# Thanet Visitor Research 2018: Secondary Research Report

April 2019

# Contents




*Report prepared for Visit Thanet and Thanet District Council*

# Aim and Background

**Project Aim:**

This research project aims to measure the changes in visitor numbers, visitor motivations and visitor profiles in Thanet since the last face-to-face visitor survey that was carried out in 2010. It also aims to assess the impact of the previous DMP activities, as well as highlighting the extent to which the Thanet DMP targets have been met. The project was divided into two research tasks, in order to meet the project aims.

**Research stages:**

1. Desk research and knowledge gathering stage
2. Face-to-face visitor surveys, undertaken by interviewers

**Report Aim:**

The aim of the secondary research report is to support the findings of the primary research undertaken as part of the project, by interpreting key national and regional research sources. The report will firstly look to unpick relevant key trends, focusing on the future visitor journey, to give a wider context on the tourism landscape and the importance of changing consumer needs and behaviour. Following this, the report will look at the subsequent key areas, with the aim to further aid planning and development decisions within the destination, while also allowing evaluation and links to be made to key outputs set out in the Thanet DMP.

- Volume and Value of Tourism
- Visitor Segmentation
- Activities and Tourist Motivations
- Visitor Satisfaction
- Perceptions and Awareness of destinations
- Challenges and Opportunities

# Key trends

- The Tourism industry in England has seen significant growth, with record tourist spending reported in recent years from both domestic and international markets. The sector not only contributes substantially to the visitor economy but also in terms of employment and job development, and has significant potential for future growth both nationally and regionally (VisitEngland, 2017).

- A report published by VisitEngland (2017) *'The Future Travel Journey',* looks to outline the key trends for tourism product development and how their success is strongly dependent upon current and future consumer needs and behaviour. The report identifies trends that are not only relevant today, but which will have a considerable impact on consumer attitudes and decision-making surrounding the travel journey over the coming decade.[1]

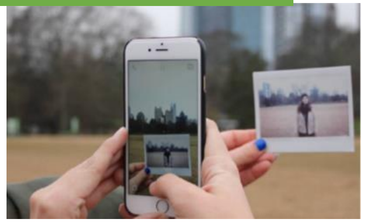
- As outlined in the report, the demographics of the consumer landscape are rapidly changing, as markets become ageing societies. Consumers are living longer and more active lifestyles, thus breaking the mould in terms of the order of key life stages. Subsequently, it is becoming more apparent to move away from segmenting visitors by age only, but more according to their interests and motivations as travellers.

- The following four trends outlined on the right offer a valuable insight into the changing tourism landscape and should be used to inform future tourism product development and destination strategy.[1]

### *'The Filter Bubble'*

One of the key trends focuses on the concept of the 'The Filter Bubble'. With travellers having access to a vast range of sources to influence and inspire travel, there is an increasing level of personalisation of content, restricting the range of information available to them. In order for tourism products to appear in the algorithm results, they need to ensure they are part of the consumer conversation and be clear on which markets and niches they would like to target.[1]

### *'Performance Perfection'*



Consumers in today's society are social media conscious and frequently strive to portray an ideal self-image using their social media profiles, in a desire to earn social status. On this premise, travellers will be selective in their choice of tourism products and will seek products that are both aspirational and will increase their social capital. With this in mind, consumers will seek out destinations with photo and video opportunities to curate the perfect holiday or day out posts to share.[1]

### *'The Pursuit of Real'*

Another major theme focuses on authenticity, with travellers seeking to experience a destination like a local and abandon the 'tourist' label, known as 'Impulsive Existence', with travellers preferring to book products once they are at the destination.[1]

### *'The Leisure Upgrade'*


The final key trends are 'The Leisure Upgrade' and 'Mastering the Mind'. The former is all about how future travellers will seek out and favour tourism experiences which combine fun with opportunity for learning or self-improvement. The latter, centres on future travellers being highly aware of the pressures of modern life and will seek products and experiences that promote or allow for relaxation.[1]

# Volume and Value

In order to place the performance of the visitor economy in the Isle of Thanet within the wider national context, growth in volume and value nationally and regionally can be examined and used as a benchmark against local level data. In 2017, tourism in England contributed £106bn to the British economy, supporting 2.6 million jobs (VisitEngland, 2017).[2]

**National: Overnight trips**

- Looking at the contribution of **domestic tourism**, UK residents spent just over 100 million overnight trips in England in 2017, generating a total expenditure of £19 billion, with an average length of stay of 3 nights. Furthermore, when looking at growth, domestic trips saw a -2% decrease compared to figures seen in 2015 and a -2.7% decrease in value (VisitEngland, 2017).[2] When breaking these trips down by purpose, 47.2 million holiday trips were taken in England during 2017, +8% higher compared to 2015, with short breaks consisting of 1-3 nights accounting for two-thirds of holidays (VisitEngland, 2017).[2]

- Similarly, **overseas visits** contributed significantly to the economy, with a total of 34.3 million visits to England in 2017, a +4% increase when compared to 2016. In addition, international visitors brought £21.4 billion in value during 2017, a record year for inbound tourist spending and a +9% increase compared with the previous year (VisitBritain, 2018). [3]

- Again, when looking at figures by purpose of visit, data for this was only available for visits to the UK. Findings show that holiday visits to the UK by overseas visitors rose +11% to 15.4 million in 2017, with spending experiencing a significant increase (+22%) compared to 2016 (VisitBritain, 2018). [3] Alongside holiday visits, trips for VFR purposes increased by +4% in 2017 to a record 12 million, with the value of these trips seeing an increase of 15% to £5.8 billion. In terms of inbound markets, VisitBritain figures show the largest number of overseas visitors were from France, the USA and Germany (VisitBritain, 2018).[3]

- On a regional scale, the South East saw 5.3 million visits from inbound markets, +2% increase, generating a £2.1 billion spend. Although volume saw a healthy increase, spending saw a -3% decrease, however with the exception of London, the South East region received the highest number of visitors.[7]


Credit: Valerie Cameron

## Day trips

- In addition to overnight visits, the day trip market also brings substantial value to the economy. In England, the domestic day trip market brought £50.9 million in value, consisting of 1.5 billion trips in 2017. However, trip expenditure saw a decrease of -4.7% in comparison to figures seen in 2015, while the volume of day trips saw an increase of 0.8% (VisitEngland, 2017).[2]
- In terms of inbound markets, according to questions added to the VisitBritain IPS Survey (2016) overseas visitors took a total of 11.9 million day trips while staying in the UK.[10]
- Regionally, in 2017, 232 million domestic day trips were taken in the South East of England, generating £7,068 million in value.[8] Furthermore, other than London, the South East region received the highest number of domestic day trips, compared to other UK regions.[8] This popularity of the South East region is also mirrored through the number of overseas day trips, with 1.2 million trips taken to the region.[10]

## Coastal areas

- According to a report published by The National Coastal Tourism Academy (NCTA) in 2016, domestic and day trip tourism to coastal areas is valued at £8 billion to the English economy, accounting for 31% of domestic overnight holiday trips and 8% of tourism day visits.[4] Looking at international visitors, 15% visit the English coast, bringing a value of £972 million to the economy.[4]
- According to an annual report published by VisitBritain (2017) looking at trips taken by domestic visitors, 23.4 million trips were taken to coastal destinations, coming second to city/large town destinations (42.6 million).[6] Furthermore, one of the biggest obstacles faced by coastal destinations is that less than a third of all trips to England involve a stay outside of London, with the challenge being to persuade visitors to travel beyond the capital, to coastal areas.[5] The report published by NTCA also concluded that coastal tourism is undervalued and has significant growth potential.[4]


© Alex Hare


Credit: Thanet District Council

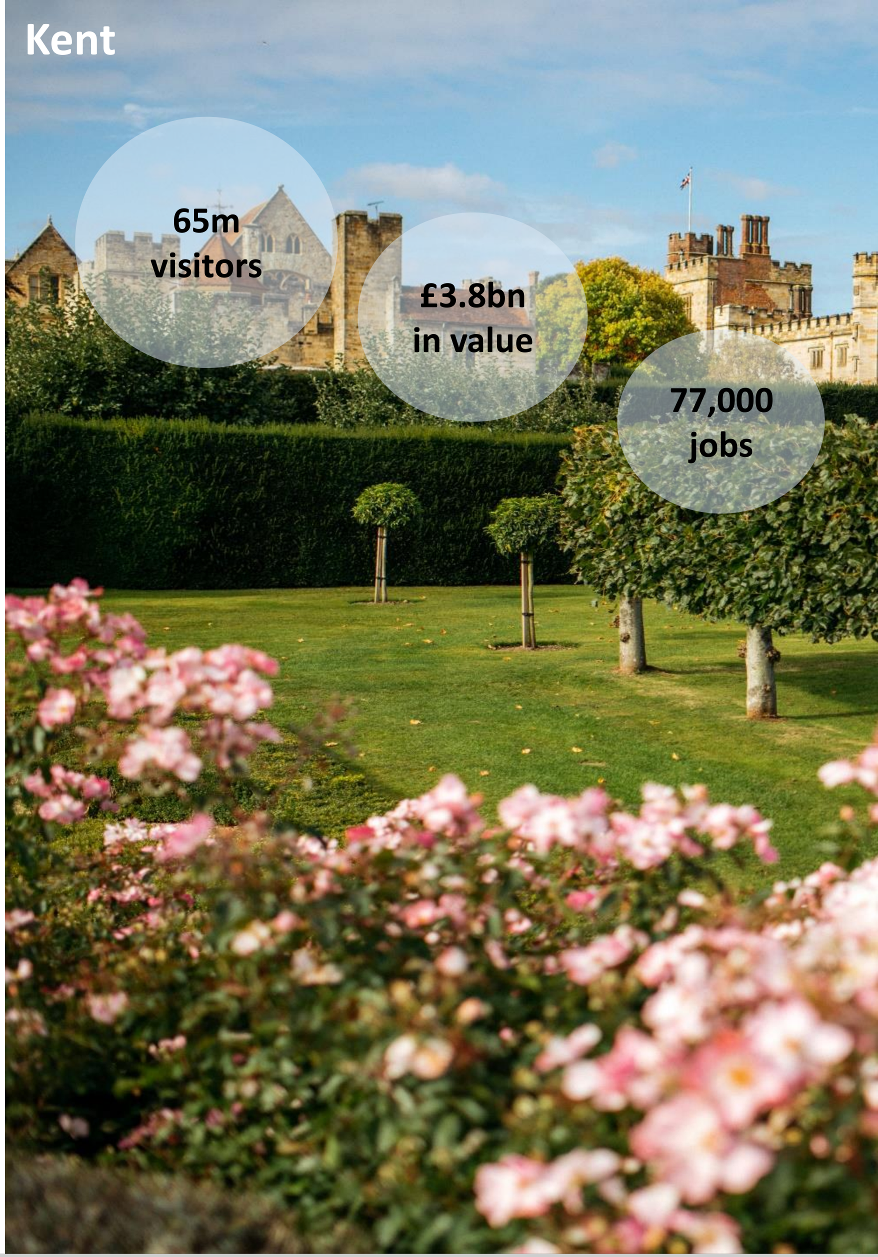
## Kent

- Based on figures from the 2017 Economic Impact Cambridge Model, Kent received 65 million visitors, seeing a +7.2% increase compared to figures seen in 2015[11]. This activity brought a total of £3.86 billion in value to the Kent visitor economy and supported 77,000 jobs. Looking at the growth compared to 2015, Kent saw an increase of +7% in value, with jobs supported by tourism seeing a +6.8% increase, compared to 2015.[11]

- Looking at the breakdown of overnight and day trips, Kent saw 60.1 million day trips in 2017, an increase of +7.8% compared to 2015. The number of overnight visits were on par with figures seen in 2015 (-0.3%), with the county seeing 4.9 million overnight trips. When looking at value, day trips contributed over £2 billion to the Kent visitor economy, a +8.7% increase compared to 2015. In addition, the research showed that overnight trips contributed £928 million to the economy, a +3% increase. [11]

- The average length of stay for overnight trips was 3.66 nights, a 2.2% increase compared to 2015. Furthermore, while visiting the county, overnight visitors spent on average £190.57, a +3.3% increase on 2015. Looking at spend per day trip, visitors average spend was £33.89, which grew by +0.8% compared to 2015. [11]

- In addition to the county-wide Cambridge Model Research, a study aiming to measure the impacts of HS1 on Kent's visitor economy was also conducted in 2017. Results show that leisure journeys to Kent via HS1 have increased almost nine-fold since 2010, generating over £311 million in value and supporting 5,766 jobs, between 2010 and 2016. [12]



## Isle of Thanet

- According to the Thanet Cambridge Model Research, in 2017 Thanet received over 4.2 million visitors, an increase of +8.6% compared to 2015. In terms of value, tourism in Thanet is worth £319 million – an +9.2% increase, and it supports 7,950 jobs (up +8.7%).[13]

- Looking at the breakdown of overnight and day trips in 2017, Thanet saw 493,000 overnight visitors, on par with figures seen in 2015. Furthermore, these trips generated a value of £124 million, which saw a +2.0% increase. In addition, when looking at the origin of overnight visitors to Thanet, 345,000 were domestic and 148,000 were from overseas. [13]

- Day trips accounted for 3.7 million of the total visitors received, an impressive +9.9% increase, which subsequently brought in a total value of over £136 million, a +14.2% increase compared to 2015.[13]

- The average length of stay for overnight trips was 4.38 nights, a +5.1% increase compared to 2015. Furthermore, the average spend per overnight trip was £252.57, a +2.2% increase. Looking at spend per day trip, visitors spent on average £36.61, seeing a 3.9% increase in growth compared to 2015. [13]

- When assessing the performance of volume and value in Thanet and in Kent, Thanet displays a higher rate of growth in comparison to the county wide results. Similarly Thanet displays a higher rate of growth for the volume of day trips.

**Rate of growth in the Isle of Thanet vs. Kent**

| | Volume | Value | Day trips |
|---|---|---|---|
| Isle of Thanet | +8.6% | +9.2% | +9.9% |
| Kent | +7.2% | +7% | +7.8% |

- Looking at spend per overnight trip, visitors to Thanet spent on average £61.84 more than in Kent.

- Looking at growth on a national level, Thanet's performance was on trend for domestic overnight visits, with both seeing a decrease of -2%. Looking at inbound overnight visits, Thanet also saw a similar rate of growth compared to figures for England, with the district registering a growth of +3%, compared to the +4% increase nationally.*

- Nationally, the volume of day trips saw a +0.8% increase between 2015 and 2017 in England, whereas locally the Isle of Thanet saw a +10% increase across the same period.**

- Furthermore, taking these figures into consideration it is possible to examine some of the aims set out in the Thanet DMP. One of which was to increase visitor numbers and spend, and is therefore clear that these aims have been achieved, with both areas experiencing growth. Although the volume of overnight trips saw a slight decrease, the value of these trips saw an increase, which could potentially be result of the area attracting higher spending visitors. [12]

- There is a perception that English seaside areas are in decline. This this viewpoint needs to be challenged as coastal areas have significant growth potential,[4] and Thanet's growth is testament to this.

*Inbound performance for England is the growth percentage between 2016-2017, whereas locally, the growth is assessed between 2015-2017.
**Day trip figures for England are taken from the results of the 2017 GB Day Visits Survey and figures for the Isle of Thanet are based on a combination of results from the GB Day visits survey, admissions data from the visits to visitor attractions survey, the ALVA survey and visitor numbers from the Visit Kent Business Barometer. Therefore, as sample sizes and surveys differ, direct like for like comparisons cannot be made.


Credit: Thanet District Council

Credit: Thanet Tourism

# Visitor Segmentation

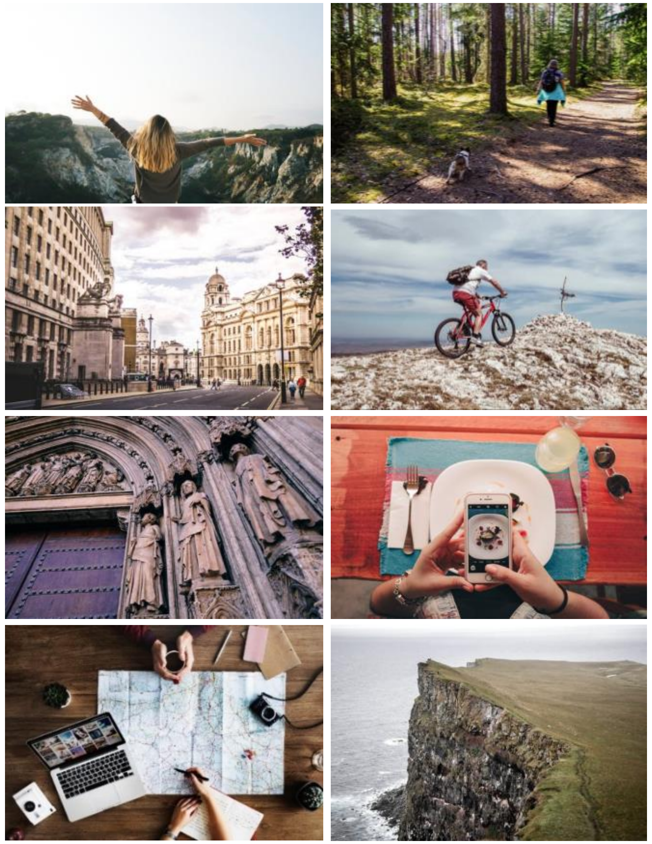
Visitor segmentation is a crucial tool for any destination that wants to be at the forefront of visitors' minds. Segmentation helps to identify the key target markets and the most effective communication channels to reach them, thus raising the appeal of the destination, increasing the volume of visits and the associated expenditure. From the results of the latest Visit Kent Perception study (2017), half of the visitors made their most recent trip to Kent in the last year, with the county remaining the leading destination for recent visitation compared to its neighbouring counties.[17]

- In terms of visitor profile, Kent attracts a younger visitor mix than the GB average. When looking at overnight visits, under 35's are becoming increasing likely to stay for a short break of 1-3 nights, an 8% increase between 2012 and 2017. Looking at day visits, the volume of day visits have increased, primarily among visitors aged 35-44 years, potentially due to their likeliness to travel with children.[17]
- At destination level, Thanet generates significant reasons to visit, driven more strongly by younger respondents in various age brackets under 54 years, as the most likely to visit the area for a day trip.[18] Interest from this demographic is supported by research conducted by VisitEngland (2017), showing that of the visitors to coastal towns the largest proportion (42%) are aged 35-54 years, although this is based on inbound visits only.[26]
- Various research has been undertaken to identify visitor segments, based on factors including attitudes, behaviours, motivations and various demographics. In identifying these segments, they can be utilised by destinations to prioritise and focus marketing activity and product development towards particular audiences.

Credit: Thanet District Council

The next three pages look to summarise the segmentation work conducted by VisitBritain and VisitEngland on international and domestic markets and explore how these insights can be applied to the Isle of Thanet to effectively market the area. The following segments are taken from five pen-portraits produced by VisitBritain (2018) based on segmentation research conducted on key international markets.[28]

## National level



### Buzzseekers

This segment is made up of predominately younger visitors, with 64% aged 18-34 years. In terms of activities, they seek new experiences that the action packed and full of excitement. They are also happy to pay more for one-off experiences and like to visit famous or iconic places. Looking at accommodation preferences, this segment are likely to choose options such as Airbnb, camping or caravanning or other alternative accommodation. With regards to communication channels, this market will look to friends and family for recommendations, alongside looking to trusted or well known social influencers.[28]

### Explorers

Most likely to be aged 55+ years, this segment looks for relaxed holidays surrounded in rural scenery with opportunities for outdoor activities and to sample local food and drink. Looking at accommodation, this market is more likely to look for self-catering properties, and B&Bs. In terms of channels to target this segment, they commonly look to travel agents alongside sourcing inspiration from movies, books and magazines and often travel with one other person.[28]

### Sightseers

These visitors also tend to be aged 55 and over (57%), preferring breaks located in the city and have a strong interest in famous and iconic places, local food and drink, alongside attending specific events. This segment also prefers to stay in larger hotels or inner city B&Bs, looking to websites and travel agents for inspiration and travel deals. They are also likely to travel with one other person.[28]

### Adventurers

The majority of this segment tend to be aged 45 and over, with a strong interest in outdoor activities including walking, cycling and boating. They seek new experiences, taking in the rural scenery and heritage and predominantly stay overnight in B&Bs, travelling with one other person. In terms of sources of inspiration, they look to friends and family for recommendations and ‘all in one’ ideas.[28]

### Culture Buffs

This segment is predominantly made up of a younger demographic and are more likely to travel in medium sized groups, who are image and brand conscious. They seek out destinations which offer quality food and drink, opportunities to visit iconic sites and attraction including, theme parks and wildlife attractions.[28]

Looking at visitor segmentation in a domestic context, in 2016 VisitEngland conducted segmentation research, producing various pen-portraits, exploring the idea that different groups of visitors will have different needs and behaviours when taking a domestic holiday or short-break. The research firstly looked to explore what visitors do during their trips, looking at the different activities and places they visit, alongside visitor demographics, motivations and needs as shown in figure 1 below.[29]

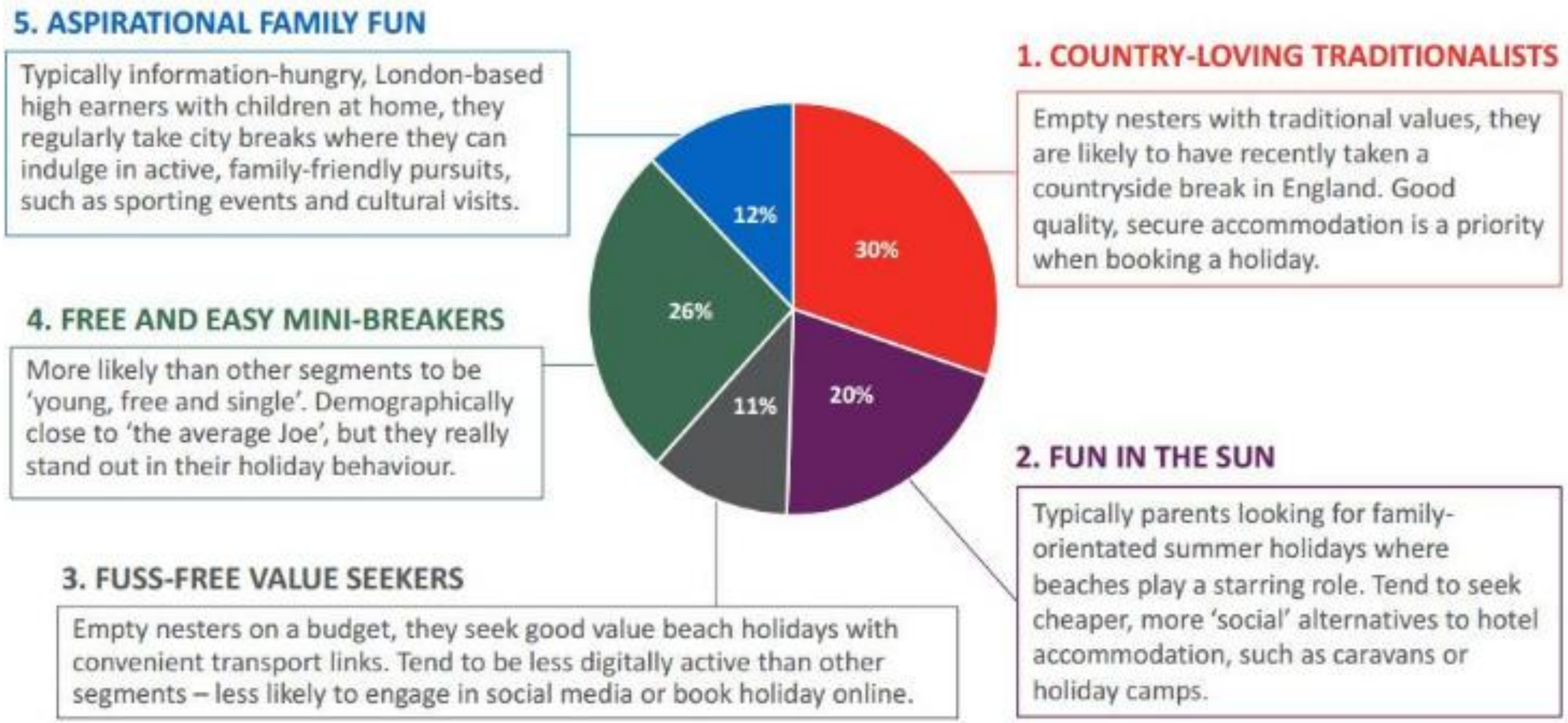



*Figure 1: 5 pen-portraits of domestic visitors* (VisitEngland, 2016)

## Isle of Thanet

- In the context of the Isle of Thanet, there are certainly segments both from an international and domestic perspective that would determine a more effective marketing of the area, with a view to increase the number of overnight trips too. In terms of inbound segments, **‘adventurers’** present an opportunity to market the area’s beautiful scenery and heritage, alongside outdoor activities such as walking and cycling.

- **‘Culture buffs’** also present several opportunities, firstly to capture the younger inbound demographic but also to market quality food and drink, iconic sites and attractions. This could include Ramsgate Harbour’s food and drink and iconic sites such as Dreamland and Turner Contemporary and their links with the upcoming Turner Prize.

- Looking at domestic segments, the Isle of Thanet traditionally offers itself as a destination to **‘fun in the sun’** visitors, with its beautiful beaches and attractions with a family friendly offer.

- In addition, the area could also appeal to **‘fuss-free value seekers’**, who demographically are split between over 65’s and under 25’s. These visitors are budget-focused and look for beach holidays and convenient transport links, which the area has to offer with its strong connectivity and rail infrastructure links.

- Another domestic segment which the area could appeal to is **‘free and easy mini-breakers’**. This segment skews towards younger visitors with no children who have a higher disposable income for short breaks and are more likely than other groups to shop, visit museums, galleries and seek cultural entertainment. This could be presented to them through Margate’s strong cultural offering and range of museums and galleries.

- The final segment which presents an opportunity is **‘aspirational family fun’**. This market is typically London-based, under the age of 50 with children at home and a higher income. As they like to engage in active, family-friendly pursuits, Thanet’s wealth of outdoor activities and watersports would appeal strongly alongside its growing cultural offer.

- The area presents itself as a truly dynamic coastal destination offering a wealth of different experiences, from a traditional seaside image, harbour town, rich in scenery and food and drink, to its appeal for active breaks. It is worth highlighting that different propositions around these segments must be made, rather than a generic message around ‘something for everyone’, which simply does not appeal to the present and future visitor. Furthermore, the segments in blue above are those that should be a main focus when targeting domestic visitors.

Image Credit: Phil Houghton


Image Credit: Rod Edwards

# Activities and Motivations

The activities available in a destination play an increasingly important role in selecting where to visit. Visitors have changed the way they treat a place; when exploring it, they want to be able to immerse themselves and try activities. This section of the report will examine relevant existing research into visitor activities and motivations, nationally, regionally and in the context of the Isle of Thanet.

**National**

- Looking at trips by purpose of visit, in England, 47% of **domestic overnight trips** were for holiday purposes, followed by 36% VFR (VisitEngland, 2017).[2] For **inbound visitors**, 39% visited for holiday purposes, followed by 22% visiting for business (VisitBritain, 2017).[14]
- According to a report published by VisitEngland (2016), looking at the main motivations for **inbound visitors**, sightseeing and experiencing local culture ranked highly, while resting mind or body and coastal/beaches ranked lower. However, it is worth noting that for the latter, England does not benefit from good weather as other destinations do. Popular activities among overseas visitors included sightseeing, shopping and visiting pubs.[16]
- In terms of motivations by region, the South East has a strong heritage draw, with inbound visitors being especially likely to visit castles or historic houses. Outdoor activities also ranked highly, along with areas such as the coast and countryside, with walking being a favourable activity, in addition to visiting museums. Furthermore, when looking at the appeal of the coast in particular, this aspect ranks higher in the South East region versus the UK regions' average.[16]
- Despite the South East being the most visited region outside of London, less than a third of trips taken by overseas visitors to England are outside of the capital. In order to address this challenge, VisitBritain outlined key draws to encourage visitors to venture beyond London.[16] Heritage and history are the most common reason to travel outside London, although other aspects such as beautiful countryside and places that are fun and vibrant with contemporary culture are also major draws, as seen in figure 2. Encouraging people to travel outside London was also the key aim of the Discover England Fund.
- It was identified that inbound visitors are wiling to travel 2-3 hours from where they are based with their preferred means of travel being by train, as a significant proportion of them would have flown into the UK.[16] As the region benefits from excellent connectivity to European neighbours, this should be further capitalised by coastal destinations including the Isle of Thanet and marketed as being accessible, either directly from the continent or via train or car from London.[16]

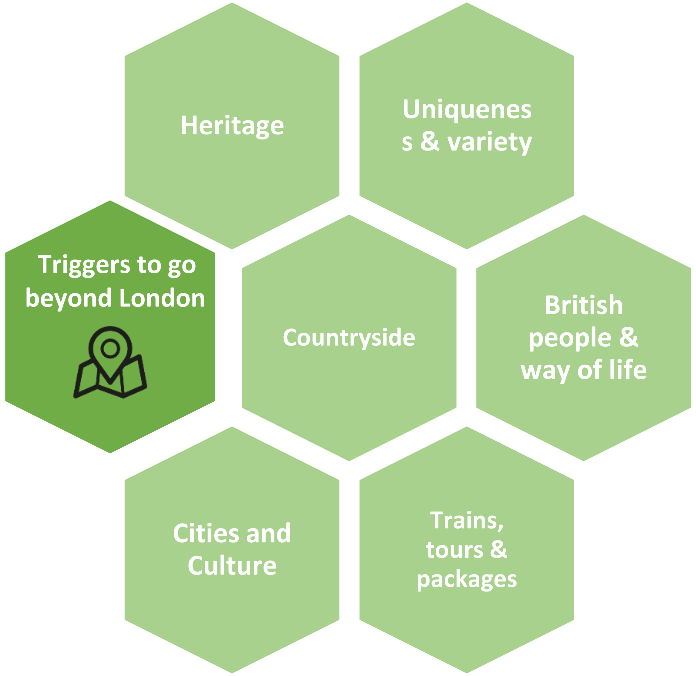



*Figure 2: Triggers to go beyond London*

- Looking at activities popular with **domestic visitors** in 2017, 35% of day trips involved a visit to see friends or family for leisure, 25% for a meal and 18% of trips involved participating in outdoor activities.[2] Furthermore, looking at the growth of particular attractions, visits to historic houses and castles saw a +4% increase compared to 2016 and other historic properties saw an increase of +8%. This shows the strong interest and motivation in participating in heritage-focused activities among domestic visitors.[20]

- To utilise visitor motivations and activities, it is important for destinations to fully understand the different products visitors are looking for and to establish where their destination sits and how its offering can be positioned. In a report published by VisitBritain and VisitEngland (2016), seven clusters combining types of destinations and activities that appeal to overseas visitors, based on the estimated current spend, were identified.[19]

- Furthermore, the report highlights the importance of coastal destinations as being vital assets and offering a number of motivations for visiting. Coastal areas sit within several of the clusters including scenery and rural life, outdoor leisure and action and challenge, as seen in figure 2.[19]

- Looking at motivations at a county level, from results of the Visit Kent Perception Research (2017), respondents were asked to select what would make them more likely to visit from a pre-defined list. The top three emerged as the range of visitor attractions, the quality of heritage and architecture, and the transport links.[17]


*Figure 3: Destination and Activities clusters, inbound markets (VisitBritain, 2016)*

## Isle of Thanet

- The biggest motivation for visiting the Isle of Thanet also emerged as the range of visitor attractions, followed by the quality of heritage and architecture and transport links, as seen in figure 3. Alongside this, nature-based activities stood out in relation to other Kent destinations.[18]
- Looking at the individual destinations, the top two motivations for Margate, Broadstairs and Ramsgate were the same as those identified for the district (visitor attractions, quality of heritage and architecture, and transport links). When looking at the third most popular motivation for Margate, transport links and free parking were identified alongside the arts and cultural offer, displaying evidence of the towns' strong connectivity and growing cultural scene.[18]
- In the case of Broadstairs, positive press coverage and transport links were the third most popular motivations. Interestingly, compared to the other two destinations, Broadstairs scored highest in terms of range of visitor accommodation.[18]
- It is clear from both an international and domestic viewpoints that heritage and history are a strong motivation to not only visit destinations generally, but to also persuade visitors to venture beyond London. The Isle of Thanet and its destinations score highly for these elements, offering an opportunity to further capitalise upon.
- In addition, as a coastal destination, key draws for visitors should also include utilising the scenery and rural areas and tapping into local authentic experiences and produce, as mentioned previously. [19]

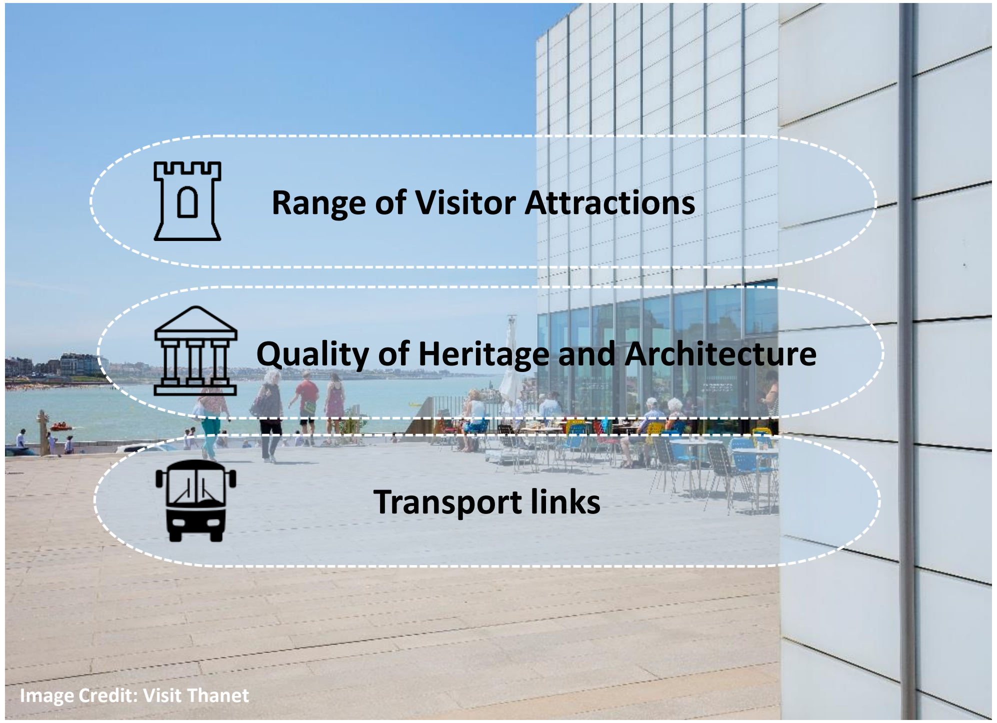



*Figure 4: Top three motivations for visiting The Isle of Thanet (Visit Kent Perception Research, 2017)*

- In a report published by the NCTA (2018), it was found that England coastal holidays have a more positive impact on personal relationships than UK holidays in general, with 85% agreeing they improve general wellbeing.[21] Further research conducted into activity holidays found that 49% of respondents had been on an activity holiday in England, although 31% did not perceive it as an activity holiday. In addition, 37% would choose a coastal destination for an activity holiday , although it was recommended that these types of holidays are not just about the actual activity in the minds of tourists and should also focus on other aspects such as local culture, quality accommodation and attractions. [23]

- Taking the above research into consideration, outdoor leisure and activity holidays could bring potential growth to coastal destinations if awareness is improved, allowing visitors to take in the scenery and local culture while promoting wellbeing and personal achievement.[23]

# Visitor Satisfaction

Alongside establishing visitor activities and motivations, it is also important to monitor levels of visitor satisfaction, as research shows strong levels of satisfaction can translate into strong advocacy and is instrumental in creating recommendations and positive word of mouth.[17]

- The Visit Kent perception research (2017) found that the average satisfaction score for Kent scores comparably with the average score for each destination in the UK.[17]

- In addition, according to the Kent Destination report published by VisitEngland (2016), when looking at visitor satisfaction, the Kent coast was rated higher than that of the country average.[24]

- Looking at levels of satisfaction for particular attributes, the highest scoring attribute for Kent was history and heritage (73%), higher than the GB average of 71%. This was then followed by being friendly and welcoming (67%), although this scored lower than the average level of satisfaction seen at a national level (74%). [24]

- Interest in day trip visitation is much stronger than overnight or short stays currently with Whitstable, Broadstairs and Isle of Thanet being the most popular destinations.[17]


Image Credit: Thanet District Council

# Perceptions and Awareness

This section examines how destinations are perceived both on a national and local level, in order to understand the strengths of destinations but also to identify potential opportunities for improvement.

**National**

- A report published by VisitBritain looked at how Britain is perceived internationally, based on the 2017 GfK Anholt Brand Index annual survey. This study is conducted in 20 counties, asking respondents to score 50 nations on various attributes related to tourism, culture, welcoming, etc (see figure 4). The results show that the UK ranked 3rd for tourism, increasing by two places since 2016. In terms of other attributes, the UK ranked 5th for culture and 6th for people, with the latter increasing one place since 2016.[25]

- Looking at word associations, words including, ‘educational’, ‘exciting’ and ‘fascinating’ emerged strongly, which is perhaps a reflection of the rich culture and history within the UK. The results also show that respondents exhibited a strong association with museums, alongside film and music.[25]

- However, the UK’s quality of welcome has declined steadily since 2015, indicating a need for destinations to continue to work to promote themselves as a friendly and welcoming place to visit to international markets.[25] This is more important than ever, in light of Brexit.

- Looking at perceptions on a county level, VisitEngland published various destination reports looking at perceptions among domestic visitors. The results show that quality of accommodation ranked highly (67%), above the GB average (64%). Alongside this, for thematic images, food and beverage performed well (55%), with the seaside also emerging as a strong association (45%), 15% higher than the GB average.[18]

**Kent**

- Furthermore, results from the Visit Kent perception research (2017) showed that the top three perceptions for Kent were, ‘range of attractions’, ‘quality of heritage and architecture’ and ‘transport links’.[17] The county’s strength in terms of transport is also reinforced through the findings from the non-visitor workshops carried out by Visit Kent, with Kent’s proximity to the channel and the continent offering a unique positioning in terms of ease of access.[30]

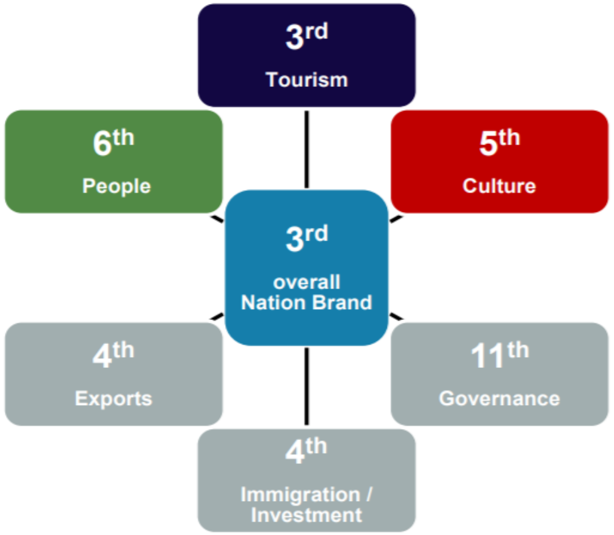



*Figure 4: UK ranking from results of the* GfK Anholt Brand Index (VisitBritain, 2017)


*Figure 5: Top three perceptions of Kent* (Visit Kent, 2017)

- As part of Visit Kent’s involvement in the European INTERREG 2 Seas PROFIT project, which aims to design an innovation programme for coastal tourism businesses, a series of visitor focus groups were carried out to better understand visitors needs and perceptions of the county. Initially, on a geographical level, visitors crudely divided Kent into two areas- coastal and inland. Those with more experience and returning visitors were able to distinguish assets further, highlighting the coast, then the weald with countryside and gardens, as well as the maritime, industrial, ‘nearest far-away place’ from London. Visitors do not think or plan trips based on district borders, but map areas based on common landscapes and themes instead. Looking at East Kent, the area is perceived to have a variety of coastline, invoking images including blue, gold, sea, cliffs, sky, beaches, seafood, eclectic and diverse, as well as fun and cultured.[31]

- Looking at the needs of different age groups when visiting East Kent, older visitors (aged 45-70 years) conveyed a need to experience the familiar to share and create memories with children and family members. They saw a visit to the Kent coast as an opportunity to indulge and relax, while also perhaps revisit previously visited historical sites, building upon their existing knowledge.[31]

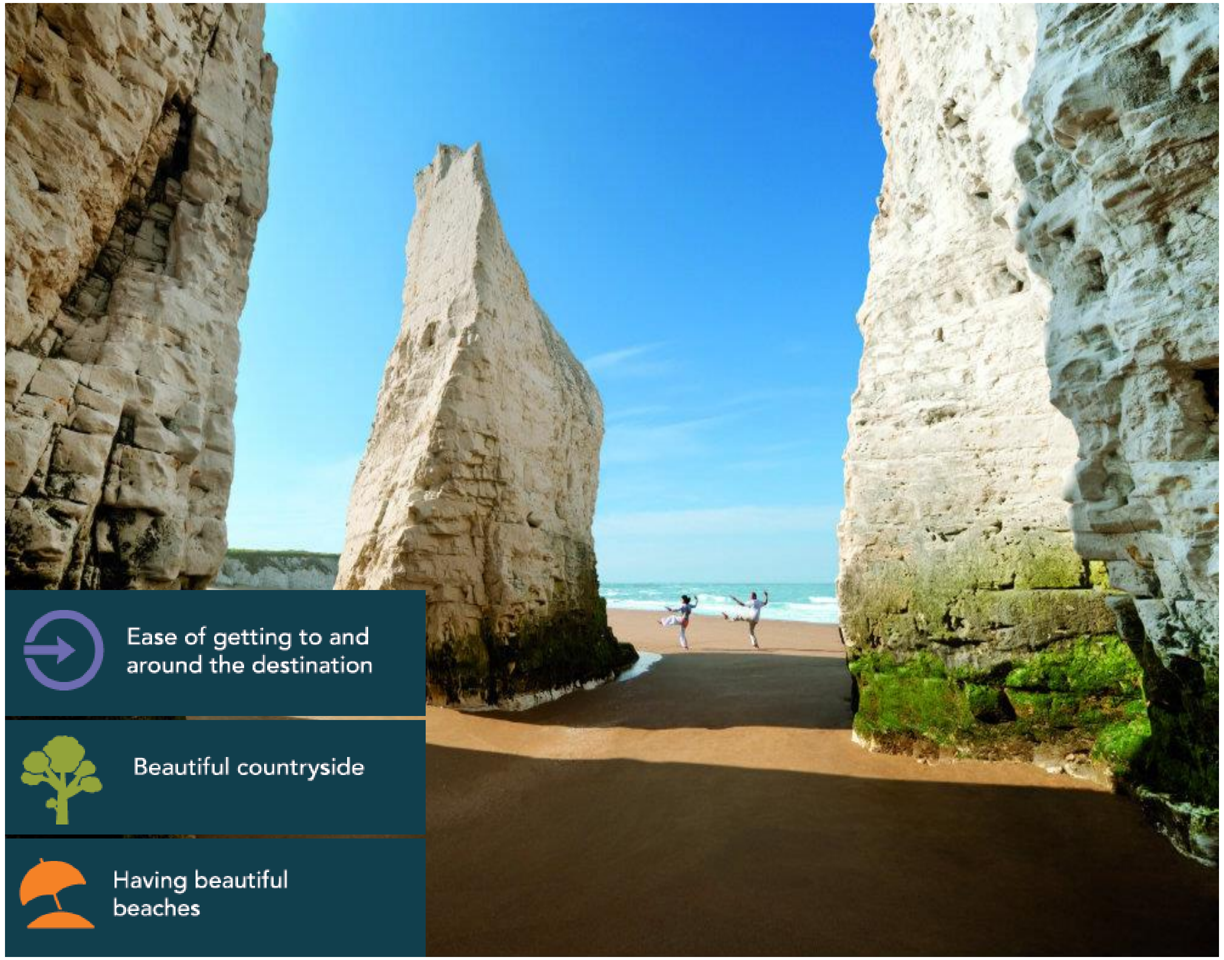
- Younger visitors’ (aged 18-44 years) needs are slightly more complex. They are attracted by the fact that aesthetically the area is not perfect, they can see it regenerate and this already holds appeal. This demographic also displays curiosity towards areas that are ‘up and coming’, and look to boost their social capital through visits to independent shops, new restaurants and trying local produce. In addition, younger visitors are attracted to the proposition of the different landscapes and novelty the Kent coast offers, facilitating opportunities for posting on social media.[31]


Image Credit: Dreamland, Margate

## *Isle of Thanet*

➢ With these findings above in mind, the Isle of Thanet certainly holds appeal to both the younger and older demographic in terms of visitor needs. The older market values the abundance of heritage sites and family-friendly attractions, alongside places to eat that are available. For younger visitors, Margate’s emerging image of being ‘Shoreditch-On-Sea’ and the area’s independent shops and places to eat are a major draw. Broadstairs and Ramsgate also offer a choice of harbours, beaches and scenery, alongside opportunities for local produce and a sense of an added ‘novelty’ to the traditional seaside, which can be used to market these areas further.

- The Visit Kent Perception research (2017) also focused on particular destinations, one of which being the Isle of Thanet, alongside each of its major towns, Margate, Broadstairs and Ramsgate. Each destination is rated positively as 'Coastal' and 'Seaside' destinations and score higher than competitors including, Great Yarmouth, Scarborough, Folkestone and Brighton. This has influenced Kent's overall perceptions, with Coastal emerging as a leading perception county wide.[18]
- The top three perceptions for the Isle of Thanet included beautiful countryside, beautiful beaches and ease of getting to and around the destination, highlighting Thanet's strengths in beautiful scenery and accessibility.[18]
- Margate scored highly in terms of having a range of attractions and things to do, alongside having beautiful beaches. When comparing against the results of the previous perception research study conducted in 2012, there has been a visible shift from the traditional associations with Margate towards a more cultural destination, with 'opportunities for arts and culture' ranking fourth. This transition to cultural perceptions support the ambitious goals set out in the DMP to invest in culturally-led tourism regeneration and to further develop the cultural offering and contemporary scene. [18]
- Beautiful countryside came across strongly in the case of Broadstairs and Ramsgate and while Broadstairs' key strength was beauty, Ramsgate performed well for its quality food and drink offer. Overall, Thanet destinations are perceived positively versus the competition for their beauty, tradition and welcoming nature.[18]



**Transport**

- All three towns scored highly in terms of ease of getting to and around the destination, illustrating the areas' accessibility and strong connectivity. This also supports the success of the aim set out in Thanet's DMP to bring the towns together and ensure the destination is reachable, alongside making the most of the connections with London and HS1.

- This perception is also reinforced by a report published by the NCTA (2017), which shows that the majority of non-visitors perceive coastal areas as being accessible, yet the majority of visitors are choosing to travel by car. However, the report also outlines concerns surrounding transport generally, with the most prominent concerns being around rail connections.[22]

- Looking at the figures of train journeys made to Margate, Broadstairs and Ramsgate, journeys on Off-Peak products increased by 33% from April 2016 to March 2017 compared to the previous year. The total growth seen from April 2015 to March 2018 across these three areas is significant, highlighting the growth in rail use and positive perceptions surrounding Thanet's connectivity and connections with HS1.


**Current and future visitation**

- Just over half of all previous Kent visitors state that they have visited Margate and Ramsgate in the past, the highest claimed visitation, with 53% and 51% indicating they were aware of, or had previously visited.[18]

- In terms of future visitation, more visitors claim to be interested in visiting Broadstairs for a day trip than anywhere else in Kent, with the exception of Whitstable. Alongside this, the Isle of Thanet is the most popular destination for a short break to be taken in the next two years.[18] The study also looked to identify barriers for visitation, with the most commonly cited reason for not visiting the Isle of Thanet and its major towns being 'I have thought about it but haven't had a specific reason to go'.[18]

**Barriers**

- The Visit Kent Perception research (2017) highlights the Isle of Thanet's strong product offering and as a destination, each of its individual towns demonstrate key qualities in the minds of consumers.

- It is clear that there is interest and consideration among consumers to visit, however to support this, barriers need to be addressed. The lack of purpose or reason to visit strongly illustrates the need to raise awareness of things to do and provide inspirational content to create those specific reasons to visit, as well as providing a sense of urgency to "visit now".[18]

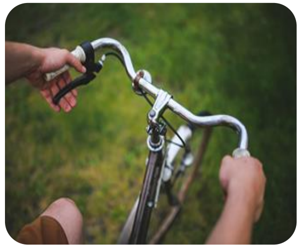
- Shifting the focus to coastal destinations in general, the NCTA published a report that aimed to identify potential barriers among non-visitors, alongside establishing which types of coastal destinations would be most appealing to certain demographics. In order to conduct the research, two stages were completed. Firstly, an online survey was used with a total of 1,506 respondents who had not visited the English coast for an overnight stay in the last five years, as well as a series of in-depth interviews. In terms of overarching perceptions of the English coast, 45% of respondents believe that the English coast is 'closed' during winter.[22]

- Respondents were shown various images representing six types of coastal destinations to indicate how likely they were to visit, alongside other questions such as what words they would use to describe the destination. The images were not meant to represent specific destinations, but aimed to create an impression of that type of destination. It is also important to note that coastal destinations encompass more than one of the following types.[22]

*Isle of Thanet*

➢ When looking at this in the context of Thanet, there are a number of coastal destination types the area encompasses including 'traditional seaside', 'harbour town', while also having the ability to tap into 'active breaks' and 'coastal retreats'. The NCTA also highlighted the challenges with the traditional seaside destinations, such as the weather and challenging the perception of it being too old fashioned. However, it is evident that in the case of Margate, this image has seen a shift that led to more contemporary cultural perceptions. These coastal destination types present clear ways to package the coastal offer and target various markets depending on the offer they look for.[22]

**NCTA- types of coastal destinations**



**Active Breaks**

Younger families & under 35's

Walking, Hiking & Canoeing

Scenic beauty, Coastal walks

✓

**Coastal Retreat**

Older families & empty nesters

Natural beauty, happy memories & quiet nature

✓

**Harbour Town**

Older families & empty nesters

Fishing harbour, traditional streets Traditional food and culture, shops

✓

**Lively Town**

Under 35's & young families

Fun, lovely atmosphere

**Traditional Seaside**

Mostly for young families

Fish & Chips, beaches and sandcastles

✓

**Port City**

Young families & under 35's

Aquarium, Historic ship

Attractions, shopping, maritime

# Challenges and Opportunities

**Although there is an interest and consideration among consumers to visit the Isle of Thanet, there is a lack of purpose or reason to visit expressed by non-visitors**
In order to raise awareness of things to do, unique aspects of each town need to be highlighted through providing inspirational content. It is very important to give each town a different identity based on its unique coastal offering - traditional seaside town, harbour town etc . In addition to this, the strong cultural presence and regeneration in the area and especially in Margate should be a major focus.

**Traditional seaside destinations having the perception of being too old fashioned**
There is a perception among visitors that traditional seaside destinations are too old-fashioned. As a destination with a significant and ever growing contemporary cultural offering, Thanet and particularly Margate have vast opportunities to further capitalise on this while continuing to challenge this perception through further regeneration projects and added dynamism.

**Issue of seasonality for coastal destinations and to challenge a 'closed in winter' perception**
To increase visits outside of summer, activities that are not weather dependant such as indoor cultural and heritage attractions should be promoted. In addition to this, working closely with quality serviced and cosy, self-catering accommodation providers, as well as better planned events programme outside the summer months could contribute to extending the season.

**Persuade visitors to travel beyond London**
Utilise and continue to promote strong transport links and HS1 connections with London. Destinations that promote wellbeing and relaxation. Findings from Visit Kent visitor workshops show that visitors look for something that London can't offer with the likes of country pubs, quirkier galleries, beaches, fresh air and walks. They want a change of pace and scenery, linking to an opportunity for relaxation and to destress and promote wellbeing.

**To further increase volume of overnight visits/staycations, in addition to attracting higher-spending visitors**
Encourage businesses to work in partnership to promote other attractions and partner with accommodation providers to offer inspirational content. Challenge the perception that coastal areas are in decline. Be clear on markets to target, tapping into the activity clusters proposed by VisitBritain. Further explore the active holidays market to increase awareness in walking, cycling and watersports.

**Increase the number of younger visitors**
Utilise interest from younger people in up and coming areas; Shoreditch on sea/independent shops/new restaurants/seaside novelty factor. Build on the interest expressed by younger visitors for a day trip to the area and turn these into overnight stays.

**Lack of knowledge of districts and that visitors see areas by common landscapes and themes**
Inspire the visitor experience through collaboration, to drive footfall and growth. Respond to emerging trends and experiential tourism, “live like a local”, go by how the visitor perceives the destination and where they find their inspiration.

**Changing visitor trends and a growing demand for personalisation of content**
There is significant opportunity to support DMOs and attractions to develop informed marketing plans and campaigns to increase visitor numbers through tapping into key visitor trends. This is highly focused on a desire for personalisation of content and providing aspirational ideas for visitors. The latter is also a major factor for those visitors wanting to increase their social capital and therefore opportunities for photos and video are key.

**Promotion of experiences and products**
Visitors want to fully immerse themselves and experience a destination, with the idea of escapism and self-improvement being significant draws and key emerging trends. Therefore, focus should be placed on promoting relaxing coastal retreats, outdoor activities and general wellbeing. Activity should highlight tourism experiences in the area, in particular those that involve authenticity and a sense of adventure and challenge.

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