
- **Local insight** – they want to feel instantly like a local, the quickest way to do this is to know one.
- **Neighbourhood experience/** knowledge – whether it's a village location or London zone 3, the guest is looking for instant immersion into the local community.

Airbnb Guests are valuable to the local community:

- **High average spend** – Average spend per day in the UK is £100 per head
- **High local economic return** – 43% is spent in the neighborhood in which they are staying
- 2/3rds stay outside of tourism hot spots
- A greener way to stay - **environmental impact** is lower than the average hotel stay.

Why is it so popular?

The Flip side: For a destination, the popularity of Airbnb can be a double-edged sword. Currently so many home rentals are not required to comply to the same regulations as standard B&B's or hotels and large group bookings, (pre covid) have been known to cause disruption in city-based communities. However, the recently added category of 'Airbnb plus' offers additional reassurance to both the guest and community.

For the National Trails and rural areas, home stay rentals can fulfil the gap for affordable accommodation, so making the long-distance walking trip more accessible in the UK.

Tripadvisor: As the world's largest travel platform, it is now second nature for travellers to cross check its databank of reviews before making a purchase; no one knows more about what consumers think of a destination. Each year tripadvisor tracks and forecasts new trends:

- In 2019, TripAdvisor highlighted that the hottest new souvenir to take back from a trip was a new skill, noting that visitors were continually looking to customise their own trips so they can immerse themselves into the local culture. Health and wellbeing showed a significant increase and the importance of feeling a connection through personal interest.
- Predictions for 2020 indicate the appeal of food and drink experiences is only set to increase … but it's the uniqueness of the possible experience that will influence the decision to travel, reinforcing the desire to get off the beaten track even more.

Source: *Visitbritain media centre Feb 2019 release; Airbnb Experience report 2019 trends; 2020 Airbnb platform analysis, Airbnb UK Insights report 2018.*Tripadvisor product review; 2020 Traveller trends: 4 areas shaping the future of travel experiences; Airbnb Insights report 2018.

Outdoor Activity insights that resonate with the NDW/ KDAONB offer

The Appeal of the Kent countryside resonates with both the domestic and international traveller, however it's probably worth noting that the breadth of awareness of the variety of landscape on offer, is lower than maybe first thought.
Extensive research conducted in 2018 as part of the Discover England Fund project indicated that for the Overseas visitor the outdoor countryside product is relatively unknown and for the domestic audience, although there was a slightly higher awareness of UK locations, the detail was hazy. The research was conducted across UK, US and near European markets.

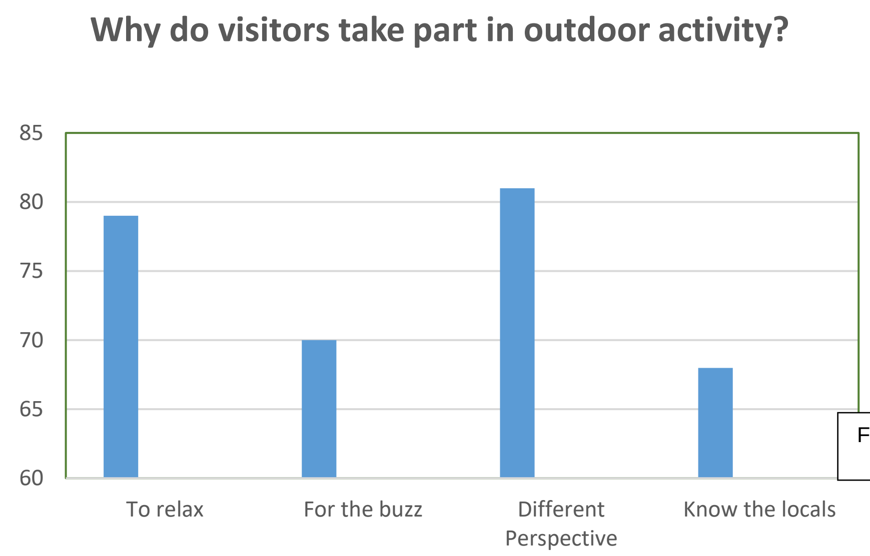


Fig 1.1

This data (fig 1.1) shows how outdoor activity is so closely linked with wellbeing (relaxation and reflection) and that there is an opportunity to integrate it as part of an experience offer. Getting to know the locals is another key insight, which is a driver for experiential travel.

The Data in Fig 1.2 highlights the top 3 outdoor activities undertaken while on holiday in England, which has direct relevance to the North Downs Way; of the 95% who state they would take a gentle walk, 80% are already doing this level of activity on a regular basis.
Therefore, the key take-out here is not that you have to engage this group to walk, but more why they should choose the NDW over other trails and rural areas.

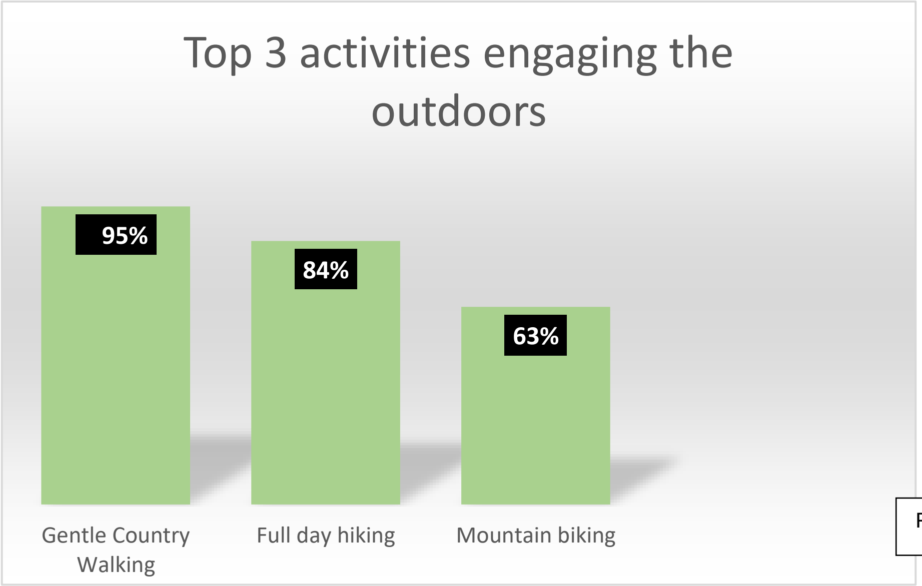


Fig 1.2

Establishing the key points of differentiation and focusing on additional triggers such as experiencing a different perspective and the opportunity to get to know the local, would strengthen product development.

Outdoor Activity insights that resonate with the NDW/ KDAONB offer

Outdoor activity insights taken from the Discover England research report:

The research shows that more people over the age of 45 engage with the walking and cycling product (esp. walking).
Activities such as surfing, horse riding and kayaking, are chosen by the under 35's who generally book these activities in advance.

Take out: At present walking is not seen as a bookable product and for the majority, it is very much 'part of' rather than 'main reason' for the travel decision. The 45-65 age range are the most engaged with gentle walking to full day hikes, from the data in fig 1.3 it is notable that they are less swayed by outdoor activity in choosing the destination, therefore it is important to understand the value of additional trigger points for their destination selection. E.g. Food & drink, Heritage

Fig 1.3

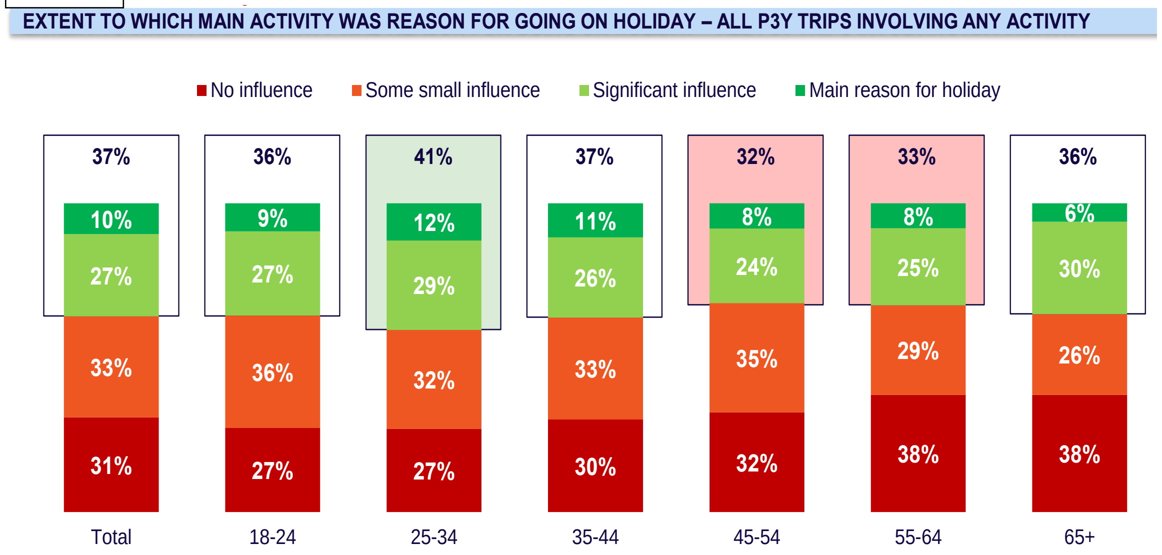
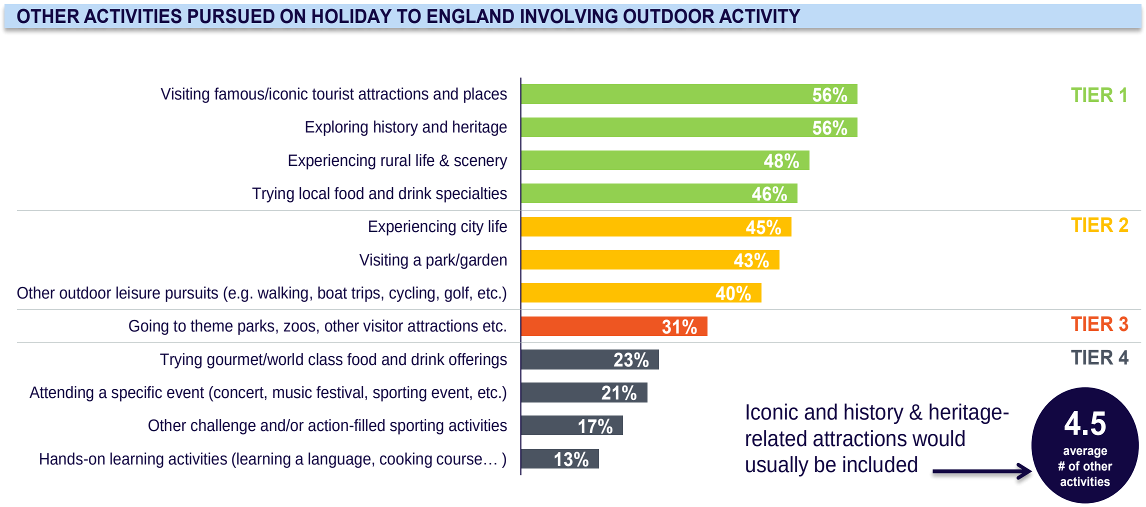


Fig 1.4



Other activities that include outdoor activity:
The data in fig 1.4 focuses on the key products that are:

- Associated with outdoor activity
- Are the favoured products from an already receptive audience for outdoor activity

Take out:
All products highlighted in Tier 1 can be easily matched along the NDW and used to bolster the trails appeal to a casual walking audience.
Given the age engagement with walking and cycling skewed towards the 35-65 yr range, it is also worth noting that walking and cycling engagement may include multiple family members/ abilities.

Source: Fig 1.1-1.4 Discover England Research – Outdoor activity report 2018

How does the walking offer need to change to appeal to a wider audience

Outdoor activity – Both international and domestic tourism research highlights the appeal of the countryside in attracting visitors. Areas of the UK such as Cornwall, Wales and Scotland position themselves for both tier 1 activities (fig 1.4 p9) such as walking and cycling as well tier 2/3 such as surfing and rock climbing, this broadens the destination appeal to a wider /younger audience. Although the Kent countryside and coast may not be able to match this variety, what it can offer, is accessibility and additional product overlay. E.g. food & Drink

For example: **How weaving in additional product can help?**

1.Walking

The NDW section from Charing to Wye encompasses stunning views, woodland, agricultural and downland landscape as well as linking end to end to the rail network
This is a stunning 2.5 hour walk … but it only hooks the visitors' attention if they are considering going for a walk.

What makes a good walk?

a.) Landscape/ views/ architectural vistas

b.) points of interest along the way

c.) A chance to relax, unwind and recharge

2.Walking plus

When focusing on the experience rather than the distance of the route, the information takes on a new life I.e. Charing to Wye becomes a section where you can walk in the footsteps of medieval pilgrims ,sample the local wine (Westwell Vineyard) and discover the tomb of Richard Plantagenet (Eastwell Church Ruin) all on a 2.5 hour walk along the NDW National Trail. Whether this approach is to encourage self-guided or guide-led activity, overlying additional product that is known to be of interest to a potential outdoor activity audience, will create a point of difference with other Parks and AONBs.
For time conscious short breakers, allocating 3 or more days just to walking 'the route' might not be a luxury they have; equally, they may be a family group who needs to cater for different ages.

The opportunity offered around a walking/ cycling 'plus' proposition is to show how a ½ day walking experience is a must-do part of their staycation.

What makes a good walking experience?

a.) Landscape/ views/ architectural vistas - with a back story

b.) bringing the heritage alive through storytelling, stopping off at local producers/ vineyards – lunch at a pub, cake at a tearoom.

c.) A chance to relax, unwind and recharge – meeting local people

How does the walking/ outdoor offer need to change to appeal to a wider audience

In order to grow visitor engagement with the NDW and KDAONB offer, the product may have to be delivered in different formats.

The Long distance hiker/ cyclist, will no doubt already be familiar with the trail and they will have already either walked it in full or in part, or will have walked other Long distance routes across the UK. The barrier here isn't to convince them to walk the trail, more why they should choose your trail over other options. They can be reached via targeted media and blogs and will no doubt take information from the National trails website/ guide books/ maps. *Even though you will find long distance walkers in most of the consumer segments, this is a small , almost self sufficient group.*
The Casual walker may however need convincing further by using the appeal of different product such as food & drink experiences, ease of access, breaking the route down into manageable/ interesting sections… and they will need additional reassurance on safety/ ease etc…. And how this route is great for their groups abilities.

Fig 1.6

Experience products: E.g. Food & Drink – Hidden Heritage – Literary – Vineyards – Agri tours – Pilgrimage - Wellness

Range of additional product required to activate the user

Casual/ leisure walker
More additional product triggers needed

Local
Day visitor
Leisure walker/ group tour
Families
outdoor activity is not the main reason for travel
Local/ Domestic/ group international

Product; 1-2 hours walking combined with other attractions - often circular routes to car park with other products

Barriers: Concern about getting lost, accessing the countryside, weather

Casual / moderate walker / cyclist with limited time

1-2 day options combined with other product
Repeat visitor
Walking/ cycling as 'part of' not main reason
Domestic 1-2 hour journey time/ rural retreaters/ active

Product:1/2 day - 2 days - regular walkers, time poor -mid -higher range accommodation/ Unique Airbnb/ looking to combine other experiences

Barriers: Time, need to relax, competition from other activities, weather

Long distance walker/ hiker/cyclist
Less product triggers required

Solo traveller/ couples/groups
Hikers / mountain biker/ route cyclist
Trail collectors
Domestic & International
Product - self guided/ looking for planning and local knowledge assistance to assist own planning - camping, Airbnb ,B&B
Barriers: appeal of other trails, baggage carrying service/ lack of

Engaging with the North Downs Way/ AONB Walking / Cycling

Product Options Analysis for NDW – Core Strengths

The North Downs Way may have been officially launched as a National Trail in the 70's, but historically this has been a walking route for 1000 's of years. Walkers today are following in the footsteps of pilgrims that have been making the journey to Canterbury and Rome since the 12th century. Before that, due to the topography of the Downs, it has been a bronze age byway Kris-crossed by roman roads and the surrounding AONB is still home to forgotten burial chambers and roman villas.
It is this depth of history along with the accessibility of the route via the train network that makes the NDW the perfect route to build a wider experience proposition.

The Sevenoaks to North Kent section holds a wide range of heritage that is often overlooked by the casual walking visitor. Excluding the hotspots such as Darenth Valley, the areas of the route that travels through Gravesham district close to historic villages such as Cobham and areas passing the Medway megaliths, all offer a great opportunity to tell the historical story of the route.

West to East Kent aligns closely with the Pilgrims Way passing centuries of heritage and focal points such as hillside carvings and the ruins of an archbishops' palace. An element that significantly stands out for this section is connectivity to the SE rail network alongside a string of villages that have welcomed walking travellers for years. Food & drink, walking food safaris and foraging, all offer the opportunity to develop a 'dip in and dip out' approach to engaging with the Kent Downs alongside walking sections of the trail. The profile / engagement with modern pilgrimage is clearly underplayed at the moment.

East Kent -. As this section links Canterbury/ Dover and Folkestone together, there is not only opportunities to incorporate experiences among walking and cycling on the route but also key 'milestone point' experiences. For example; a weekend itinerary programme that includes a seafood cooking lesson in Folkestone, or the chance to join an archaeological dig in Canterbury or Dover.

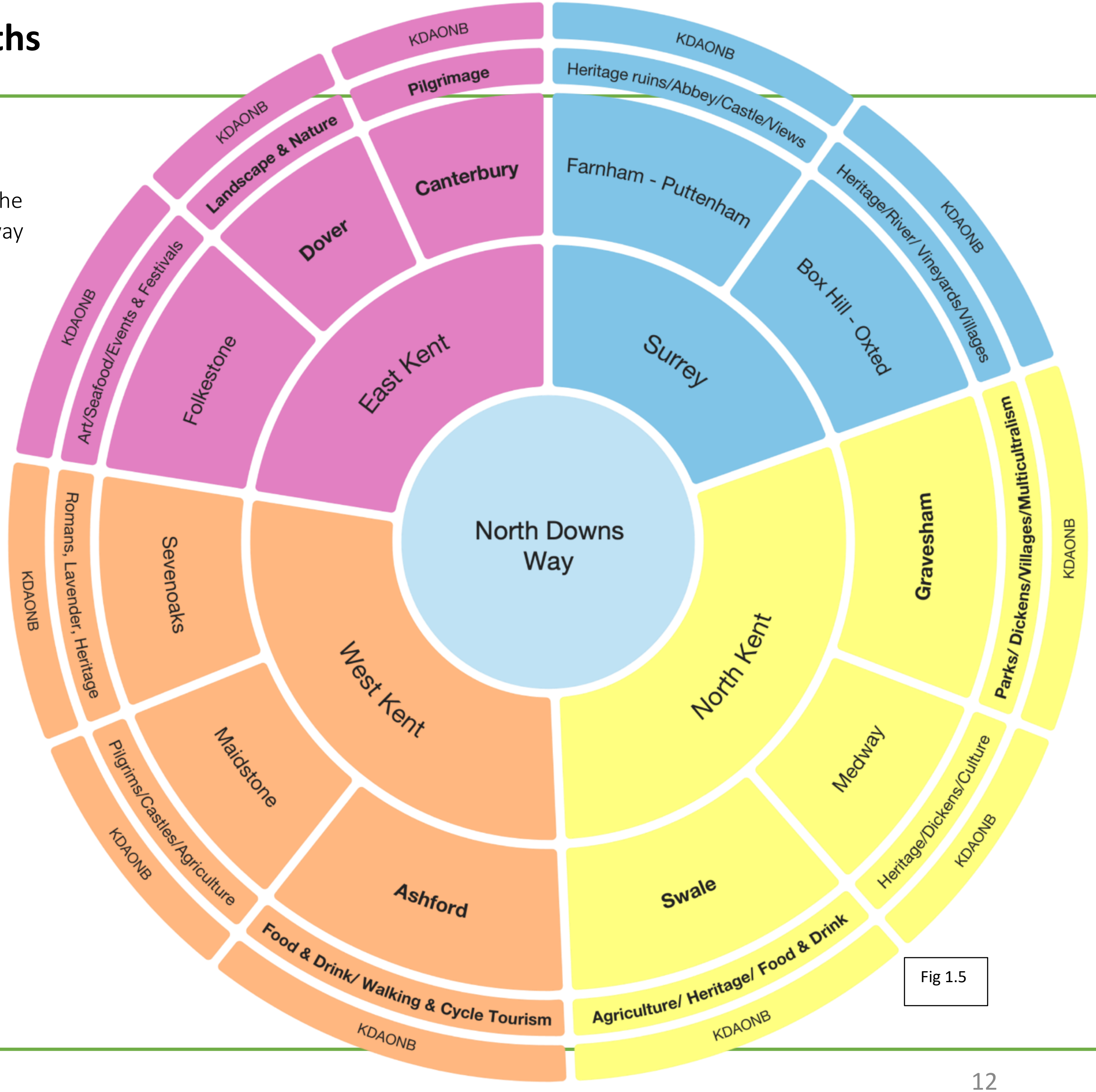


Fig 1.5

Core product offer North Downs Way National Trail/ Kent Downs AONB

Walking tourism – As highlighted in the research above, there is a considerable level of interest in walking in the countryside from both International as well as domestic visitors. Some will need more assistance than others when planning and accessing routes like the North Downs Way, which can be met by the delivery of both self-guided and guided walk itineraries. Traditionally, National trails are broken down into linear sections for the moderate to serious walker, where most sections are a minimum of 6-8 miles, but normally 10 miles plus. This can act as a barrier to the first time trail walker; distance, navigation, access to route from public transport, proximity to farm animals and how at ease the visitors feel in the countryside are all barriers.

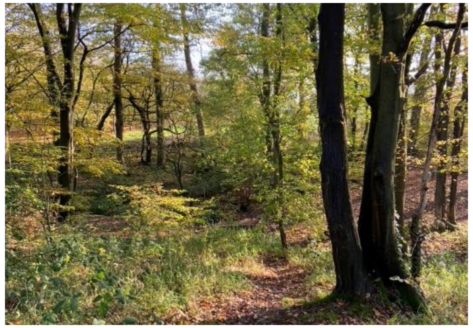
A guided walks programme via bookable product or via events such as walking festivals can break down these barriers. The Landscape report found that BAME groups are disconnected from green spaces and recent research from Natural England revealed that only 1% of National Parks visitors came from a BAME background. There are however grass route community groups that aim to tackle this issue head on, @blackgirlshike established in 2019 organises walks and meet ups for black women to explore the countryside with like-minded individuals and could be a great community group partnership going forward.

Cycle tourism - At the beginning of 2020, bike sales were down by 8%, however following lockdown, sales rose by 60% (to June 2020) with a specific focus on affordable bikes and a rise in electric bikes, as consumers sought out alternative travel away from public transport. This increase, driven by a desire to have a green/ isolated form of transport has created new potential users for the NDW, who may not have considered cycling on a national trail as a leisure activity before lockdown.

There is an opportunity to reach out to the new cyclists, especially now with schemes supported by cycling UK like 'big bike revival'. Partnership with SouthEastern could equally explore the potential to use the network during off peak and weekend periods to encourage trail use. Depending on level of user confidence, this could be encouraged by self-guided as well as group led product development.

For the more established trail cyclist, there are access issues on some parts of the trail, especially around Sevenoaks. This could affect final destination choice, especially as the South Downs offers a more continuous route. Development of alternative link routes or changes to ROW access on areas such as Eastwell will make a significant difference and will increase the routes appeal to international users as well as domestic.

Wellbeing- Wellbeing has moved from niche to mainstream. Increasingly the visitor seeks holidays with reduced digital interruptions so they can recharge and feel positively changed; also when applied to a family audience, this is reflected in parental concern to separate their child from the x-box or i-phone. Improving personal wellbeing has always been a positive outcome from engaging with the countryside through outdoor activity. Now, especially given the impact of Covid -19 on our lives, the appeal of an activity that will offer a safer environment to engage, reconnect with the natural environment and improve wellness both physically and mentally, is of increased interest.
As a result, several destinations that focus on their rural product have dialled up the underlying benefit of wellbeing, to resonate with potential visitors who may need an additional 'carrot' to get them engaged.



Extending the core product offer for North Downs Way National Trail/ Kent Downs AONB

The desire to engage with the farming landscape - Current research shows that domestically we are keener than ever to rekindle our connection to the countryside. Great examples are: lambing, more and more organic farms are bringing the lambing calendar forward, so the season now runs from December to April; pruning and training hops, apples and vines, all need to be pruned and trained between January to early March and although the weather can be an issue, bright sunny cold days in the vineyard followed by a hearty lunch offers the perfect experience.

Being Green - Sustainable travel/ Eco Tourism isn't just for coral reef monitoring and reforestation programmes, the way we choose to travel, the type of accommodation we book, the methods of transportation we choose all have an impact. Although this may not be a lead trigger for all segments, it is an incredibly powerful addition to the destination proposition, which could be the final step to take the visitor from considering to booking. More notably is the importance of sustainable transport for the Gen Z segment.

Food & Drink:

The seasonal, traceable, sustainable food movement - Increasingly the consumer is asking more questions about sourcing; where does their food come from? How was it grown and how far has it travelled to get to their plate? This trend is reflected on what leading supermarkets stock on their shelves e.g. Tesco's Local produce section and the popularity of independent restaurants and hotels from Mark Hix in Selfridges to the Pig hotel nr Canterbury. With so many growers and producers and the seasonal 'Open Farm Sunday' schemes; there could be the opportunity to link walking a section of the trail with a farm visit experience.

Wine & Walking - The growth of vineyards in the South-East of England is increasing exponentially; there are 168 wineries and 658 vineyards in England, out of the 3759 hectares on the vine, 2720 are in the South-East. With the new Domain Evermond vineyard at Chilham the NDW could be the no.1 national trail for Vineyards e.g. Denbies, Godstone, Squerryes, Kits Coty, Westwell, Chartham, Chilham, Elham Valley & Terlingham. This offers a great opportunity to build a vineyard product using the NDW as part of the experience-e.g. Guests from Eastwell Manor can walk the North Downs Way direct from the hotel to Westwell vineyards, equally visitors to Canterbury can follow the NDW to Chartham and then link to the vineyard visit.

Hidden Heritage - heritage is a UK wide strength and visiting heritage locations is consistently the number 1 reason why international visitors choose Britain.
The Heritage offer for the inbound market is however heavily dominated by London and the larger castles, cathedrals and stately homes. The huge plus point for the NDW is not only does the routes run through/ near several of Kent's big name heritage sites, but it also links a succession of heritage gems ranging from medieval villages and privately owned castles to an abundance of historical churches, not to mention the heritage of the natural landscape.
As highlighted, the trends around under tourism and the visitors desire to go off the beaten track, offers a huge opportunity for the NDW. Hidden heritage sites can offer an almost inexhaustible content list for social media to bring alive the added benefits of a walk along the trail, this especially appeals to the casual walker.

A new approach to pilgrimage – 'A trail that leaves you positively changed'.
Developing a wellbeing product that takes its foundations from pilgrimage, is a great way to develop a short break travel offer. We know from research on the Camino walkers that a large % have not walked a long-distance trail before, however they have a desire to pitch themselves against a task to de-stress and recharge, with the objective to complete a personal journey. The Interreg experience project could offer the opportunity to product test the way the route is pitched to the user e.g. Pilgrimage or personal journey. *For further insight into the Pilgrimage product see 2020 NDW/ NDAONB Pilgrimage fact sheet.*

Experience Product Opportunity & Gaps grid

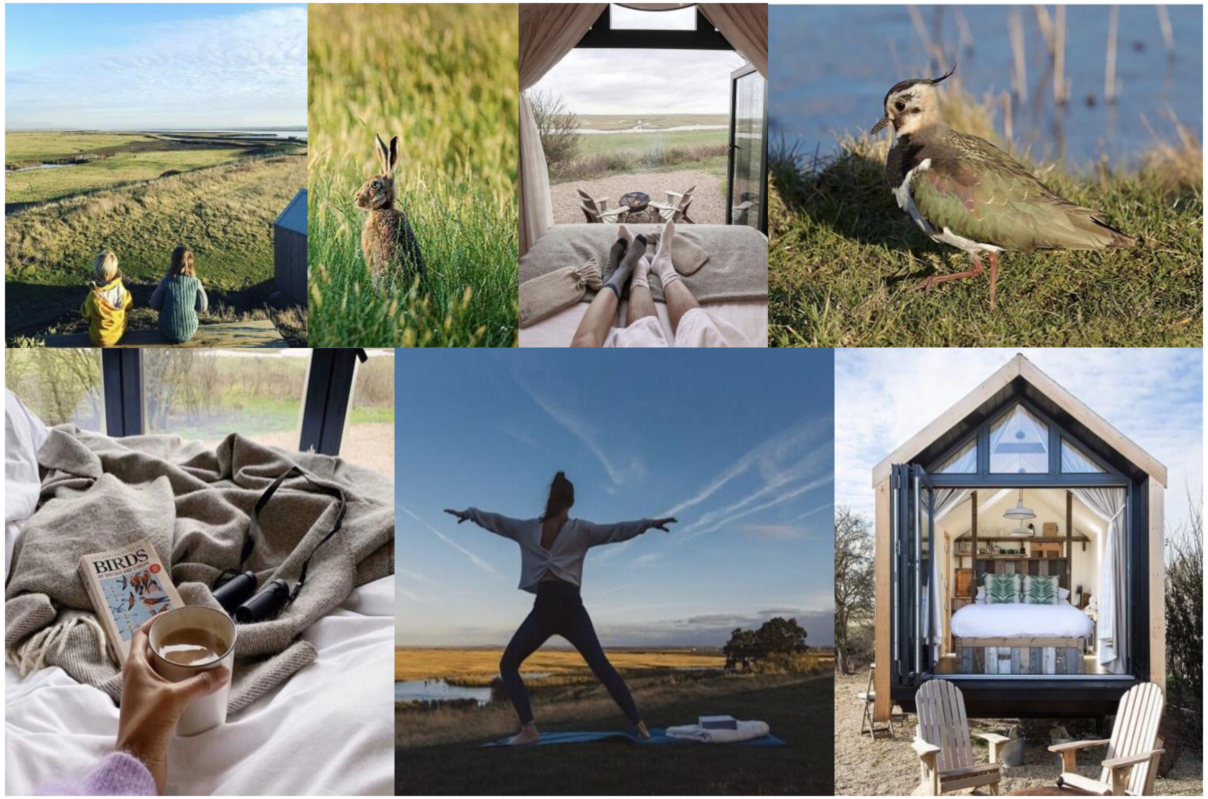
Product Opportunity	Experience	Opportunity	Gap
Established Product	Self-Guided Walking Holidays Self-Guided Cycling Holidays Vineyard Tours City based walking tours in Canterbury Village heritage walks (Volunteer run) Self-guided walking itineraries Hidden Heritage	With many established products the opportunity is around extension. -Working with operators to feature new sections, to ease honeypot locations. -Encouraging city & village-based tours to incorporate and reference the NDW -Targeting self-guided walk itineraries to the consumer segment i.e. families. Or offering seasonal alternatives guides for the same walk showcasing the reason to visit throughout the year.	Highlighting the additional layers of the NDW experience. On the group product development e.g. NDW cycle route.
Hidden Gem	White Cliffs ranger events Access to hidden heritage – e.g. Chilham Castle	Developing current events into bookable product to appeal to a wider audience. Greater inclusion of smaller heritage sites.	Utilising social media to raise the profile of established product.
Niche	Forest Bathing Forest Yoga Archaeology Forestry with Heavy Horses Farm access event Walking with… (Alpacas, dogs, micro pigs)	These are great activities to reconfirm the NDW/ KDAONB as a wellbeing backdrop, these products appeal to niche groups and offer fantastic PR opportunities to tell the story of the trail.	Some products exist, others need to be approached to relocate the offer to the NDW/ KDAONB. E.g. key dates for heavy horse forestry.
New Development Opportunities	Guided Cycling excursions with Bike Hire Guided walking tours/ mini walking festivals Bookable historical walking tours Walking tours for niche audience groups	-Reaching out to the new user – when encouraging new user groups, it is easier to weave a wider rural economy message into the pitch. i.e. working closely with SME's/ volunteers who would deliver these experiences. -Highlighting where on the route visitors can buy local produce, walking access points to visit vineyards. Working with Community groups to access niche audiences	There are product gaps, such as bike hire and guided routes on the NDW Accommodation- working with rural accommodation providers/ shared economy to deliver a complete offer

Example Case study – The appeal of Nature and Wellbeing

Case Study: Elmley Nature Reserve

Elmley is the UK’s only independently owned nature reserve. It offers 3,300 acres of conservation habitat and is located less than an hour from London on the Isle of Sheppey. By offering a range of retreat based accommodation each with individual appeal, it has consistently been presented as a 5 star experience, as it places wellbeing at the heart of its proposition.

“Elmley has a restorative effect on those who visit. It is a special place to go to soothe the soul, find balance, order, and perspective; a place where we are able to reconnect with ourselves and emerge feeling lighter and reinvigorated”.



What are the learnings…

Elmley Nature reserve has developed a product that draws inspiration from the natural surroundings and uses this to create a brand proposition, around reconnection, relaxation and reinvigoration. They have connected to a direct consumer need and woven this into their overall proposition.

Traditionally the messaging around the UK’s National Trails, are that you have to walk or cycle a set distance to achieve any positive outcome. Both the National Trail and NDW websites focus on ‘distance travelled’ (which is normally between 4-10miles / or 3-6 day) rather than talk about how just being on the trail makes you feel. Although the trail doesn’t offer a whole package proposition, there are numerous accommodation providers offering bespoke/ unique accommodation options that could complement the trail as a place to take stock, breathe and reconnect, whether that’s based in one location or completing sections of route over a number of days. In reality, it is the same product, just the narrative has expanded to focus on how it makes you feel as well as what you can see.

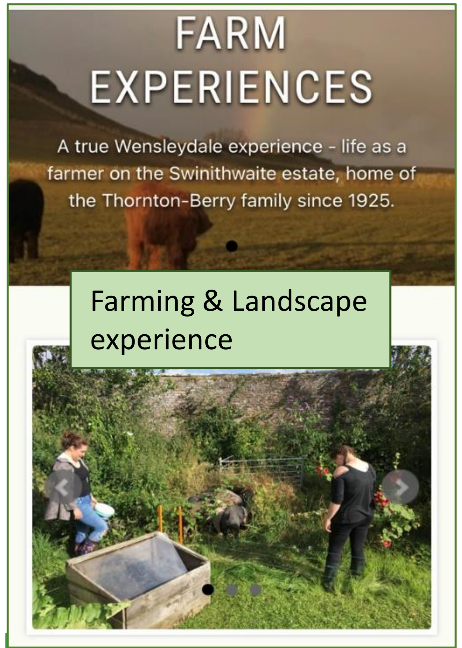
At one with nature – Getting close to wildlife and appreciating seasonal change increased in interest during lockdown as for many, they had the time to see the seasonal transition from spring to summer first-hand. Although the consumer has always been aware, lockdown accentuated the beauty and simplicity of nature and how this has a direct link to a personal sense of wellbeing. 4 out of 5 Britons live in a city or town environment, even in urban spaces the populations attention turned to nesting birds and surrounding trees, this was reflected in the viewing figures for the 2020 series of Spring Watch, which hit viewing figures of over 8 million per episode (putting it on a par with series 1&2 of Downton Abbey).

Example Case studies

The following case studies all offer active examples of how experiences can engage the customer with the countryside by combining other interests. All of these examples have development potential for the Swale Kent Downs area.

Foraging courses

Example: Extension of Accommodation and wedding venue offer
Grade II listed manor B&B now offers foraging masterclasses and creative writing courses inspired by the estate, offered to staying and day visitor guests.
Location: Worcestershire
www.elkingtonmanor.co.uk



Farming & Landscape experience

Example: Farm diversification – behind the scenes tours
Offering hands on experience feeding and caring for the animals, walking the farm / moving stock/ enjoying the National park landscape. Learning about the importance of farming to the local economy – sampling 'field to fork' produce via the provision of breakfast and lunch.
Location: Yorkshire – Part of the English National Parks experience
www.wensleydale-experience.com

Walks linking Heritage

Example: heritage trails combining visits to gardens with the ROW network. Foottrails are an established walking tour operator who package hidden gem heritage with local walking trails and rural based accommodation. Focusing on the experience not the miles travelled providing bespoke walking guide and insider knowledge for customers.
Location: SW England
www.foottrails.co.uk

Country skills courses

Example: Creative courses offered in a farming/ landscape location
Full range of creative country craft courses from jam making and basket weaving to blacksmithing &Bee keeping
Location: Shropshire
www.visitshropshirehills.co.uk
www.westhorpe.org.uk

Section 3: Understanding the best prospect customer

What can we learn from the visitor stats?

England Trip Stats: *(Incl London)*

1431 million day visitors

97 million overnight stay (Domestic)

32.7 million overnight stays (international)

SE England Trip Stats:

225.1 day visitors

16.2 million overnight stay (Domestic)

4.93 million overnight stays (international)

Visitors to Kent: *Visits*

Kent welcomes 65 million visitors

- 60.1 million day visitors (93%)
- 4.9 million overnight stays (7%)

(of that 1.1 million are international) (1.7%)

England - Day visitor market: Insights
No.1 reason for taking a day trip in England– **VFR** 346.1 m day trips
No.2 reason – going out for a meal
No. 4 reason – undertaking outdoor activity (107.9 m)
(more popular than shopping, attractions or events)

England - **Domestic** overnight market: Insights
46% are on holiday (of which 2/3 stay max 1-3 night)
36% are visiting friends or relatives
14% Business

England - **International** overnight stay market: Insights
40% are on holiday
32% are visiting friends or relatives
21% Business
Top 3 inbound markets (£) : USA, Germany, France

SE England Insights:
2nd most popular day trip destination after London
2nd most popular domestic overnight destination after SW England
2nd most popular international overnight destination after London

Purpose of visit

42% Holiday

39% Visiting Friends & Relatives (VFR)

15% business.

4% Study

What are the key observations for NDW & Kent Downs AONB?

✓ With 93% of Kent's visitors focusing on day visits and a further 5.3% domestic overnight stays - A **domestic leisure holiday market focus** should be the priority for positioning the NDW/ KDAONB offer. However consideration needs to be given to how this product can be adapted into bite size chunks that tick one or more 'reasons to visit' - i.e. meeting friends and family, getting outdoors and having a meal.

This does not discredit the value of the international visitor as they offer a higher spend per head; reaching these audiences could be more effective via partnership working with DMO's and DMCs.

✓ The SE of England is the second most **popular destination** in England behind London (day visit) or SW England (domestic stay), therefore to encourage visitors to engage with a walking trail, attention needs to be given to the immediate competitors.i.e. South Downs/ Ridgeway and Cotswolds Way. It would therefore be beneficial to analyze the NDW strengths that give it the edge over these immediate competitor routes – connectivity/ historical links to pilgrimage/ food and drink experiences accessible from the route.

✓ **VFR** – we know from the stats that nationally, VFR is the no.1 reason to choose a day trip in England and Kent actually has a slightly higher VFR figure than national stats. VFR generates a 'reason to visit' and following the 2020 restrictions on travel and meeting with friends and relatives, this will be at the forefront for the domestic market in 2021.
The VFR market has been somewhat overlooked in recent years, due to the fact that accommodation is often offered in peoples homes, so leading to a perceived lower visitor spend. However, VFR has a higher propensity to lead to hospitality spend and with the rise of the rural Airbnb offer, many VFR visitors are opting to stay near to loved ones rather than in their houses.

Source: Discover England Research – Outdoor activity report 2018; England tourism factsheet 2018, Kent Tourism Economic Impact study

Purpose of Travel

As seen on the previous page, the purpose of travel can be the key driver.. For Kent this breaks down into 4 areas. All could engage the visitor with the NDW or KDAONB product as both core activity or component part of trip.

1. **Holiday/ leisure (42%) – Core business**
    - NDW was a core component of holiday, walking the route in part or its entirety.
    - NDW/ KDAONB as a component countryside experience – circular routes/ key points of interest.
    - This will always be the core business focus for overnight stays for best prospect segments.
2. **Visiting Friends and Relatives (VFR) (39%) – Opportunity**
    - There is a potential to use VFR to encourage leisure visitors to walk the route (full or in sections) with friends or relatives – staying overnight on route
    - NDW/ KDAONB can be positioned as a component part of a countryside experience – circular routes/ key points of interest etc..
    - VFR offers an additional reason to travel, making actual travel plans time-specific rather than an aspiration. It is also the no.1 driver for UK day visits, therefore there is a great opportunity to focus on VFR to turn day visits into overnight stays.
3. **Business (15%) - Niche**
    - The MICE market of course focuses around business centres/ conference hotels and events, however there is an opportunity to build the NDW/KDAONB offer into the incentives market proposition via walking the route/ activities and experiences.
4. **Study (4%) – Opportunity/ Niche**
    - The appeal of Kent's coast has long been an attraction for language school students, and Kent, especially Canterbury, Dover, Folkstone and Thanet have a number of language schools. As this market returns after Covid, itinerary planners will be looking for product experiences that offer safe, economical and educational options. The NDW, with its close historical/ cultural/ spiritual links to pilgrimage and its extensive rail connectivity offers a great product for this day excursion market – equally prearranged lunch stops could be arranged with pubs/ farm shops/ producers and this is a great segment to target for building product around camping/ champing.

VFR EXAMPLE:
A VFR Comms campaign could be implemented by activating key community areas along the NDW to invite friends and relatives to join them on a mini adventure.

So often residents that that live close to a National Trail repeatedly only walk the section on their doorstep, often as a circular walk / dog walk. In the aftermath of Covid 19, Spring 2021 could be the perfect opportunity to launch a digital postcard invite campaign via local residents to invite their friends to visit and walk the NDW in full or in sections together.

<u>Key USP's could be used such as:</u>

- ✓ Following in the footsteps of history linking to pilgrimage,
- ✓ Spring flowers - Feb – April
- ✓ Autumn Colours Oct-Nov
- ✓ Pub walks – Food & Drink – wine tasting at vineyards.

Top level idea: Starter for 10
10 key starting points along the route could be selected and the immediate communities could be targeted to invite friends & relatives.

- ❖ 10 digital postcards of the NDW - views/ seasons/ points of interests/ food & drink/ pubs/ tearooms etc.
- ❖ Hosts/ invitees could then download 'host packs' to help them plan routes, plan lunch stops and book accommodation for longer sections/ plan rail journeys.
- ❖ Local business at the 10 key points could be offered the opportunity to offer mid week discounts on breakfast/ lunch/ dinner deals – specifically for off season periods
- ❖ Digitally delivered via SM and NDW website.

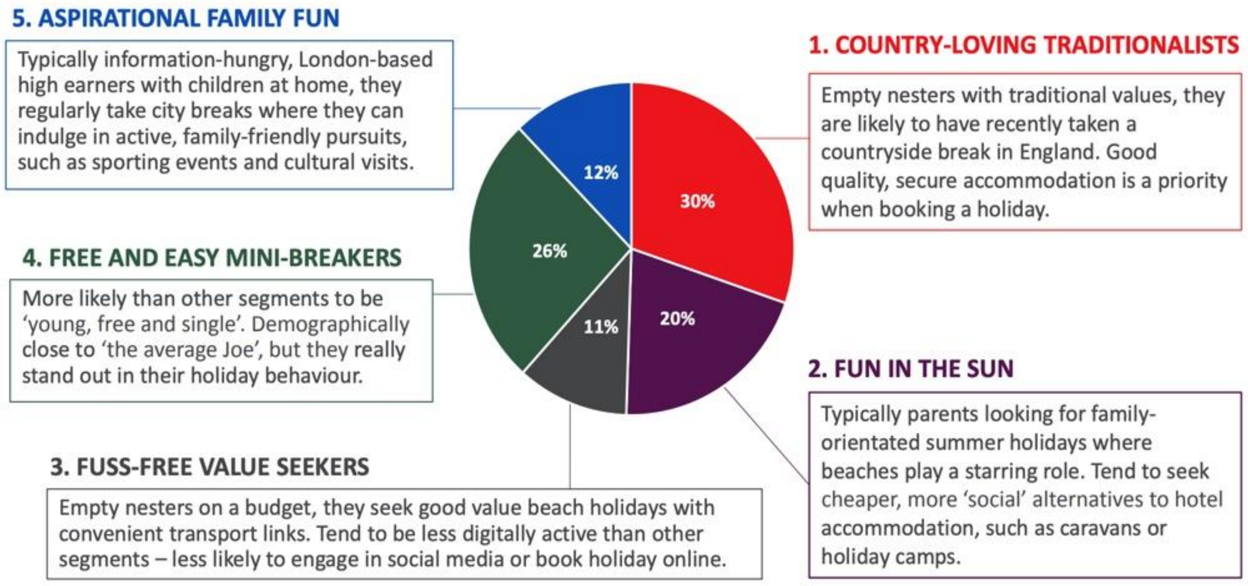
MICE: Meetings, Conferences, Incentives & Events

The Domestic Market – Lifestyle Segments

Kent stats recap - 60.1 million are day visitors (93%) 4.9 million are overnight stays (3.8 million domestic overnight)

The 2016 VisitEngland customer segmentation research highlighted 5 core lifestyle segment groups as best prospect for a domestic overnight leisure stay.
All have the potential to engage with the countryside product, however there are 2-3 segments who show a greater inclination to choose the countryside as part of their leisure activity.

1. Country Loving Traditionalists – NDW/ KDAONB current lead segment (both the walking and walking plus product)
2. Aspirational Family Fun – Walking as part of a wider trip/ day visit market
3. Free and Easy Mini Breakers – Walking as part of a wider trip or incorporated into a specific experience e.g. Foraging



In addition the Millennial and Gen Z segments are also worth noting, as they are increasingly drawn to the countryside to engage in outdoor activity. Also sustainability plays an increased role in their destination decision making including accommodation choice and in-destination transport.

Additional points for consideration for the NDW/ KDAONB

COUNTRY-LOVING TRADITIONALISTS

- ✓ Largest domestic travel segment, repeat visitor.
- ✓ Countryside is primary driver, also local food & drink, heritage, meeting locals
- ✓ Influenced by press articles & WOM, also active on SM (FB & twitter)

Example products: - Casual/ moderate/ long distance walkers
Short breaks staying at local Pubs/ B&B's, walking to visit key locations such as historical sites, vineyards, cider makers or destination restaurants – opportunity to link to product experiences such as wine tasting, historical walks, behind the scenes – Self guided and group experience potential.
This is also a great segment to tap into for VFR invite

ASPIRATIONAL FAMILY FUN

- ✓ Strong London based segment looking for experiential learning/ activities
- ✓ Cities and family based attractions are the main drivers, however increasingly as parents strive to disconnect their children with tech, they are looking to countryside/ nature experiences. E.g. bush craft/ camp building.
- ✓ Influenced by SM (Instagram/ FB) influenced by peer recommendation

Example products: - casual walkers
½ day circular walks / experiences that are fun, but have an experiential learning element. This segment may also be family members of the NT or EH – respond to environmental, skill based, horrible histories themes.
There is also the opportunity to highlight how close the NDW/ KDAONB offer is to main tickbox attractions such as Howletts/ Port Lymne, Canterbury punts.

FREE AND EASY MINI-BREAKERS

- ✓ Traditionally seen as city breakers, this segment is now seeking new experiences driving the under tourism trend – a walking and cycling NDW experience could appeal – also link to city and town culture product – Folkstone/ Canterbury
- ✓ Experience led – Foragers, wild cooks, wine tasters, active, public transport users
- ✓ Heavily influenced by Instagram/peers/ blogs they are influencers/ book online

Example products:
Experience and time led – 'package the product as short breaks 24/ 48/ 72 hour options – informal comms… "fancy a weekend in the country?"
For full segment pen portraits see - Appendix 2

Sources: *VisitEngland product-centric tourism segmentation report Feb 2016; Discover England Research – Outdoor activity report 2018; Natural England 2019 - Monitoring of Engagement with the Natural Environment*

The International Market – Lifestyle Segments

In 2016, VisitBritain profiled the key international markets into lifestyle segments (leisure travel), the prominent groups are highlighted below.
In addition, for Kent it is worth also considering opportunities with the youth/ language school market due to their concentration on the South East coast.

The 2 most likely segments to engage with the NDW/ KDAONB product are:

1. Buzzseekers
2. Explorers

Key differences for the international markets are:

✓ *A greater desire to engage with traditional/ landmark experiences like, going to the pub, fish and chips and afternoon tea. British icons are also of high interest, but they are keen to experience them in different ways.*
✓ *Booking via a DMC/ Tour operator as well as direct.*
✓ *Greater concerns over countryside connectivity and ease of travel*

Relaxed Sightseers

- Family focused, sightseeing, coach tours out of London, big on shopping and food, prefer known hotels, safe destinations
- Generally 45+

Priority segment

Buzzseekers

- Independent, city break, short stay – Europe hop-overs, price sensitive, looking for immersive experiences – live like a local
- USA 8-10 day stay, local experience/ food & drink
- 18-24, 35-44

Priority segment

Explorers

- Cultural Tours, heritage interest, alternative/ out of city accommodation,, travelling for events , Independent, seeking heritage/ cultural experiences
- Food & Drink, Countryside, heritage
- Generally 55+

Kent stats recap - 60.1 million are day visitors (93%) 4.9 million are overnight stays (1.1 million int overnight)

Best prospect market focus

France

✓ UK's #2 market for visits and #4 for spend – lead inbound market for Kent
✓ Primary segment – explorers
✓ Good market for seasonal spread/ student language school market

Example products:
Interested in Cultural Heritage, high propensity for Airbnb bookings.

Germany

✓ UK's #3 market for visits and #3 for spend – lead inbound market for Kent
✓ Primary segment – Explorers & Buzzseekers
✓ Ok market for seasonal spread, slight skew to Jul-sept

Example products:
High interest in Food & Drink, countryside & nature, history & heritage, and famous icons - no.1 European market for self drive to Britain.

Netherlands

✓ UK's #7 market for visits and #10 for spend – lead inbound market for Kent
✓ Primary segment – Explorers & Buzzseekers (high % of solo travelers)
✓ Good market for seasonal spread

Example products:
High interest in countryside and nature, outdoor activity, history and heritage, Food & Drink - % of camper/ camping market, value conscious.

USA

✓ UK's #1 market for visits and #1 for spend – Day visitor market from London small overnight market for Kent
✓ Primary segment – Explorers & Buzzseekers
✓ Skew to summer months

Example products:
Sightseeing, pubs, heritage and meeting locals – huge appeal from Canterbury Cathedral and Dover cliffs. Potential to reach this market via targeting travel trade/ DMC's to package an experience product e.g. Walking in the footsteps of pilgrims, walking to the oldest Cathedral in Britain. 1-2 hour experience.

Sources: *VisitBritain product-centric tourism segmentation report Feb 2016; VisitBritain Market profile snapshots – France, Germany, Netherlands, USA*

Partnership Working Opportunities

Working with the Accommodation sector

All of the experiences highlighted in this document, offer the perfect partnership opportunities to the accommodation sector, to extend their seasonal occupancy. whether it's a family run B&B that's located minutes from a fossil hunting beach, or a hotel that will provide packed lunches for walkers. For the NDW, there is an opportunity to work with rural Airbnb accommodation providers. Although this can be a point of contention for some district partners, there may be an opportunity to develop an accommodation ambassador programme, similar to walkers welcome which will offer a level of service reassurances to both customer and council partner. When the accommodation provider is in-tune with the local experience offer, they add greater value to the customer.

Working with the Travel Trade

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

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

Working with the private sector

- ✓ Transport - Off Peak and Weekend walking and cycling routes linking to the rail network.
- ✓ Partnership opportunities with hospitality businesses such as Shepherd Neame to develop circular route itineraries incorporating their Pubs and accommodation along the route.

Working with the public sector tourism teams

- ✓ Review all content on district/ country and national websites (ROW and Tourism) – does it showcase the trail as a wider experience.
- ✓ Working in partnership with DMO's to extend the reach to the travel trade and the wider leisure travel audience (Domestic & International)

Product Options Analysis RECAP

Section 1 - Key trends:

- ❖ **Transformative Travel** – A travel experience that leaves you positively changed, often used to describe the experience of walking the Camino and could form the basis to develop a 'new' form of pilgrimage product along the NDW that engages the visitor.
- ❖ **Culinary** – The NDW and KDAONB has one of the richest concentrations of vineyards, producers and growers than any other National Trail. This is most definitely a USP and needs to be interwoven with the promotion of the trail.
- ❖ **Reconnect and Go local** – Visitors don't want to feel like a tourist, they want to feel like a local. Both International and domestic visitors want to reconnect with each other and with nature (especially following Covid). This offers the prime opportunity for locally based experiences whether it's wine tasting or foraging. This current global need to reconnect with loved ones also offers a great opportunity for a VFR push.

Section 2 - Understanding the product:

- ❖ Trail walking and cycling as a stand alone proposition only appeal to a % of the potential audience.
- ❖ Developing a 'walking-plus' product will appeal to a wider audience, the products with the greatest appeal include:
    - ❖ **Iconic Attractions** – NDW has both the oldest cathedral in Britain and the White Cliffs of Dover, showcasing how these iconic attractions can be experienced in a different way by being on the trail, becomes a USP.
    - ❖ **History & heritage** – From pilgrimage and literary inspirations such as Dickens to the illegitimate son of Richard III… they are all on the trail or near by
    - ❖ **Food & Drink** – This is a real USP for the NDW. Looking a little wider than the immediate trail, link to vineyard tours, Cider making demos, wild dining/ cooking and foraging – Pubs are a key point of interest for both domestic and international but not just the ale, it's the whole experience – food, stories, ghosts, history, people.
    - ❖ **Rural life** – The pubs and villages are a key part of the appeal, both on and near the trail. E.g. Lenham is 10 minutes off the trail, boasts an abundance of heritage, a hotel, bakers, tearooms and an amazing fish & chip restaurant. Equally, farm visits and accommodation, and the opportunity to offer rural crafts and pursuits in location, such as basket weaving or bushcraft.

Section 3 - Targeting the best prospect customers

Domestic Market - Lead focus

1.Country Loving Traditionalists
2. Aspirational Families
3. Free & Easy Mini breakers
Engage direct via active SM, web content, press, Partnership content.
Engage local communities via a VFR campaign

International – Secondary focus

1. Explorers
2. Buzzseekers
Work in partnership with:
DMO's for destination product promotion for leisure travel
DMC's to package walking-plus product delivered by local experience businesses (via the interegg project)

Clear Brand Identity

Underlying all of this, there is a need for a clear brand identity for the NDW.

1. Social Media delivery needs to work harder
2. Walking plus content needs to be positioned alongside the trail info to broaden the appeal
3. Strong imagery of trail, people and experiences
4. Customer insights - Cross check product with the consumer

Appendix 1. Strength, Opportunity and Gap analysis– Focusing on NDW and Kent Downs AONB area **only**

Please note This is not a definitive list of the county's tourism product, this listing relates to the AONB area only.

Strength (S) – The product is already established but could be more experiential/ season lengthened

Opportunity (O) – There is an opportunity to develop this product to raise the profile of the area through experience

Gap for development (G) – There is a consumer interest and potential for the destination to showcase this product

Seasonality Key for product delivery (Actual and Potential)

High	Potential for high product delivery in this quarter – This product may not be currently delivering in these months
Med	Potential for Medium level product delivery in this quarter due to - weather, product, availability of local support
Low	Low product delivery in this quarter due to – Reliance on weather, volunteer base, product availability

		AONB INTERREG PROJECT PARTNERS												
Product Grid	Kent Downs AONB	Dover NDW/AONB	Canterbury NDW/ AONB	Ashford NDW/AONB	Gravesham NDW/AONB	**Swale NDW/AONB**	Folkestone & Hythe	Medway	Sevenoaks	Maidstone	Seasonality Jan - Mar	Apr -June	July - Sept	Oct -Dec
Walking & Cycling	S	O/G	O/G	S/O	O	**O**	O/G	O	O	O				
Wildlife	S	S/O	S/O	O	O	**S**	S/O	O	O	O				
Food & Drink	S/O	O	S/O	S/O	O/G	**S**	S/O	O	O/S	O/S				
Hidden Heritage/ Behind the scenes	S/O	O	S/O	S	S/O	**O**	S/O	S/O	S	S				
Foraging	S/O	O	O	O	O	**O**	O		O	O				
Agriculture	S/O	S/O	S/O	S	O	**O/S**	S/O		O/S	O/S				
Pilgrimage	S/O	S/O	S/O	O	O			O	O	S/O				
Wellbeing	S/O	O	O	O	O	**S/O**	O	O	O	S/O				
Photography	O/G	O/G	O/G	O	O	**O**	O/G	O	O	O				
Vineyards	O	O	O	S	O		O		O	O				

Product Grid	Kent Downs AONB	Dover NDW/AONB	Canterbury NDW/ AONB	Ashford NDW/AONB	Gravesham NDW/AONB	Swale NDW/AONB	Folkestone &Hythe	Medway	Sevenoaks	Maidstone	Seasonality			
											Jan - Mar	Apr -June	July - Sept	Oct -Dec
Horticulture/ Gardens	O	O	O	O	O	**O**	O		O	O				
Creative courses	O	O	O	O	O	**O**	S/O/G	O	O	O/S				
Outdoor pursuits	O	O	O			**O**	S		O	O				
Fossil Hunting	O	O					S/O							
Archaeology	O	O/G	O/G					O	O					
Military heritage	O	S	O	O	S/O		S/O	S						
Events	O	O	S/O	O	O	**O**	S/O	S/O	O	O				
Multicultural	O	0	O	O	S/O	**O**	0	O	O	O				
Lux escapes			O	O		**O**			O	O				
Maritime		O	O		S	**O/S**	O	S						
Cooking	O	O	O	S/0	O	**O**	S/O	O	O	O				
Family/ small group focus	O	0	S/0			**S**	O		S	O				
Bespoke tours	O	O	O	O	O	**O**	O	O	O	O				
Seafood		O	O			**O**	S/O							
Fishing		O	O			**O**	O							

#1 Country-loving traditionalists

Typically empty nesters with traditional values, country-loving traditionalists have a moderate household income, but fewer family members to cater for when on holiday. This means that their budget stretches further, and good quality, secure accommodation is a priority when booking a holiday. They are likely to have recently taken a countryside break and keep up to date with UK tourism through websites such as English Heritage and the National Trust.

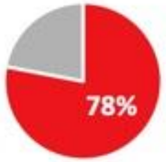
INCOME
AVERAGE
No skews to average income – 51% in the £20K-£45K HH income bracket

LIFESTAGE
Married/living with partner **(73%)** with no children **(81%).** **Nearly half** are aged 55+

LIVE
More likely to live in East/Anglia and South East (29%, Index*: 108)

MEDIA
Higher than average consumption of broadsheets **(27%)** and UK tourism websites **(15%)**

ENGLAND TOURISM



Visited England in the last 12 months

2.3 holidays a year (typical share of holiday type)

ON THEIR MOST RECENT TRIP...

Typically a countryside break **(64%)** for two **(58%)**

59% didn't stay in a hotel, being more likely than other segments to prefer the 'personal touch' of a b&b or rented accommodation

54%
Booked directly through the accommodation provider, not an intermediary

Spent time exploring the countryside **(65%)** and/or small towns **(57%)**

TOP PRIORITIES IN CHOOSING A HOLIDAY

IMPORTANCE	% T2B	Index*
Unspoilt countryside	79%	**105**
Clean and tidy environment	77%	**104**
Opportunities to eat/drink local food/produce	63%	**104**

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Index* of mean score**
Offers a wealth of cultural experiences	110
Makes you feel connected to the country's history and heritage	109
Has beautiful countryside	109
Is an ideal place for people like me	109

This data was compiled from extensive consumer research contacted in 2015/16. therefore it is worth noting a few additional considerations, such as the growth in technology use over the past 5 years and the impact of Covid 19 on consumer travel choices and priorities.

Source: VisitEngland product-centric tourism segmentation report Feb 2016

#5 Aspirational family fun

Typically London-based high earners with children at home, this segment regularly takes city breaks where they can indulge in active, family-friendly pursuits, such as sporting events and cultural visits. They are information hungry: avidly consuming mainstream media (especially newspapers), active on social media, and actively browsing holiday booking websites to evaluate and book their holiday accommodation.

INCOME

HIGHER

Skew much higher incomes.
- **67%** with HH income £35K+ (45% over £45K)

LIFESTAGE

Tend to be male **(57%)** and aged under 50 **(92%)**. Segment most likely to have children **(62%)**

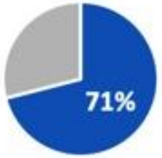
LIVE

Much more likely to live in LONDON (26%, index*: 174)

MEDIA

Highest consumption of broadsheets **(31%)** and free newspapers **(18%)**. Visit UK tourism websites **(15%)**

ENGLAND TOURISM



Visited England in L12M

↑ 2.7 holidays a year

More likely to take a longer holiday than other segments (↑ 18% share of holiday type)

ON THEIR MOST RECENT TRIP...

Typically a city break **(45%)** for at least 3 people **(55%)**

54% stayed in a hotel, with **1 in 5** opting for a b&b instead

34%

Chose the convenience of booking through an aggregator website, the segment **most likely** to do so

More likely than others to spend time at a theme park **(22%)**, zoo/ aquarium **(20%)** and/or sporting event **(12%)**

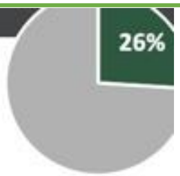
TOP PRIORITIES IN CHOOSING A HOLIDAY

	% T2B importance	Index*
Good nightlife	49%	148↑
Availability of festivals, music, sporting and cultural events	51%	144↑
Good range of water-based/beach activities	50%	131↑

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Index* of mean score**
Offers great entertainment / nightlife	116↑
Makes me feel like I'm doing less harm to the environment	121↑

Source: VisitEngland product-centric tourism segmentation report Feb 2016



#4 Free and easy mini-breakers

Typically more likely than other segments to be young, free and single, free and easy mini-breakers have an average household income; however they are able to indulge in a wealth of activities when on holiday, possibly due to their lack of children. This segment is demographically close to 'the average Joe' (with few skews), but it is in their holiday behaviour that they really stand out from other segments.

INCOME
AVERAGE

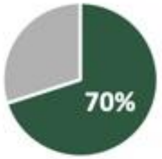
43% in the £20K-£45K HH income bracket; some high earners (**1 in 4** earning £45k+)

LIFESTAGE
Segment most likely to be single **(38%),** no kids **(83%)** and aged under 55 **(70%)**

LIVE
More likely to live in the North (East or West) – **21%,** (Index* 113)

MEDIA
Higher than average consumption of broadsheets **(24%)** and strong users of social media **(66%)**

ENGLAND TOURISM



Visited England in L12M

2.1 holidays a year.

Skew towards taking a short break (↑ 66% share of holidays)

ON THEIR MOST RECENT TRIP…

Most likely to be a city break **(73%)** for two **(59%)** over 1-3 nights **(87%)**

71% stayed in a hotel, with B&Bs the only alternative considered **(19%)**

71%

Chose to book their accommodation online; along with segment #5, the segment **most likely** to do so

More likely than others to shop **(57%),** explore the city **(55%),** visit a museum or gallery **(31%)** and/or indulge in cultural entertainment **(29%)**

TOP PRIORITIES IN CHOOSING A HOLIDAY

	% T2B importance	Index*
A destination that is easy to get to by public transport	46%	122
Easy to get around by public transport	50%	120
Availability of festivals, music, sporting and cultural events	39%	111

ATTITUDE TOWARDS A HOLIDAY IN ENGLAND

	Mean score**
Has beautiful countryside	1.39
Has interesting towns and cities	1.31
Is easy to get to	1.26

Source: VisitEngland product-centric tourism segmentation report Feb 2016

This research report has been produced by

SW Consulting

Conducted as part of the Interreg Channel Experience Project and co-financed by the European Regional Development Fund.