

Faversham Area Tourism Development Framework And Faversham Area Tourism Survey

Faversham Enterprise Partnership, October 2010



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A. Faversham Area Tourism Development Framework (2011 – 2016)

1. Introduction

Drawing on the findings of the tourism survey work recently undertaken by Tribal Voice Communications (TVC) on behalf of the Faversham Enterprise Partnership (FEP), and reflecting both market trends in the UK tourism industry and developments in the Faversham area, this document provides an update to the Faversham Area Tourism Development Plan (2005 – 2010) providing a framework for tourism development over the next five years (2011 – 2016). It has been prepared to act as a continuation of the original plan and should hence be used in conjunction with it. Any changes in strategic direction are documented, along with outlining priority actions for future tourism growth in the area.

Tourism development focuses on the range of infrastructure and facilities that might attract or provide for visitors to the area – the various forms of overnight accommodation, visitor attractions, events, special interests and themed activities, and the built and natural environment. In addition, this document outlines a marketing strategy to attract new and repeat visitors, increase tourism related income and further develop and strengthen the Faversham area tourism brand.

This tourism development framework was commissioned by the FEP and undertaken to a brief prepared by the FEP manager. The exercise was funded by grants awarded by Faversham Town Council (FTC) and Kent County Council (KCC) via the town's county councillor Cllr Tom Gates.

2. Current Situation

In 2006 (latest figures) tourism to Kent and Medway was a multi-billion pound industry worth an estimated £2.5 billion and supporting circa. 50,000 jobs (7% of total employment), and has grown year on year. The county's population is predicted to grow by nearly 10% in the period between 2006 and 2021. This, along with the planned construction of a large number of new homes and office and industrial accommodation, mean the demand for hotels and other tourism facilities from residents, businesses and visitors will continue to increase.

Drilling down to a local level, tourism expenditure in the borough of Swale was estimated to be £187 million in 2006, supporting 3,873 jobs (6% of local employment). This consisted of 4.1 million day trips and circa. 400,000 overnight staying trips. Overnight trips in the Swale area have hence been in decline (down 22% between 1998 and 2006), whilst the volume of day trips has increased in the same period (up 21%). The majority of visitors (91%) in 2006 were domestic tourists, indicating no change from 2003.

Faversham's tourism stakeholders have worked hard over the past five years to drive the development of the tourism industry in the area forward. Critically, tourism research data collected

recently from Faversham Area Tourism Association (FATA) members showed an upward trend in tourism volume over the last five years, in a time when recession has taken hold in the UK. The growth in the area is clearly indicative of a strong market, which has held up even in the challenging market conditions. Tourism volume grew by between 5 and 10% over this period, with an average 9.1% volume growth reported by visitor attractions, pubs and restaurants in the year from 2008 to 2009. The growth seen by this sector is higher than the growth experienced by accommodation providers in the area (up to 5% volume growth over the last five years) showing that the growth in day visits has outstripped that of overnight stays. Detailed volume and value data are not currently available for the Faversham area.

The 5% accommodation volume growth from 2005 appears to represent a significant contrast to the overall Swale record, down 22% in the period from 1998 to 2006. Faversham area growth in both day and overnight visitors is a strong indicator that the work of FATA, FTC, FEP and local businesses has been effective.

But what of the future? How can the Faversham area continue to realise its tourism growth potential? How can it compete effectively for visitors to Kent? What can be done to increase the area's competitiveness as a visitor destination over the next five years? Building on work carried out during the last five years, this framework document sets out a strategy to achieve this.

3. National Tourism Development Trends

A number of factors will determine which tourism and leisure products will be popular in the future, as well as those that are likely to decline in popularity. Key amongst these are changes in the population and in the drivers of consumer demand for tourism products and experiences.

The following trend data has been extracted from Kent Tourism's Development Strategy. It provides important background to inform the development of the Faversham area's tourism development framework.

Tourism has been Undergoing Rapid Change¹:

- The number of people taking long holidays at home has been in long-term decline as the number of holidays taken abroad has risen.
- Those taking long holidays at home have increasingly been demanding self-catering accommodation (as opposed to hotels and B&Bs) in attractive rural areas (as opposed to coastal resorts). This is hence a potential growth sector for Faversham's rural areas.
- The number of short breaks taken by UK residents has grown, especially to cities. City breaks are the key driver of short break growth.

¹ "Facts About UK Domestic Tourism", British Resorts and Destinations, 2008 (www.britishresorts.co.uk), "Key Tourism Facts" and "Trends and Forecasts", Visit Britain, 2008 (www.touristtrade.org.uk)

- Even more dramatic has been the increase in visits to friends and relatives (VFR). This is an important potential growth market for the Faversham area.
- Business tourism has also expanded at a rapid pace in line with recent growth in the economy prior to the current slow-down. This has worked to the benefit of urban or near-urban destinations.
- Day visits continue to increase and represent the majority of trips to Kent and other destinations. However recent years have seen a huge growth in day trips to non-traditional forms of visitor attractions – shopping centres such as Bluewater have become destinations in their own right, combining shopping with a range of leisure opportunities such as places to eat and cinemas.

Key Visitor Market and Tourism Development Trends:

- Changes in working lives that are leading to people taking shorter holidays, more often, and booked at the last minute.
- Ever increasing use of the Internet by consumers to research and purchase tourism products, and by destinations to target potential visitors.
- Concerns about the environmental impact of flying. The carbon footprint of holidays etc may start to persuade more UK consumers to holiday at home in future.
- People are becoming increasingly more sophisticated, well-travelled and discerning, demanding better quality and service and looking for more rewarding experiences.
- Increased willingness to pay for quality, convenience and flexibility and increased trading up to luxury and 'special' experiences.
- Eating out and shopping have become leisure activities.
- 'Health and Well Being' tourism is on the increase.
- Demands for activity based holidays, such as walking, cycling and more extreme activities are increasing.
- A move away from packages to individual leisure experiences arranged independently, which is being demonstrated nationally in a sharp drop in tourists on group 'holiday tours'.
- Significant growth in cultural tourism reflected by increased attendances at cultural events.
- The development of branded boutique and town-house hotel accommodation in towns and smaller sized cities, fuelled principally by business tourism and short and weekend breaks.
- The development of resort hotels, typically with golf course(s) and spas, increasingly with adjacent villas for purchase or fractional ownership, normally within fairly easy reach of

urban areas, which rely on a combination of business (in this case, meetings and conferences) and leisure trade.

- Major new cultural facilities as key elements of economic development and urban regeneration strategies as well as key elements of local cultural and visitor economy strategies.
- The competition from residential developers for development sites that might otherwise accommodate new hotels or tourist attractions.
- Increased diversification of traditional visitor attractions aimed at strengthening their appeal and repeat visits potential, through the development of new facilities, activities, events etc.

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

Short Breaks and Business Tourism:

According to market research by MINTEL², the short break is increasingly the holiday of choice for the cash rich, time poor, domestic tourist and changing demographics, such as the continued expansion of the middle classes and the 45–54 age groups will ensure this trend continues. International flight security, sustainability and climate change may also mean a growth in domestic tourism. This will also impact on demand for short breaks.

Business visits, people visiting places for conferences, exhibitions, and business meetings in the UK continue to grow significantly. Although this has been affected by the current economic downturn, the World Tourism Organisation predicts³ business travel to rise at a faster rate than leisure travel until 2010 and events (business, sporting and cultural) are likely to be one of the main beneficiaries of the London 2012 Games. Research carried out on behalf of the British Association of Conference Destinations (BACD)⁴ in 2007 valued the business tourism sector at more than £22 billion.

² “Short Breaks Market Report”, Research and Markets, 2006, and “City and Short Breaks – UK”, MINTEL, 2006.

³ “The Role of Business Visits and Events in Destination Management”, Kenny Boyle, Visit Britain, TMI Hot Topic event, London, May 2008

⁴ British Conference Venues Survey 2007, The Right Solutions Ltd on behalf of BACD

A 2008 report by Visit Britain⁵ also indicates that:

- up to 40% of business travellers may return as leisure travellers
- business visits offer a much more favourable seasonal platform than leisure tourism
- business visitors have the highest spend per day of any sector

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

Tourism in Town and Country Areas:

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

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

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

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

Activities such as walking, cycling and horse-riding remain important ingredients of the rural offer to visitors. The "Walking Pages" website lists 26 walking festivals taking place throughout England in

⁵ "Foresight" Issue 55, May 2008, Visit Britain

2008 and search engines indicate that there are numerous companies offering walking and cycling short breaks.

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

4. Faversham Area Visitor Markets

A key ingredient of the successful development of a visitor destination is strategic focus. This means being clear on what the offer and experience of the place is and who it is for – targeting potential visitors in particular market segments.

4.1 Target Markets

The Faversham area's priority target markets remain:

- **Empty Nesters, 45-70, AB, children left home**

Empty Nesters are the number one priority target market for the Faversham area. Not only does the area have a wealth of product that matches the needs of this market, but also the recent MINTEL market research highlighted the continued expansion of the middle classes and the 45–54 age groups. This is hence a market segment of vital importance to the future growth of the Faversham area tourism economy.

- **Wealthy retired couples, 55-75**

With an ageing population, this market presents an attractive market for the Faversham area to continue to target into the future.

- **DINKS, 25-45, ABC1, joint income > £50k**

To date, the DINKS market has been an aspirational one for the Faversham area. The Faversham area, however, now has a growing selection of quality product suitable for this more 'trendy', discerning, upmarket, visitor market, e.g. Read's Restaurant with Rooms (a boutique hotel), the circular walks and food trails product, a range of trendy eateries and pubs (e.g. ASK and a variety of gastro pubs including the Dove at Dargate, the Sportsman at Seasalter, the Three Mariners at Oare and The Plough at Stalisfield Green etc.). As such there is a growing critical mass of product available which, if positioned and marketed correctly, could begin to successfully attract this market over the next five years. Further product, however, will need to be added targeted at this specific market to give the area credibility as a DINKS visitor destination, along with adopting a different marketing approach (compared to that for the older couples market).

Geographical Markets:

Geographically all of the area's priority target markets will be couples living in the UK within a 3-4 hour drive time of Faversham (including the local Kent market for day trips) - particularly London and the Home Counties. The overseas market is a small market to the area (10% of visitors and not growing) and given the constraints of marketing budgets is a secondary target market.

The Groups Market:

As previously recommended, Faversham should pursue a modest groups acquisition strategy, focussing activity on increasing coach business to those attractions located outside of the town that have suitable group facilities and coach parking and to town attractions that can be serviced by existing facilities and coach parking. The town itself does not have the facilities to cater for major expansions of the groups market without significant new investment in coach parking facilities and other group amenities. This is not desirable as the attraction of Faversham is its unspoilt, small town feel that would be degraded if mass-market, large groups were attracted. Furthermore, national tourism trend data shows a decline in this market with a strong move away from group tours to individual experiences and focusing resource and expenditure into such a declining market would not be efficient or productive use of limited funding and staff-time.

5. Marketing Strategy

The aim of the tourism marketing strategy for the area is to increase the volume and value of tourism to the Faversham area by encouraging target markets to:

1. Visit the destination for the first time
2. Repeat visit
3. Stay overnight
4. Increase their length of stay
5. Stay in low season to reduce seasonality

The recent tourism survey work results show that the majority of visits to the area currently are day trips (81%), predominantly by people that live in Kent.

The key thrust of the marketing strategy over the next 5 years hence needs to position the Faversham area as a short break and longer holiday destination (i.e. convince people there is more to do in the area than for a day visit), along with encouraging visitation from its target markets (both lifestyle and geographical) for the first time, on future occasions, and throughout the year.

On a positive note, the tourism survey work showed that previous visitors to the area, and those that may be interested in visiting in the future, take short breaks (1-4 nights away from home) with their partners all year round. Key motivators for this are major events and festivals, sampling seasonal produce along with, highest ranked by visitors, the changing face of the countryside

throughout the year. These are the aspects that need to be effectively captured and communicated in the area's marketing campaign work.

Over the past five years Faversham has grown its short break business (up to 5%), but an even more concerted effort is required over the next five years. Faversham is still predominantly perceived as a day trip destination. Perception however lags reality on the ground, as the product has developed significantly over the past five years, specifically its rural and food and drink offer, and there is now much to do in a small, concentrated area that would motivate short breakers to visit if they were aware of this. The perception of the area as a day trip destination is compounded by Faversham's logo strapline (Market Town of Kings) which cements the area's positioning as a small town. The wider short breaks offer in the area (particularly the countryside offer) needs to now be more vigorously presented and promoted through a revised brand positioning and a marketing communications strategy focused on short breaks and longer stays in the area.

Furthermore, the tourism survey work has shown that Faversham suffers from a lack of visitor awareness – the tourism survey showed that the main reason (25%) for not visiting the area is that people have never heard of it or have insufficient knowledge of it. Nevertheless the research showed that the area has the right mix of characteristics to develop further. An important element in this respect is the marketing of its local distinctiveness, for instance through the promotion of the area's small, family-run shops, restaurants and other businesses that create a distinct offer and appeal.

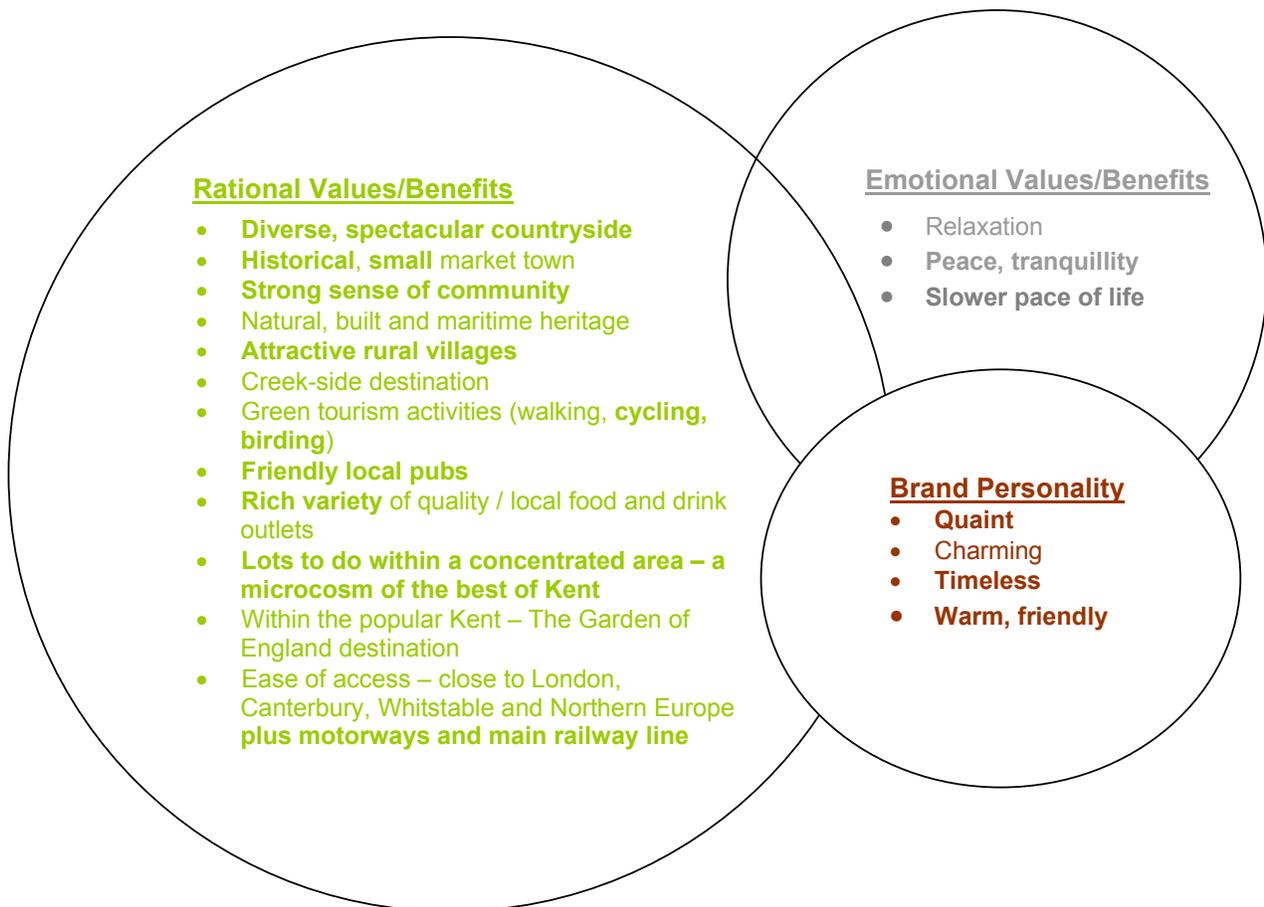
5.1 Brand Positioning

The 2005 –10 tourism development plan recommended a repositioning of the Faversham tourism offer away from its previous historic market town focus to a more diverse, motivating, offer summarised the area's key strengths from a tourism perspective.

This brand positioning was recently tested with visitors (past, present and future) in the tourism survey work commissioned by FEP and it was shown to be extremely motivating to the area's target markets. Not only has this brand positioning motivated new prospects to visit, but it was shown to be unique, authentic and creating a 'sense of place'. It is also what current and previous visitors report their experience of the area to actually be, i.e. it is credible.

Drawing on this survey work, the brand positioning for the next five years has been tweaked to make it more competitive and to reflect key visitor likes of the destination (see Fig 1). The revisions to the 2005 brand positioning are shown in bold type.

Fig. 1 Faversham Brand Positioning (2011–16)



Positioning Statement – the Heart of the Brand

Faversham - Kent's accessible, timeless, quaint, charming, creek side small market town, set amidst diverse, spectacular countryside and attractive rural villages, with heritage, quality food and drink outlets and green tourism activities offering visitors relaxation, peace, tranquillity, a slower pace of life and a warm, friendly welcome.

These revisions to the area’s brand positioning reflect the recent tourism survey work, which showed that visitors considered the best attributes of Faversham to be **(in order of visitor priority)**:

Beautiful, unspoilt, ever changing, countryside
Quaint, charming, unspoilt, small, ancient, rural market town with a timeless feel and a slower pace of life
Opportunities for walking and promoted walking routes
Atmosphere/ambience – a friendly place with a warm welcome and a strong sense of community where people have time for one another
Historical setting, historic sites and houses
Local pubs and good beer
Food offer – variety and range of quality eateries from restaurants, coffee shops and tea rooms
Architecture and interesting buildings
Equal ranking were: <ul style="list-style-type: none"> • Creek-side / Standard Quay / barges • Location – easily accessible from London, Canterbury and other areas of Kent
Equal ranking were: <ul style="list-style-type: none"> • Relaxing place – peace, tranquillity and fresh air • Oare marshes, Oare creek • Small, independent, quaint shops, including antique and junk shops
The beautiful surroundings and holiday feel

Research has shown that these are the aspects of the area’s tourism offer that visitors find most motivating and should hence form the focus of future promotional activity in line with the revised brand positioning for the area.

Copy and Imagery

All future copy and imagery used in marketing communications (website, area guide, press releases, etc.) needs to reflect the brand positioning and be written in a ‘tone of voice’ that is appropriate for the area’s target markets.

The copy in the 2010 Area Guide, for example, accurately reflects this positioning (apart from the now important warm and welcoming and timeless personality of the destination) and is written in a tone of voice suited to the Empty Nesters and Wealthy Retired Couples markets. The imagery, however, does not reflect the brand positioning and hence does not visually portray the diversity of the tourism offer in the area.

Over the next five years, if the area is to reposition itself as a short breaks destination and attract new visitors, it needs to revise its brand positioning across all its communications. It will also need

to build a photo library that reflects the diversity of the offering for use in future marketing communications.

Finally, the destination will need to grapple with the challenge of producing marketing collateral that is targeted at both Empty Nesters/Wealthy Retired Couples and the DINKS market. The tone of voice that is motivating to DINKS is very different to that for the older couples market. For example, research has shown that Charming and Quaint are words that attract the older couples market, but are a turn-off for the DNKS market. More suitable for DINKS would be Quirky and Timeless to express the same sentiments (but Quirky would be a turn off for older couples!).

Logo Strapline

Faversham uses commercially the strapline 'Faversham, Market Town of Kings'. This, however, does not now reflect the diversity of the tourism offer in the area and the current brand positioning as discussed previously.

To accurately communicate the emerging and motivating positioning of the destination, the logo needs to incorporate specifically the countryside, green and rural offers. To achieve this the logo needs to be used with a new strapline. The area is a microcosm of all that is best in Kent (countryside, history, coast, etc.), and the Kent brand is a strong motivator for short breaks by our target markets. Initial work has been undertaken on this and proposals should be developed and adopted early in the new strategy period.

5.2 Promotional Activities

Trends in the tourism market clearly show that there is ever increasing use of the internet by consumers to research and purchase tourism products, and by destinations to target potential visitors – and that people are increasingly booking leisure breaks and holidays at the last minute.

Online marketing is the fastest growing sector of the promotional market and all Faversham's target markets (Empty Nesters, Wealthy Retired Couples and DINKS) are now avid Internet users. The majority of holidays and short breaks are now booked online and web-based travel information gathered to aid the selection process. The proportion of UK households with Internet access has now risen to circa. 70% and this figure is forecast to increase substantially over the next five years.

Online marketing is also good for destination managers as it is targeted, flexible and cost effective, and has the added advantage of being measurable in terms of its effectiveness in generating leisure visits coupled with an agility, pro-activeness and cost-effectiveness that cannot be achieved through more conventional forms of offline (print-based) marketing.

Online marketing should hence be **the** key medium for promoting the Faversham area's tourism offer over the next five years – driving its target markets to the Faversham website and social networking sites set up for the Faversham area.

Whilst it is not the remit of this framework document to develop the area's five-year marketing plan (but this will need developing), key elements of the promotional mix over the next five years should include:

5.2.1 Faversham Website

The key piece of marketing collateral for the Faversham area in promoting itself over the next five years will be the Faversham website. To promote itself effectively to its target visitor markets and to stimulate overnight visits all year round, the visitor aspects of the site will need to be redesigned.

The visitor pages currently sit within the body of the Faversham.org website and these pages have naturally evolved and expanded over time. Whilst these pages have been fit for purpose to this point, to move forward in attracting new visitors in significant numbers requires a major overhaul of the visitor section. It has evolved over the years to such a degree where the site is now in places unwieldy and it is difficult to access information quickly (in less than three clicks). Furthermore, it is predominantly information giving in its design and format. Today's more discerning and enlightened consumers require interactivity (e.g. bookability and keyword searches) and successful destinations need their websites to now work as a tactical marketing tool to stimulate action by the prospect (i.e. book accommodation, download an e-guide, sign up for seasonal newsletters, provide feedback on products etc.), as opposed to solely being an information-giving tool.

A redesign of the visitor information will also allow for tailored marketing to meet the needs of Faversham's different target markets, e.g. older couples and younger 'trendy' DINKS.

It is proposed that the area's visitor information be separated from the faversham.org community data and be branded as **visitfaversham.org** to take advantage of the growing, successful Visit Kent and Visit Britain online brands. This branding will also make clear that Faversham is a tourism destination - a place to be visited. The data can be linked to from the community data, but should have its own independent landing page and brand positioning. It should incorporate technology to provide an online accommodation booking facility and searchable attractions, special offers and food and drink outlets. This should be a key development priority for Faversham in the short-term future.

5.2.2 Google AdWords

Recent research has shown that 73% of all online transactions begin with a search engine. Being in the right place on the search engine results pages, at the right time, is hence crucial. In June 2010 Google's UK market share was an impressive 91.7%, continuing its domination of the search engine market. Monthly investment in a Google AdWords campaign is hence recommended as an important aspect of the area's marketing mix – directing people to the area's redesigned visitor website.

Google AdWords is an important way to augment search engine optimisation and provides the flexibility to experiment with new search keywords utilised by Faversham's target markets.

Google AdWords also now allows advertisers to target by demographic and geographic profile and hence campaigns can be set up to target Faversham's specific visitor markets by age group, geography (e.g. Home Counties) and socio-economic class (A, B, C1, etc.).

5.2.3 Search Engine Optimisation

In tandem with employing Google AdWords it is critical to look at natural search engine optimisation (SEO). 'Natural listings' are important to many consumers and it is hence vital that the Faversham visitor website is optimised in the key search engines for keywords that its target markets search on to find information on short breaks and holidays in Kent. These keywords will need to be researched and confirmed. The aim of this activity will be to get the Faversham website listed on the first page of the main search engines for as great a number of appropriate key word searches as possible.

5.2.4 Social Networking

Online social networks present an efficient and low-cost platform to spread **tactical promotional messages** about the Faversham tourism offer, i.e. special offers, new products, seasonal offerings, hence motivating people to visit for the first time or to return for a repeat visit. In addition, they are a great tool for getting thousands of potential visitors to view the Faversham visitor web pages.

Social networking is one of the most effective, emerging, marketing channels, and is not a passing trend, but one forecast to grow rapidly over the next decade amongst all age groups. The most popular platforms include:

- Facebook
- Twitter
- LinkedIn
- My Space
- Flickr (for photo sharing)
- YouTube (for video sharing)

It is recommended that stakeholders responsible for marketing the Faversham area undertake training to understand how to market the area's tourism offer effectively through these various channels and to set up social network sites for "Visit Faversham" accordingly. To be successful in the use of social media there will be a need to devote resource to coordinating efforts in this area on an on-going basis.

5.2.5 Customer Relationship Marketing (CRM)

An on-going relationship needs to be developed with consumers who have expressed an interest in learning more about leisure travel to the Faversham area if they are to be attracted for a first visit, or to visit more frequently, and out of the main season.

This can be achieved through the distribution of seasonal **e-newsletters** that tactically promote the area to stimulate visits (i.e. promote the changes in the tourism offer through the seasons, special seasonal offers, seasonal food and drink, seasonal events and festivals etc.) to prospects that have signed up to receive these, e.g. FEP's database of email prospects who have signed up via the Faversham website.

Constant Contact (www.constantcontact.com) is a low-cost online email marketing resource that allows e-newsletters to be designed and distributed in-house and contact databases managed effectively.

5.2.6 PR

Continuing targeted PR activity will be important in raising the profile of the area and communicating its brand positioning and personality, along with repositioning the area as a short breaks and longer holiday destination. This PR activity needs to be conducted at a national and regional (London and Home Counties) level, as opposed to at a local Kent level, if it is to be successful in attracting staying visitors as opposed to day trips.

5.2.7 Piggyback Partner Marketing Activity

To achieve economies of scale and to increase its reach, Faversham should look to piggyback on the marketing activities of organisations that promote themselves to the same visitor markets and that share the same brand values. These include Visit Kent, Explore Kent, Kent Downs AONB, Canterbury and Whitstable, Shepherd Neame, Brogdale, Produced in Kent, Mount Ephraim and other local attractions and businesses.

5.2.8 Faversham Area Guide

There is a significant, and increasing, reduction in tourism (and other) marketing emphasis away from printed tourism publications such as Area Guides towards online media. This is because of their relatively ineffective impact. For example, in the recent tourism survey only 5% of respondents had heard about the area through the Faversham Area Guide. Despite this, many destinations still print and distribute Area Guides, resulting in an ineffective use of resources and funding.

The printing of the Faversham Area Guide should be substantially reduced over the next few years as tourism stakeholders become more knowledgeable and confident implementing online marketing strategies. In the short-term, only limited budget should be allocated to this activity, restricting the print run and distribution to the local Faversham area only (letterbox drop and

Faversham Visitor Centre holding for example). This will service the growing VFR (Visiting Friends and Relatives) market well, along with the local market. The significant cost-savings made by this change should be re-directed to online marketing activity.

The area guide should be published on-line on the “Visit Faversham” (and partners) websites as a ‘page-turn’ e-guide. This will provide the flexibility to produce different e-guides targeted at the older couples and the DINKS market separately, as each requires a different tone of voice and product emphasis as discussed previously.

There is only a secondary requirement to produce this e-guide in different languages as our priority target markets are domestic and will remain so over the next five years.

5.3 Market Research

Detailed volume and value data is not yet available for the Faversham area.

FEP recently commissioned visitor research which was vital in understanding its current and future consumer markets – their profiles, motivations for visiting the area, satisfaction with their visit and future development needs. The tourism industry is a dynamic industry and one where the needs and aspirations of consumers change over time. Hence the regular collecting of information on its consumer markets and their satisfaction with their visit, etc., is key to the future successful marketing and development of the area for tourism. A programme of market research is hence strongly advised, to include:

- An online Visitor Survey on a three yearly cycle (next 2013).
- Accommodation Survey – to assess occupancy levels, tourism volume and value. This can be achieved through encouraging all accommodation providers in the area to participate in Tourism South East’s monthly accommodation survey.
- Economic Impact Assessment - to evaluate the volume and value of tourism to the Faversham area. Commission Tourism South East to conduct a Cambridge Economic Model for the area. This will necessitate drawing on the recent Cambridge Models conducted for Swale Borough Council and Kent Tourism (based on 2006 tourism data), TSE’s accommodation survey and Faversham’s own 2010 visitor survey. Assessment should ideally be repeated on a three yearly cycle.
- Faversham Area Business Barometer – to assess the health of Faversham’s tourism industry on a monthly basis during the peak tourism months (April-September). Barometer to provide a regular ‘finger on the pulse’ assessment of the health of the tourism industry in the area. A selection of tourism businesses to be surveyed (by phone or email) monthly.

6. Product Development

The Faversham area has made significant investment in its tourism product over the past five years to enhance its destination appeal. Recent developments in line with the area's brand positioning include:

- 4 new themes circular walks and associated marketing collateral (4 additional circular walks are currently being developed, along with the positioning of all 8 walks as food trails)
- Enhanced townscape
- New food and drink outlets
- Expansion of the gastro pub offer
- Creek Creative art and design studio
- Maintenance of the independent retailer sector

To grow its tourism industry further, the area needs to continually strive to improve the quality of its products and services. It also needs investment in new product developments that enhance the appeal of the area for short break and longer holiday takers within its target markets, particularly for the DINKS market.

Destinations like Faversham that rely on their quality reputation need to maintain and improve quality standards to help protect and enhance their destination brands. Visitor economy 'software', such as events and customer service, assume greater importance in such circumstances. It is hence important to continue to invest in the training and upskilling of visitor facility and other providers and in the area's annual major events programme.

Town and Country destinations such as Faversham have excellent potential for further, selective rural development. Research shows that both Kent and Faversham's countryside is a main motivator for visits. Faversham has already taken great strides to develop its rural offering with the development and marketing of eight circular themed walks linked to the food and drink offer. Rural tourism development priorities need to be agreed for the next five years to build on this success and to cement its reputation as an area for walking, cycling and other green tourism activities.

Factors to be considered include:

- The majority of visits to the countryside are made by car.
- The challenge of visitor management at popular countryside sites, e.g. Oare Marshes Nature Reserve.
- Local communities may not always embrace the prospect of additional tourism.
- Encouraging tourism in the countryside can have negative repercussions – increased traffic on country roads, litter, inappropriate behaviour and an impact on local wildlife, etc.

- Visitor expenditure helps to support rural businesses and facilities and provide employment for local people.

The aim should always be to enhance and protect – not detract and damage. This approach hence favours, smaller, sustainable developments that are in harmony with the rural environment e.g. the Faversham area's circular walks product, ecolodge self-catering accommodation developments etc.

6.1 Accommodation

The following trend and market potential information has been obtained from Locate In Kent's Hotel Development Strategy along with Kent Tourism's Development Strategy and Tourism South East research. It is useful background that can be used to agree Faversham's approach to its accommodation stock development into the future.

Small serviced accommodation provision in Kent is reducing. This long-term decline in Kent's stock of B&Bs and guesthouses is thought to have occurred for a number of reasons:

- Reduced demand in coastal resorts, which previously sustained a healthy, albeit largely seasonal stock of such properties.
- Given general increases in personal wealth, there is less need for house owners to supplement their income through providing guest accommodation.
- Competition from new types of accommodation, such as roadside lodges, which offer the benefits of convenience and standardisation.
- The impact of the adherence by tourism organisations and destinations to the need for quality assessment and associated perceptions of the red tape involved in providing guest accommodation.

FATA reports that the stock of guesthouse and B&B accommodation locally has remained static over recent years, with some facilities closing and new ones starting up. With a tourism growth strategy being currently adopted by the destination for overnight stays, it is not unreasonable to predict, however, that in the short-term future a shortage of accommodation in the area will limit its growth potential, particularly at peak times.

Research commissioned by Tourism South East has identified a wide range of opportunity for additional accommodation investment across the region. The past 10 years has seen an unprecedented level of new investment in a wide range of hotel products from budget to 5 star luxury hotels, including new leading-edge products such as boutique hotels. All the main UK brands are represented in the region and new entrants to the UK are targeting the South East to be part of their first phase investments, bringing them profile and exposure in key markets.

The 'hot spots' identified by the TSE research and type and standard of accommodation that may be appropriate to the Faversham area are summarised below. It is important, however, to grow market demand for accommodation in the Faversham area by attracting short break and longer holiday takers, rather than simply spreading current demand levels across a greater number of suppliers.

Boutique Hotels / Country House Hotels

Research by TSE and Locate In Kent's Hotel Development Strategy shows there is potential for the development of small 3 star hotels operated by independent operators in the Kent East area (one of Locate in Kent's specified hotel accommodation development areas). Iconic, fashionable serviced accommodation such as boutique or contemporary town house development could be one way of meeting this demand in destinations of character and of appeal to affluent niche markets e.g. where there is a focus on food or the arts. This points to there being potential scope for a small boutique hotel developed by local entrepreneurs in the Faversham area – the sort that would feature in independent guide books and help to attract overnight stay business in its own right. Read's Restaurant with Rooms is an example of such a hotel, and a new one located in the heart of the historic town of Faversham could be a big draw for the DINKS market to the destination.

The TSE and Locate in Kent research also show strong performance of the health spa and adult only hotel products in the South East and the absence of such products in Kent East suggest there could be potential for their development, given suitable properties. Combined within the boutique hotel product aspired to above, this would give a major boost to the Faversham overnight stay tourism market and begin the process of reinventing the destination away from being attractive only to older, affluent couples, but a destination for younger (DINKS), affluent couples also.

The same research reports that there could also be scope for further small luxury or 3 star country house hotel in rural areas of the county along with quality guest houses/ B&Bs in character, rural properties.

Quality Pub Hotels and Country Inns

The new breed of contemporary stylish pub accommodation combined with a distinctive food and drink offer, often in character properties, is performing well where developed to date in Kent East, and they bring diversity to the tourism offer (TSE, Locate in Kent research). Potential has been identified for bedroom additions to rural pubs and character pubs in market towns across the Kent East area.

Self-Catering Accommodation, Caravan and Camping Sites

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

Self-catering properties in general have adapted over time, and those that haven't need to, to also offer short breaks in addition to one week or longer lets and continue to be an important element of the visitor accommodation mix. Self-catering visitors tend to stay longer and to use local shops, pubs and restaurants, as well as visiting local attractions. Such visitors are particularly important in rural areas.

Hoseasons, a major national player in the self-catering sector, has indicated to Locate in Kent that there is frustrated demand for medium-scale, quality lodge-style developments in rural areas of Kent. There can be challenges regarding planning permission for such developments, but if overcome this would indicate an opportunity for public and private sector partners to pursue such a development and to the need to look at ways of providing advice and support to land and property owners in rural areas of Faversham to achieve this.

Although demand for touring caravan and camping accommodation is much more seasonal and weather dependent than serviced and self-catering accommodation, it exhibits similar characteristics to self-catering properties in that such visitors tend to stay longer and spend locally. Over the last few years this market has seen resurgence, which is a trend that is likely to continue in the current economic climate. There is an opportunity to work with current caravan and camping site providers in the Faversham area to investigate market trends and understand supply and demand issues within the area. The Caravan Club has previously indicated to Locate in Kent an interest in looking at adding to their sites portfolio in Kent. This would indicate merit in looking at further development potential for this in the Faversham area as part of a sector study.

6.2 Attractions

Faversham's visitor attractions are a key element in making the area unique and distinctive. However, the recent tourism research work indicates that the strongest associations with the area as a potential visitor destination are the historical market town of Faversham, attractive countryside and villages, promoted walking routes, the food and drink offer, historic houses and gardens, combined with a warm welcome from locals.

Visitor attractions should therefore not only be considered as the conventional stand-alone, paid for entry sites or buildings. Attractions can take many forms. Some are time limited, some are of seasonal interest while others have year round appeal. In the recent tourism survey work conducted for the Faversham area, visitors cited the following seven visitor attractions as the ones they had visited most often when on a visit to the Faversham area:

1. Brogdale National Fruit Collections
2. Mount Ephraim
3. Oare Marshes Nature Reserve
4. Shepherd Neame Brewery Tours

5. Macknade Fine Foods
6. Farming World
7. Standard Quay

These need to take precedence in future marketing communications, as they are the most motivating for our target markets, and reflect different aspects of the brand positioning.

Other important (not conventionally thought of as visitor attractions) assets that the tourism research has shown are the KEY motivators for visits to the Faversham area are:

- Faversham's quality townscape with independent, quality places to visit, eat, drink and shop.
- The area's unique and diverse landscapes – the Kent Downs, Oare Marshes, the creeks, The Swale.
- The walking product (particularly those circular walks that link town and country and take in the creeks and estuary landscapes).
- Places to stay or eat that are attractions in their own right such as Read's, the Dove at Dargate and the Sportsman.
- The annual Hop Festival.

An analysis by Visit Kent of Kent's attractions indicates that those based in Kent's inland towns and countryside attract the greatest proportion of visitors (56%). This again emphasises the importance of the countryside as a key attraction for visitors to the Faversham area. The surrounding countryside attracts walkers, cyclists and bird watchers as well as people who just want to enjoy the scenery and rural villages and pubs. The area has an extensive public rights of way network and this is undoubtedly a major asset and offers further potential for promotion and development of the walks product offering and also the development of cycling trails.

6.3 Festivals

Faversham should continue to develop and market its diverse range of local festivals, including the flagship annual Hop Festival. New festivals should also be researched and developed in line with the area's updated brand positioning including an annual walks festival (linking into Explore Kent's annual Walking Festival) and an annual themed food and drink festival.

6.4 Culture and Creativity

There is a significant growth in cultural tourism⁶ reflected by increased attendances at cultural events in the UK. The regeneration work on Kent's coast has a strong cultural focus. The first Folkestone Triennial was held in summer 2008. This ambitious international visual art project saw artworks by some of the world's leading contemporary artists displayed at key points around the town, in the surrounding countryside and along the coast. A report for Visit Kent by Locum Destination Consulting reports that a cultural festival cluster in East Kent is forming around this and other key events such as the Hop Festival, Whitstable Biennial, Broadstairs Folk Week and Canterbury Festival as well as the exhibitions and events programme staged by Turner Contemporary. Between them these events attract tens of thousands of visitors each year.

Faversham has a wealth of local creative talents, including Creek Creative, which could be harnessed within this vision and which would add a new dimension to its tourism offer and further strengthen its local distinctiveness and appeal.

6.5 Transport and Access

Accessibility has an important part to play in destination development, perhaps more than ever given the current situation in respect of oil and fuel prices. Faversham has the advantage of being relatively easily accessible by road and by rail from the key visitor markets of London and the rest of the southeast. Many of its rural areas can also be reached by train. However travel times by train to some parts of the area, e.g. Teynham/Conyer, are poor and non-rail information provision at stations and connectivity with other bus and taxi services can be lacking.

The M25, M20 and A2/M2 corridors provide good road access to the area although congestion is occasionally a problem, as are perceptions by some of the M25 being a barrier and the negative impacts when Operation Stack is in operation. This was reflected in the recent tourism survey work. The great majority of people, however, see the M25 access into the county as a major advantage.

6.6 Green Credentials

In the recent tourism survey over two thirds of respondents (69%) said they would prefer to use a green tourism supplier e.g. environmentally friendly accommodation, restaurants/cafes that use local produce, businesses with green tourism awards, etc. Consumers are becoming increasingly

⁶ From Wikipedia - **Cultural tourism** is a subset of tourism concerned with a country or region's culture, specifically the lifestyle of the people in those geographical areas, the history of those peoples, their art, architecture, religion(s), and other elements that helped shape their way of life. Cultural tourism includes tourism in urban areas, particularly historic or large cities and their cultural facilities such as museums and theatres. It can also include tourism in rural areas showcasing the traditions of indigenous cultural communities (i.e. festivals, rituals), and their values and lifestyle. It is generally agreed that cultural tourists spend substantially more than standard tourists do.

aware and concerned with green issues and it is important that the Faversham area continues its drive to become a green destination i.e. Green Tourism Business Awards, Fair Trade, use of local produce etc. This will further add to the area's distinctiveness.

6.7 Product Development

Many product development needs and opportunities have been articulated in section 6 above. Key ones that can be considered to maintain and enhance the competitiveness of the Faversham area over the next five years are summarised below. It is recommended that these core factors are held at the centre of work to increase tourism volume and value over the next five years.

- Enhancing the quality and customer service of existing accommodation stock (Walkers & Cyclists Welcome accreditation, Green Tourism Business Awards, Welcome Host Training, etc.).
- Increase the number of existing serviced accommodations with 4 star ratings and Gold and Silver awards.
- Increase local distinctiveness, e.g. the use and promotion of local produce and Kentish dishes in restaurants, cafes and pubs, particularly through improving the linkages between local producers/growers and food and drink outlets.
- Enhancement of existing festivals and development of new festivals (specifically walking, arts, food and drink) so that a year round festival programme can be promoted.
- Development of both cycling product, utilising the many miles of quiet, attractive country lanes in the area, and birding product (i.e. for birding have Oare Marshes, Swale Nature Reserve, Conyer old brickworks site) to grow the range of green tourism activities available in the area. The area's most motivating natural landscape is that linked to the creeks and estuary (recent Faversham tourism survey).
- Development of the creek side tourism product (eateries, independent arts and crafts retail outlets) and improving linkages of this with the town centre. Improve the waterway so there is increased movement of boats to prevent it being just a 'static' attraction. Potential for private sector to open a 'show' barge as a visitor attraction.
- If physically feasible, increase town centre car parking capacity; introduce out of town 'Park and Ride' scheme for major festivals (use of Abbey School field and local coach operator for example).
- Extend opening hours of town centre retail and food and drink outlets. Variety to be open up to 6pm and on Sundays.
- Develop the night time economy in the town centre (food and drink) so it is livelier and has greater atmosphere in the evenings.

- Continue development of Shepherd Neame Brewery Tours as a major visitor attraction in the town centre – with consideration of the flexibility for visitors to ‘pay and go’ as opposed to booking ahead.
- Faversham Visitor Information Centre. To reinvent itself as a retail outlet for walkers.
- Country house 3-star hotel development.
- Bedroom additions to rural pubs and character pubs in town.

And specifically to increase attractiveness of the destination for the DINKS market:

- Promotion of cycling routes, similar to the walks product.
- Build on gastro pub offering.
- Rural, self-catering, eco-lodge accommodation development (upmarket ‘Centre Parks’ for adults) with links to walking, cycling and birding product along with rural food and drink offer.
- Town centre boutique hotel.
- Expansion of network of independent, arts and crafts retail outlets in town centre.
- Creative Faversham product development i.e. taster workshops where creative tourists can learn from local artists how to cook, how to make cheese, how to make jewellery, how to paint, etc.

7. Consultation

It is envisioned that this framework for tourism development over the 2011 – 2016 period will be put out to consultation with local tourism stakeholders with the intention that the branding, promotion, research and development themes and proposals identified will be adopted to form a template to which all interested parties can work to over the next five years.