SECONDARY MARKET RESEARCH

Analysis of Tourism, the Visitor Economy and Travel Trends in Thanet, Kent and England

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thanet district council

acorn SUSTAINABLE TOURISM CONSULTANTS

CONTENTS

Executive Summary

The current Destination Management Framework (DMF) is in its final year of delivery. The key focus of the 2020-2025 DMF was to grow and sustain the value of the visitor economy by developing higher-value, year round, quality tourism experiences which benefit visitors, the industry, the local community and the environment. Establishing strategic context and analysing trends will be key components to inform activity going forward.

This report provides a comprehensive analysis of tourism in Thanet, the visitor economy and recent tourism trends in Thanet, Kent and the broader UK domestic travel market, based on secondary research and data where available up to mid-2025.

Key Insights

Tourism in Thanet

- Thanet's key strengths were identified as vibrant towns and an exceptional coastline, but the tourism sector face challenges including seasonality and financial pressures.
- There were 4.6 million visitors to Thanet in 2023, close to pre-pandemic levels in 2019, with tourism valued at £349 million. *(Source: Economic Impact of Tourism 2023, Destination Research)*
- Thanet leisure visitors were primarily holidaymakers (51%) and those visiting friends and relatives (34%). Domestic overnight visitors stayed on average 2.5 nights while overseas visitors stayed 4 nights. *(Source: Economic Impact of Tourism 2023, Destination Research)*
- Thanet was a leading destination in Kent for overnight visitors, likely due to its appeal as a seaside escape and its easy accessibility to London.
- Food and drink, and shopping dominate visitor spending among both day and overnight visitors.
- Gaps in Thanet's accommodation market include high-end hotels, family-friendly lodging, self-catering and boutique accommodation. Airbnb listings have plateaued – Broadstairs has the highest occupancy and daily rates.
- Ramsgate has a high profile for outdoor activities among key target groups, while Margate's art offer at the Turner Contemporary has a strong local profile.

Tourism in Kent

- Kent is well-known as a leisure destination with many strengths including history and heritage, a wide range of attractions and the natural environment. However, it faces challenges including a lack of motivation to visit the county.
- There are many positive perceptions of Kent and Margate has high awareness as one of the five top destinations. Key strengths and priority product themes in East Kent were identified as the coast, landscapes, seafood, creativity, events and outdoor activities.
- Like Thanet, tourism to Kent has almost recovered to pre-pandemic levels but faces similar financial pressures. Visitors to Kent are broadly evenly spread between leisure and visiting friends and relatives (VFR).

Domestic Tourism in the UK

- Domestic tourism to England and the South East experienced a period of decline between 2023 and Q1 2025, according to VisitBritain, in terms of day trips and overnight trips.
- Analysis by destination type also revealed a broad decline to 'seaside and coastal regions' in England and the South East.

- Intention to take a domestic trip in 2025 remained high compared to 2024, with main barriers cited as the weather and the cost of living. Ways to mitigate against rising prices include spending less on accommodation and eating out and looking for things to do that are free.
- Top activities whilst on a domestic tourism trip (food and drink, walking and heritage) align with Thanet's offer.
- Overseas markets are key markets to the UK and to Kent/Thanet, and although the coast is not necessarily the top draw, there are markets keen on culture and adventure that might be worth exploring, for example, India.
- There is strong appeal for coastal tourism in the UK. There are high satisfaction levels and most visitors indicated a strong intention to return.
- However, challenges for businesses (increasing costs, lack of resources to invest and reducing staff) are likely to impact the visitor experience.

Outlook and Trends

- The reasons for the current decline in domestic tourism include the rising cost of living, competition from overseas destinations, and the UK's unpredictable weather.
- The UK's ageing demographic will have positive and negative impacts on domestic tourism – the challenge for tourism providers is to meet the needs of this growing group of domestic tourists.
- Nevertheless, the outlook for domestic tourism is positive. Up to 71% of UK residents intend to take a domestic holiday trip in 2025 and interest in, and intent to travel to, seaside and coastal destination remains high and is growing.
- In this current economic climate, fewer holidays are likely to be taken but spend per trip will increase.
- Key markets include older travellers and families as they seek convenience and accessibility.
- Immersive experiences are key to attract all markets such as food experiences, health and wellness, culture and heritage and outdoor activities. Cool-cations are an interesting development and could help combat seasonality among older age groups and families.
- Gen Y and Gen Z are also important markets, attracted by great experiences, spontaneity and flexibility. Their prolific use of social media provides a convenient method to reach them.
- Sustainability, accessibility and inclusivity are important considerations.

1. Tourism in Thanet

1.1 Thanet Destination Management Framework, January 2020

The Destination Management Framework (DMF) focuses on growing the value of Thanet's visitor economy and staying competitive by:

- Developing higher-value tourism and quality experiences
- Ensuring tourism is sustainable for businesses, the community and the environment

Headline priorities and actions:

- Vibrant towns – making Thanet's town centres more attractive for visitors and providing more of the right kind of accommodation:
  - Town animation – bring together stakeholders and businesses to make their own decisions and plans.
  - New and improved accommodation – to improve/upgrade quality of existing accommodation and support new developments.
- Coastline focus – focusing on providing year-round experiences, activities and facilities at key sites along the coast:
  - Beachfront facilities – develop beachfront facilities.
  - Activity and wellbeing – market-test water sports hub concept.
  - Seafront regeneration – develop concepts for Margate and other potential seafront regeneration sites.
- The Isle of Thanet promise – using the strong themes from Thanet's Shared Story to develop *brilliant experiences* and a *brilliant welcome:*
  - Experiences – relaunch Shared Story; create bookable experiences; enhance social media presence; identify new large scale event.
  - Welcome – review impressions and develop 'Brilliant Basics' plan; encourage local 'ambassadors'.

Development opportunities identified were:

- To attract more staying visitors who spend more, stay longer and have less negative impact on the local environment and community.
- To develop a range of distinctive experiences, events and activities that take account of tourism trends, like wellness, authenticity, and sustainability.
- To cater services for new audiences as societal changes offer opportunities, for instance increased solo travel and multi-generational families.
- To target the London market which is a substantial market within easy reach of Thanet.

The Isle of Thanet's Shared Story:

- A place to escape to, year round – the original seaside escape
- A place with history
- A friendly, creative place
- A place with natural beauty
- A place that inspires
- A place that's happening

Source: Thanet Destination Management Framework 2020

Key Insights:

- Thanet's exceptional resources of vibrant towns and coastline were identified as key strengths in the DMF. But the DMF also highlighted the vulnerability of the visitor economy, common in UK coastal towns, on account of dwindling finances and other competing pressures.
- Creating high quality experiences that can be enjoyed year round, and ensuring sustainability in tourism were the key focus points for the current DMF.

1.2 Thanet Visitor Economy 2023

There were 4.58 million day and staying trips to Thanet in 2023, an 18% increase compared to 2021 (3.9 million trips), and 1% fewer trips than in 2019 (4.6 million trips). Value of tourism in 2023 was £349 million, an increase of 65% compared to 2021 (£212 million). In 2019 tourism was valued at £352 million, 1% more than in 2023.

These figures suggest that tourism to Thanet has all but recovered to pre-pandemic levels.

Table 1.1: Thanet Visitor Economy 2023

Key Indicators	Visitor Numbers	£ Value	Nights	Average Length of Stay
All Visitors	4.6 million	£349 million	-	-
Day visitors	4.1 million	£163 million	-	-
Overnight visitors	0.5 million	£122 million	2 million	4.0 nights
Domestic overnight visitors	315,000	£55 million	0.8 million	2.5 nights
International overnight visitors	171,000	£68 million	1.1 million	6.4 nights

Source: Economic Impact of Tourism 2023, Destination Research

By purpose of visit, holidaymakers accounted for more than half of all visitors to Thanet (51%) and VFR (Visiting Friends and Relatives) over one third of all visitors (34%). 8% were business visitors and a further 7% visited for other purposes, including overseas study visits. This is a marked difference from the visitor make up to Kent as a whole, see section below, Kent Visitor Economy 2023.

Table 1.2: Purpose of Visit

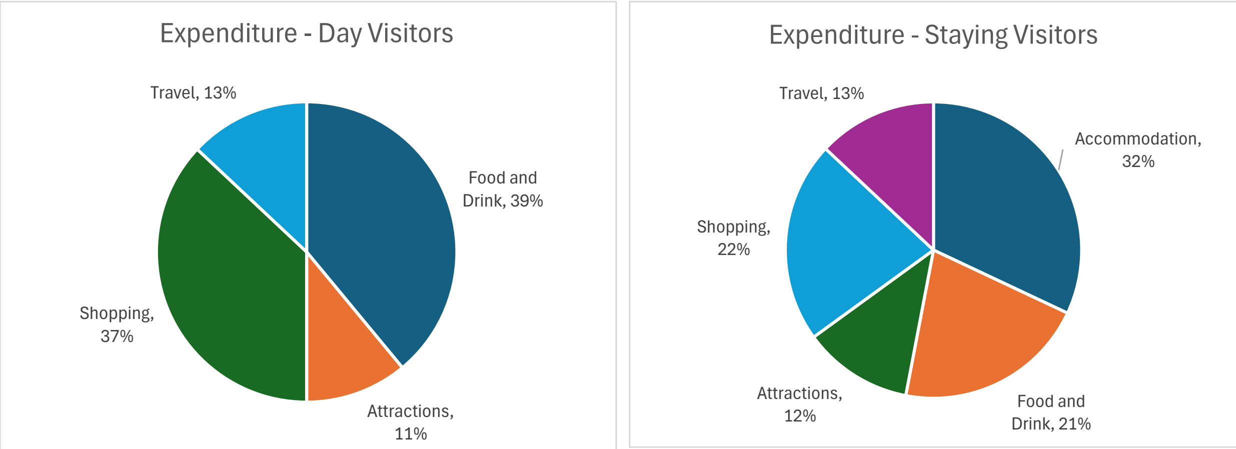
Purpose of Trip	% Share	Average Length of Stay	Average Spend £ per trip
Holiday	51%	3.5 nights	£269.64
Business	8%	2.8 nights	£312.57
VFR	34%	2.9 nights	£117.69

Source: Economic Impact of Tourism 2023, Destination Research

Day visitors spent almost four fifths of their budget on both food and drink (39%) and shopping (37%). Staying visitors spent almost one third of their budget on accommodation (32%), and broadly one fifth on each shopping (22%) and food and drink (21%).

Both groups broadly allocated the same amount to expenditure on attractions and transport.

Figure 1.1: Expenditure by Day and Staying Visitors



Source: Economic Impact of Tourism 2023, Destination Research

An analysis of overnight stays in Thanet in 2023 found that overseas visitors were a key market in terms of overnight trips, staying nights, and expenditure:

- Thanet accounted for 15% of **overnight trips** by overseas visitors to the region, behind Canterbury (18%), and 9% of domestic visitors, behind Canterbury (13%) and Medway (11%), equal with Folkestone & Hythe (9%).
- Thanet accounted for 18% of **staying nights** by overseas visitors to the county, behind Canterbury (20%), and 9% of domestic visitors, behind Canterbury (13%), Medway (12%), Swale (11%) and Folkestone & Hythe (10%).
- Thanet accounted for 20% of **expenditure on overnight trips** by overseas visitors to the county, the top destination, and 10% of domestic visitors, behind Canterbury (13%) and Dover, and Folkestone & Hythe (each 11%).

Key insights:

- That Thanet has broadly recovered from the pandemic is positive and compares favourably with the South East in general (see Domestic Tourism Statistics 2023 to 2024 below). This gives a solid base from which to target growth.
- Visitors to Thanet were predominantly holidaymakers and although they spent less than business visitors, they spent more per trip than typical holidaymakers to Kent.
- The overnight overseas market was a key market in terms of numbers of overnight trips, staying nights and expenditure.

1.3 Thanet Tourist Accommodation

1.3.1 Thanet Accommodation Study

There is a lack of up-to-date information about Thanet's tourist accommodation stock. In 2019, Thanet was positioned in the top third of Kent's districts for business bed nights and mid-third for holiday bed nights. There was a greater predominance of 3-star accommodation compared to 4-star accommodation in Thanet, and 66% of visitors stay in paid accommodation. The study identified a growing market for accommodation catering for large scale events, the cultural and creative market, and accommodation for film crew. Other gaps were identified as follows:

- High end serviced accommodation
- Coastal glamping

- Small-scale beach accommodation

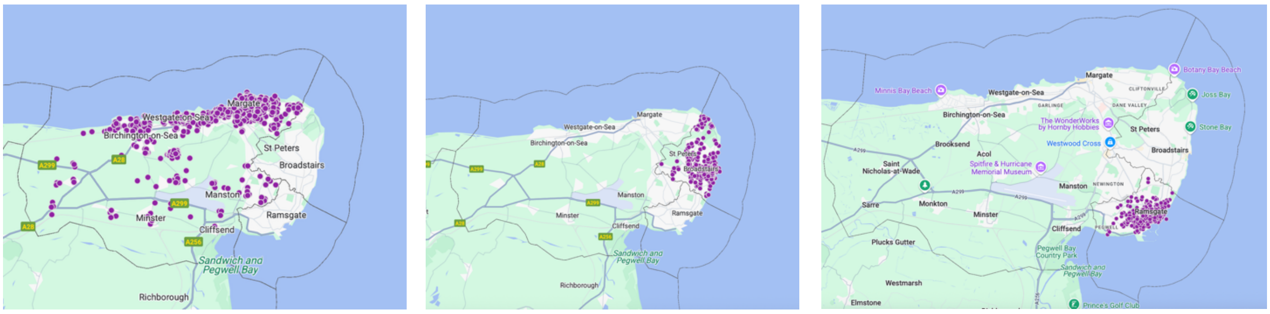
Source: *[Accommodation Survey – District Dashboard Thanet]*

1.3.2 Airbnb in Thanet

The Airbnb market is flat in Thanet. In May 2025, there were 1,421 active listings on the platform across the three towns, a figure that has remained stable over the past three years. Margate has the largest number of listings, but the boundaries for Margate extend beyond the town itself.

Figure 1.2: Airbnb Indicators for Thanet

Performance Indicator	Margate	Broadstairs	Ramsgate
Number of listings (May 2025)	799	351	271
Average Occupancy Rate (2024)	46.7%	50.2%	44.8%
Average Daily Rate (2024)	£169	£187	£169
Average Length of Stay (2024)	2.7	3.3	3.1



Source: Airdna, 2025

Performance indicators for Thanet reveals that occupancy rate was highest in Broadstairs during 2024 (50.2%), and people also stay longer on average (3.3 nights). Average Daily Rate (ADR) was also highest in Broadstairs (£187).

By comparison, in the UK, popular Airbnb markets show occupancy rates of between 55-77% depending upon location, property quality and seasonality.

Key insights:

- Tourism accommodation stock in Thanet was inadequate to cater for new markets including large scale groups, high-end/boutique accommodation, and coastal self-catering.
- That Airbnb listings remain flat in Thanet could suggest the market has reached saturation point in the region.

1.4 Thanet Local Plan 2020

Provision of sufficient quality accommodation to support increased tourism spend and to help extend the season was a key tourism priority outlined in the Local Plan. Overall, Thanet required a wide range of accommodation development across different budgets and to attract a range of staying visitors. Key findings were:

- Existing hotel provision caters well for the budget hotel market and has been increasing in recent years.
- There is a lack of hotels at the top end of the market (4 star and above).
- There is a lack of holiday accommodation suitable for families.
- There is increasing demand for boutique/designer hotels to cater for more sophisticated tastes.
- There is increasing need for accommodation to attract the short break market.
- There is relatively limited self-catering accommodation, other than caravan accommodation.

Source: Thanet District Council Local Plan 2020

Key insights:

- To attract more overnight visitors, additional accommodation options that meet needs are required.
- There is a recognised need for more tourism accommodation suitable for different markets including boutique hotels and 4 star properties to attract the short break market and self-catering suitable for families.

1.5 Active Ramsgate – Consumer Survey 2024

Active Ramsgate promotes a range of outdoor activities and experiences on the Ramsgate coast including walking, cycling, bird watching, kitesurfing, paddleboarding, kayaking and boat trips. The purpose of the research was to explore the behaviour and motivations of four key target groups that visit Ramsgate to understand their preferences for outdoor activities in Ramsgate. The target groups were mirrored to those identified by Visit Kent as follows:

- **Social contemporary seekers** – 18-35s, pre-kids, likely in or around London
- **Changing family dynamic** – multi-generational families in Kent
- **Green spacers** – 50+/retiree couples who love the outdoors, from Kent and the South East
- **Hyper locals** – Ramsgate and Thanet residents, including those visiting friends and relatives

The study found that:

- Most respondents had visited or wanted to visit the coast, and visits to Ramsgate were relatively high.
- There was a high awareness of Ramsgate and Active Ramsgate. Social contemporary seekers were the group with the highest levels of awareness.
- The most popular outdoor activities among respondents were nature walking and hiking, town and heritage walking, and cycling.
- Sea swimming and kitesurfing were highlighted as other popular outdoor activities.
- Other activities enjoyed by respondents were pottery and sculpting, painting and photography expeditions.
- Green spacers were less interested in trying new activities, except for bowls, pétanque and gardening.

Key insights:

- The Visit Kent (and Ramsgate) target markets are clearly matched with those targeted by Thanet District Council’s Tourism Service.
- The outdoor offer is strong in Ramsgate and there is potential to mirror the offer in Margate and Broadstairs

1.6 Turner Contemporary Visitor Research 2024

Turner Contemporary undertakes an annual visitor survey to find out who visits the gallery, why they visit and what they think of the exhibitions.

Key findings in 2024 were:

- Women made up around two thirds of those surveyed.
- Fewer retired people were surveyed in 2024, a 50% difference compared with 2023.
- The survey revealed a higher local profile than in previous years with more visitors from Margate, Thanet and Kent. Most visitors attended with friends and family or alone, which attests to the ‘local’ profile of the attraction.
- Interest in art was the key reason to visit among visitors (although there was a slight dip between 2023 and 2024). All the exhibitions were well regarded in general.
- New visitors found the experience to be more enjoyable than repeat visitors. However, more than nine out of 10 visitors would recommend the gallery to others.
- The main issues were reported to be due to facilities at the café.

Key insights:

- Broadly, Turner Contemporary stands out as a quality art attraction which has a strong local visitor profile.

2. Tourism in Kent

2.1 Kent Destination Management Plan 2024-2029

Kent's tourism sector faced several challenges that included perceptions impacted by negative media coverage; the challenge of low productivity on account of seasonality issues and lack of accommodation stock; and the need to create new and exciting reasons for tourists to visit and stay longer in Kent. Consequently, the DMP was shaped around four main objectives and accompanying priorities to grow Kent's visitor economy:

- **Place** – to improve the perception of Kent
    - Showcase Kent's assets and stories
    - Represent county at national level
- **Prosperity** – to improve the productivity of the visitor economy in Kent to create jobs and prosperity.
    - Increase overnight stays
    - Encourage visits out of season
    - Attract new markets
    - Generate new jobs for local people
- **Product** – to create new reasons to visit Kent and generate a welcoming visitor experience through collaboration between stakeholders and businesses.
    - Facilitate regional networking
    - Improve quality, inclusivity and accessibility of visitor offer
    - Capitalise on growing awareness of food, drink and wine offer
- **People and Planet** – to bring together businesses, residents and visitors to positively impact community, climate and nature.
    - Educate and inspire visitors to protect nature and improve well-being
    - Address barriers to visit
    - Instil local pride and transform residents into ambassadors

The DMP outlined the key domestic and international audiences:

Domestic Markets	International Markets
Social contemporary seekers – millennials who are couples with/without small children, small groups of friends **Changing family dynamic** – families with children, single parent families, multigenerational families **Green spacers** – older couples interested in outdoors, traditional/cultural experiences **Hyper local families** – local residents and VFR	**Germany** – motivated by countryside offer **USA** – driven by unique experiences **Spain** – inspired by history and heritage **France** – inspired by active and outdoors

The DMP outlined the main tourism product themes across three distinct regions in Kent:

- **East Kent:** product and identity strengths in coast, landscapes, seafood, creativity, events and outdoor activities
- **West Kent:** product strengths in food and drink, especially vineyards, walking, historic villages, countryside, heritage and well-being

- **North Kent:** product strengths in maritime links, literature, culture, multiculturalism and heritage

The external factors and key trends identified as important influencers of consumer behaviour and the sector generally included:

- Relaxation and wellness – a top reason for travel in 2024
- Experiences over things – as people place more emphasis on authentic and unique experiences over the purchase of items
- Conscious consumer – as consumer demand for sustainability in travel grows, though price remains a barrier
- The pursuit of value – for quality experiences
- Rising business costs – and economic uncertainty
- Ageing population – by 2040, 1 in 7 people will be aged 75+ driving increased accessibility needs
- Working patterns – as consumers seek an improved work-life balance through flexible working and blend work with leisure
- AI and media consumption – demand for convenience

Source: Kent Destination Management Plan 2024-2029

Key insights:

- Kent faces challenges in the tourism sector, including a lack of motivation to visit the county.
- Key strengths in East Kent were identified as the coast, landscapes, seafood, creativity, events and outdoor activities, clearly aligned with those of Thanet.

2.2 Kent Visitor Economy 2023

In 2023, there were 65.99 million day and staying trips to Kent, an increase of 28% compared to 2021 (51.5 million), and 1% fewer than in 2019 (66.5 million). Value of tourism was £4.08 billion, an increase in value of 58% (2.6 billion) compared to 2021. Value of tourism in 2019 was £4.14 billion, a difference of 2%.

As in Thanet, tourism to Kent has all but recovered to pre-pandemic levels.

Table 2.1: Kent Visitor Economy 2023

Key Indicators	Visitor Numbers	£ Value	Nights	Average Length of Stay
All Visitors	66 million	£4.1 billion	-	-
Day visitors	61.5 million	£2.3 billion	-	-
Overnight visitors	4.5 million	£884 million	15.4 million	3.4 nights
Domestic overnight visitors	3.3 million	£540 million	9.2 million	2.8 nights
International overnight visitors	1.2 million	£344 million	6.2 million	5.2 nights

Source: Economic Impact of Tourism 2023, Destination Research

By purpose of visit, broadly two in five visitors to Kent were holidaymakers (43%) and a further two thirds were VFR (42%). There is a lower average spend per trip in Kent compared to Thanet across all three trip purposes. However, visitors tend to spend longer in Thanet than Kent.

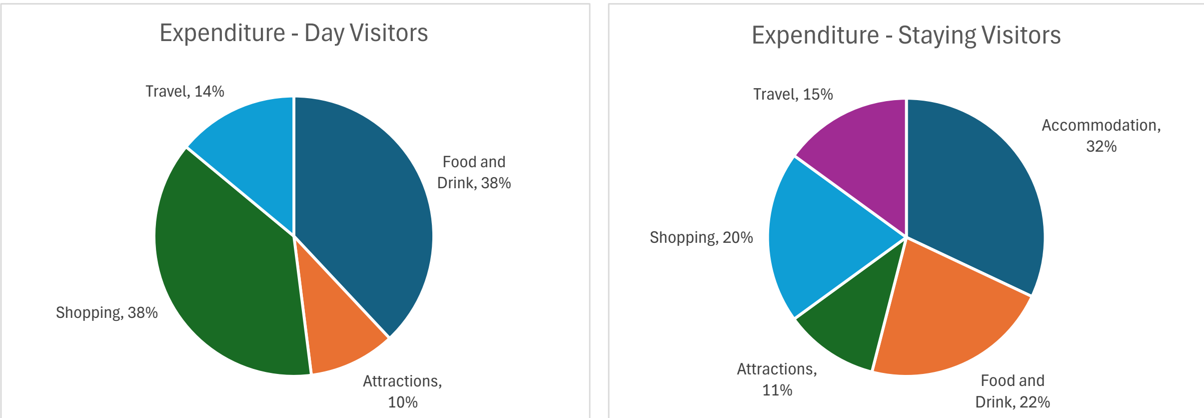
Table 2.2: Purpose of Visit

Purpose of Trip	% Share	Average Length of Stay	Average Spend £ per trip
Holiday	43%	3.6 nights	£236.26
Business	11%	2.9 nights	£272.17
VFR	42%	3.1 nights	£112.58

Source: Economic Impact of Tourism 2023, Destination Research

Day and staying visitors to Kent spend their money in similar proportions to visitors to Thanet. Food and drink are the largest categories for day visitors (each 38%), while accommodation is the top category for staying visitors (32%), followed by food and drink and shopping (22% and 20% respectively).

Figure 2.1: Expenditure by Day and Staying Visitors



Source: Economic Impact of Tourism 2023, Destination Research

Key insights:

- As in Thanet, the visitor economy in Kent has almost recovered to pre-pandemic levels. Compared to the rest of the South East, Kent and Thanet are bucking the declining trend, putting the region on a good footing to target growth.
- 80% of its visitor market is broadly evenly split between leisure visitors and VFR, compared to Thanet which has a larger group of leisure visitors.

2.3 Visit Kent Perception Study 2022

This perception study was conducted to gather insight into the experiences and expectations of visitors to Kent. Research topics included past and future visitor profiles; past visitor experience; opinions, expectations and perceptions of Kent; appeal of activities and experiences; benchmarking against other destinations; and travel behaviours.

Kent is well known as a leisure destination and various descriptors from visitors highlight the positives, such as 'countryside', 'relaxing', 'beautiful', 'scenic' and 'seaside'. Kent's core perceived strengths include history and heritage, a wide range of attractions and things to do, and the natural environment, which have high awareness. However, the research uncovered a lack of strong motivation to travel to Kent.

Key positive findings included:

- 86% saw Kent as a leisure destination or for holidays
- 41% of respondents staying longer rated their trip ‘excellent’
- The top five places with the highest levels of awareness were: Dover, Canterbury, **Margate**, Folkestone and Tunbridge Wells
- 60% rated heritage/history as either ‘excellent’ or ‘very good’
- 56% rated Kent’s natural environment as ‘either ‘excellent’ or ‘very good’
- 51% rated Kent’s food and drink offer as either ‘excellent’ or ‘very good’

Key negative findings included:

- 71% felt they had no compelling reason to visit Kent, making this a significant barrier to visiting
- 18% did not consider it easy to travel to Kent
- Only 41% considered immersive experiences to be either ‘excellent’ or ‘very good’
- The top negative impacts of tourism in Kent were stated to be traffic and congestion; impact on natural environment and wildlife; litter and pollution; and lack of parking

Source: Kent Perception Research 2022

Key insights:

- The high perception of Kent as a leisure destination provides a great starting point to promote the region of Thanet and seek to motivate visits to the region.
- In addition, the high percentage of visitors to Kent that state heritage, the natural environment and the food and drink offer in the country align with Thanet’s strengths and should therefore be placed high in importance.
- At the same time, the negative issues around the ease of travel to Kent, limited immersive experiences and traffic/congestion should be considered for Thanet’s next DMF.

3. Domestic Tourism in the UK

3.1 VisitBritain

3.1.1 Domestic Tourism Statistics 2023 to 2024

Figures from VisitBritain indicate domestic tourism to the South East between 2023 and 2024 experienced a period of decline. Key findings from the latest *Great Britain Tourism Survey (GBTS) found that:

Between 2023 and 2024:

- Across the whole region, domestic tourism to the South East declined in both day trips and overnight trips in 2023 compared to 2024.
- There was a 16% decline in numbers of day trips in 2024 compared to 2023.
- Number of overnight trips to the region also declined, by 12% between 2023 and 2024.
- *By contrast, VisitBritain reported increased overnight trips to London, North West, East Midlands, West Midlands and Yorkshire between 2023 and 2024.*
- In terms of spend, there was an increase in expenditure on day trips of 3% between 2023 and 2024, likely a reflection on higher prices.
- A 5% decline in expenditure on overnight trips was reported in 2024.
- Analysis by destination type revealed a broad decline in both England and the South East in overnight trips to 'seaside and coastal regions'.

Between Q1 2024 and Q1 2025:

- Day and overnight trips to the South East continued to decline in Q1 2024 compared to Q2 2025.
- A 2% decline in day trips was reported in Q1 2025 compared with Q1 in 2024.
- Overnight trips noted a further decline in Q1 2025 of 17%.
- *By contrast, VisitBritain reported increased day trips to the East of England, North East and West Midlands in Q1 2025.* Expenditure declined by 11% decline in Q1 2025 compared with the same period in 2024.
- In England, spend per overnight trip increased from £249 in Q1 2024 to £352 in Q1 2025, a rise of 41%.

**It is not possible to compare 'like for like' as Thanet figures for 2024 are not available.*

Key insights:

- As we have seen, following the pandemic Kent and Thanet have performed better than the regional average, each having broadly recovered.
- Along with Kent and Thanet, there are other regions performing better across Great Britain.
- Thanet Tourism should consider the potential implications of declining interest in overnight stays at 'seaside and coastal regions' while preparing the DMF.

Table 3.1: Volume and Value of Domestic Tourism in England and South East, 2023 to Q1 2025

Indicators	2024	2023	Q1 2025	Q1 2024
DAY TRIPS (million)				
England	906	1030	184	202
South East	157	186	31	31
Day Trips in SE as a % Share of England	17%	18%	17%	15%
% Change y-on-y (South East)	-16%	9%	-2%	-19%
Day Trips Spend (£ million)				
England	£48,405	£48,405	£9,218	£10,359
South East	£7,671	£7,480	£1,301	£1,454
Spend in SE as a % Share of England	16%	15%	14%	14%
% Change y-on-y (South East)	3%	23%	-11%	4%
Average Spend Per Day Trip				
England	£53.41	£46.99	£50.09	£51.37
South East	£48.95	£40.15	£42.53	£46.61
OVERNIGHT TRIPS (million)				
England	89.6	99.4	18.9	17.9
South East	14.3	16.3	2.8	3.3
Overnight Trips in SE as a % Share of England	16%	16%	15%	19%
% Change y-on-y (South East)	-12%	-4%	-17%	-13%
Nights (million)				
England	255.7	280.3	49.6	49.4
South East	34.5	41.2	7.4	7.3
Nights in SE as a % Share of England	13%	15%	15%	15%
% Change y-on-y (South East)	-16%	-8%	2%	-23%
Overnights Average Length of Stay				
England (number of nights)	2.9	2.8	2.6	2.8
South East (number of nights)	2.4	2.5	2.7	2.2
Overnights Spend (£ million)				
England	£27,336	£26,045	£6,639	£4,455
South East	£3,363	£3,534	£654	£641
Spend in SE as a % Share of England	12%	14%	10%	14%
% Change y-on-y (South East)	-5%	1%	2%	-18%
Average Spend Per Overnight Trip				
England	£305.13	£261.92	£351.28	£249.44
South East	£234.86	£216.19	£236.37	£192.85

Source: VisitBritain, GBTS Volume and Value by Region, 2025

3.1.2 Domestic Sentiment Tracker - June 2025

- 76% of those surveyed in June 2025 intend to take an overnight domestic trip over the next 12 months, compared to 77% in June 2024.
- The main barriers were stated as the weather (33%) and the rising cost of living (31%).
- 66% of respondents took an overnight break in the UK over the past 12 months.
- 15% took an overnight break in the UK in April/May 2025.
- The cost of living crisis was a key concern for respondents. 63% said they are either 'cautious and being very careful' (46%) or have been 'hit hard and are cutting back' (17%).
- The top three ways to cut overnight spending were to choose cheaper accommodation, spend less on eating out, and look for more free things to do.
- The top three ways to cut day trip spending were to look for more free things to do, spend less on eating out, and take fewer day trips.
- While commitment for overseas trips was higher than for UK trips (80% vs 66%), UK adults are more likely to choose UK trips (35%) over overseas trips (28%).
- Over the next three months (July to September), shorter breaks (1-3 nights) will dominate over longer breaks (4+ nights), a similar trend to 2024.
- Top motivations for overnight trips was 'family time or time with partner' and 'getting away from it all and have a rest'. 'Connect with nature/be outdoors' (July to September) and 'to experience excitement or fun' (October to December) were further motivations.
- Top activities for both July to September and October to December were 'trying local food and drink'. Others included 'walking, rambling, hiking', 'visiting heritage sites, and 'visiting family attractions'.

Source: Domestic Sentiment Tracker – June 2025

Key insights:

- Intent to take a domestic break is high which is good news for Thanet. However, price and the weather continue to be influencing factors. Domestic tourists will be seeking good value but are more likely to cut things out than sacrifice quality. Free things to do will be especially appealing.
- Top activities (food and drink, walking/hiking and heritage) comfortably align with Thanet's tourism offer.
- Increased interest in outdoor activities align with the ongoing trend for personal health and wellness.

3.1.3 Motivations, Influences, Decisions and Sustainability Research 2022 (MIDAS)

The MIDAS study was conducted to explore international tourist motivations, decision-making and sustainability. Respondents were drawn from 29 countries, both visitors and those considering visiting.

Key findings:

- There is a keen interest in visiting the UK from international markets, especially long-haul markets (Middle East, China, India and the USA). Many intend to combine the UK with other European destinations.
- Barriers to visit include Brexit and cost. The war in Ukraine was cited as a further barrier, especially among younger travellers and long-haul travellers.

- Value for money, welcoming environments and freedom to explore are key motivations for the international market. Motivations by market differ, such as the appeal of culture for western Europeans, high activity for Americans, and food and drink for Asian markets.
- The UK is perceived as a vibrant, cultural and historic destination. However, it lags behind in terms of value for money and food diversity.
- Coastal destinations have appeal to certain markets but are not as strongly associated with the UK in the minds of international tourists.

Source: MIDAS December 2022

Key insights:

- Although the UK is highly sought after by international visitors, England's coast is less of a key attraction. It is possible that the reputation of the country's weather plays its part, but the UK's strong cultural and heritage offer continue to remain at top of mind.
- While international tourists are broadly interested in coastal destinations in the UK, the Kent coast is less popular, possibly because it is less well-known. To attract the international market, it is key to emphasise perceptions of affordability, food and inclusivity, plus unique experiences across history, culture and coastal landscapes.
- Targeting the overseas market from London may be one route to draw in the overseas visitor to the Thanet coast.
- Other overseas markets should be investigated. Millennial tourists from India for instance, are known to be adventurous and looking for less visited places.

3.2 National Coast Tourism Academy Research

3.2.1 England's Coast Consumer Survey 2024

An online survey conducted between November and December 2023 to measure satisfaction from visits to England's coast during 2023. Key findings were:

- The main motivation to visit the coast was **relaxation, quality time with friends/family, and sightseeing/exploring**.
- 98% were **satisfied** with their coastal break in 2023.
- 83% would like to **visit the coast again** within the next year.
- 88% thought their holiday was either **excellent or good value for money**.
- 74% claimed that **reducing their carbon footprint** or making more sustainable choices on holiday was important.
- 65% would like more **businesses to be open during the winter**.
- 59% would like more **free activities** at the coast.
- 59% would like more **locally sourced food and drink**.
- Looking forward: **price is the top factor** influencing consumer bookings in 2024.

Other takeaways from the research included:

- Respondents were predominantly **older** – 75% were aged 55+. This group typically have more time and money to spend on trips and holidays.
- The most popular coastal destinations were Cornwall (15%), Yorkshire (13%), Dorset (10%) and Devon (9%). **Kent** accounted for 3.5% of respondents, among the less visited destinations.
- The most popular months for visits to the coast were **June** (19%) and **September** (18.5%), reflecting the older age profile of respondents. 22% visited in July and August combined.
- Most popular activities were eating out (82%), spending time on the beach (66%) and walking the coast path (58%).
- Car was the most popular form of transport to the coast (76%). However, public transport (train/bus) was important for 27%.

Future intentions:

- 75% would return to the same location; 71% would consider other UK coastal destinations.
- 43% visit the coast several times a year
- 40% visit at least once a year

Economic considerations:

- 39% are more likely to holiday in the UK
- 32% will make no change to their holiday plans in 2024
- 35% will look for special offers and discounts

Sustainability factors:

- The most important factors were reducing single-use plastics (95%), buy/consume local produce (95%), and paying staff the living wage or above (96%).
- Although sustainability is important, price is still more important for 38%.

Source: England's Coast Consumer Survey 2024

Key Insights:

- The satisfaction reported with trips to the coast broadly reflect current experiences in Thanet, as evidenced in the social media listening.
- In the current climate, price is the top factor impacting consumers and Thanet Tourism must ensure its offer is good value.
- Sustainability: it is common these days that consumers agree with the importance of sustainability actions. However, the 'say-do' gap is significant – a large proportion do not actually 'do' what they 'say'. Price is a major factor that impacts sustainability choices. It will be important for Thanet to tell their sustainability stories to keep the topic at top of mind and sustain interest and help visitors to make more sustainable choices.

3.2.2 Tourism Business Survey 2024

Winter Wave (November/December 2024)

- 66% of businesses reported profitability down on 2023
- 59% stated the increased NI contributions will have a significant impact, and 21% state they will have a moderate impact.
- Key external factors affecting business: economic climate (81%), increasing costs (79%), poor/unpredictable weather (60%).
- Top priorities: reduce costs (94%) and increase year-round business (87%)
- Addressing challenges:
    - 58% will increase prices
    - 51% will delay investment
    - 31% reduce staffing
- Interest is highest among walkers (78%), nature and wildlife (65%) and cycling (56%).

Source: Coastal Tourism Business Survey, Winter Wave 2024

Key Insights:

- Businesses report challenging conditions in which to do business. However, higher prices imposed by businesses will impact on visitor decisions and the visitor experience. Such decisions could include staying for shorter periods, or not eating out, as well as reduced satisfaction.
- Businesses' vulnerability in the current economic climate and combined with rising costs are likely to impact the ability to attract and retain visitors to Thanet year round. This is a significant threat to tourism development in Thanet.

4. Outlook and Trends

4.1 Introduction

The reasons for the current decline in domestic tourism in the UK are complex and multiple. Inflation and the cost of living crisis has contributed to an ongoing lack of consumer confidence – since 2019, prices have risen by a significant 26%. As business costs rise, increased prices are passed on to consumers, in areas including fuel, accommodation and eating out, all of which impact British travel budgets.

At the same time, holidaying overseas has become cheaper for families. Low cost airlines fly to many convenient destinations and once there, living prices are often cheaper than in the UK. With the expansion of airports such as Luton, it is anticipated that more British tourists will choose to travel abroad.

The British weather also plays its part, particularly when it comes to planning ahead. This creates volatility for local tourism businesses as there is a rising trend for making last minute decisions based on the forecast. Seaside towns and regions are particularly susceptible to this type of behaviour, and guaranteed sunshine is another reason for British tourists opting to travel abroad to convenient destinations like Spain, Greece and Turkey.

However, rising temperatures in Europe could have a positive effect on UK domestic tourism. There is evidence that 'cool-cationing' (choosing cooler destinations in summer) is becoming interesting. Families with young children and older people, for instance, may opt for a UK holiday to avoid the extreme heat – seaside spots like Thanet could benefit. But price limitations will continue to affect consumer choices.

Finally, the UK's ageing demographic (there are 22 million people aged 55+, 38% of the population) will have positive and negative implications for domestic tourism. A larger market of potential travellers with more time and more money to spend provide clear opportunities as this market can travel off-season and may favour domestic tourism. In addition, their preferences are likely to benefit domestic tourism in terms of culture, wellness, heritage, rural and more comfortable travel. However, it will be important for tourism providers to be able to meet mobility and accessibility needs and, particularly in the current climate, ensure that they can operate year-round.

4.2 Outlook for Domestic Tourism

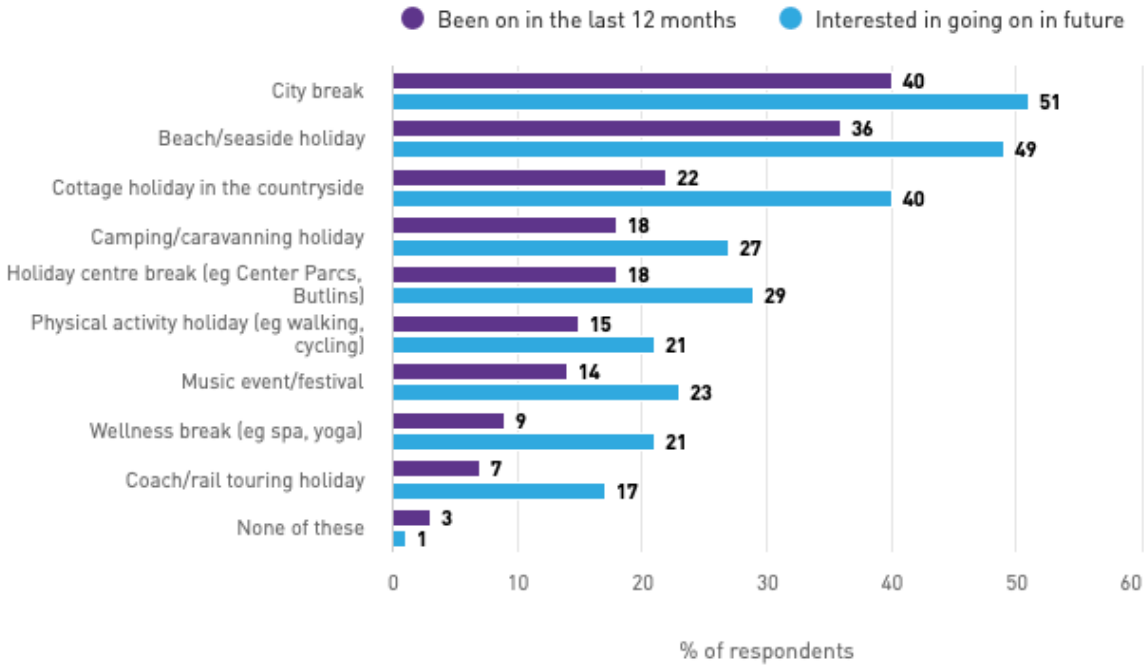
The future of domestic tourism in the UK is being shaped by several key trends that have arisen since the end of the pandemic. The major factor that is having the greatest impact on UK residents in all areas of their lives is the rising cost of living and resultant economic pressures. When it comes to travel, ongoing challenges around affordability and competition from overseas travel continue to impact choices made by the market.

Nevertheless, the future for domestic tourism in the UK remains positive:

- Almost three in five British nationals intend to take a domestic holiday in 2025 (59%), according to Mintel.
- However, YouGov found that figure to be even higher at 71%.
- Interest in beach holidays in the UK continues to endure. While city breaks (36%) and rural/countryside holidays (30%) are the top holiday types for UK residents in 2025, demand for beach holidays is rising, with 29% of travellers choosing this type for their main holiday in 2025, up from 25% in 2024.

- Intent to take a beach holiday is high and rising. 36% of research respondents took a beach/seaside holiday in the previous 12 months. However, 49% stated they were interested in taking a beach holiday at some point in the future.

Figure 4.1: Domestic Holiday Intentions 2025



Source: Mintel

- Older generations are less bothered by unfavourable weather conditions than their younger counterparts. The unpredictable UK weather would deter 53% of people aged 25-44 from booking a UK holiday, but only 33% of those aged 45-64, and 23% aged 65+.
- Families of young children are a key market for domestic short breaks. 80% of parents with children under 18 planning a UK holiday are more likely to take a short break in the UK than travel overseas.

4.3 Domestic Tourism Trends

Key trends in the domestic tourism market are further identified as follows:

4.3.1 Affordability challenges: fewer domestic holidays but spend more

Staycations have become less affordable than in previous years due to rising costs, making it harder for many consumers to justify multiple UK breaks. As a result, many are prioritising their main overseas holiday over domestic breaks. From an affordability perspective, competition from overseas destinations is expected to persist – there are many destinations that are easy and relatively cheap to reach, and less expensive once there.

Nevertheless, despite financial pressures, short breaks within the UK remain popular. Many UK adults express a preference for taking short breaks domestically rather than travelling abroad, which is positive for the domestic market. However, the trend is to take fewer domestic holidays but spend more on each trip to ensure a memorable experience.

4.3.2 Demographic variations shaping domestic tourism

Older travellers and families are expected to play a larger role in domestic tourism, seeking convenience and accessibility. The older generations are also more likely to opt for 'cool-cations' (see 5.3.5 below) and short breaks out of season. By contrast, younger consumers are driving experiential tourism, such as festivals, events and wellness breaks.

Families in the UK are key markets for domestic holidays, especially those with strong outdoor appeal like coastal destinations. Spending time together and enjoying a range of activities in a different environment are important factors for family holidays, enabling them to make memories and strengthen family bonds.

Multi-generational family trips are also more popular today as a way for family groups to spend quality time together for a holiday or special occasion. Typically, family groups book large holiday homes with several bedrooms and/or bedroom suites with good sized cooking and entertaining space. This type of accommodation is usually cheaper than a hotel, and often more personal and relaxed for all the different ages. Dogs are also important members of families these days and being able to accommodate them is a bonus feature for families.

4.3.3 Increased demand for authentic experiences

Experiential tourism, where tourists seek authentic, unique experiences that connect them more fully with the people and places they visit. Gen Y and Gen Z are key markets for this type of activity as they value experiences over things, and as avid social media users, are easy to reach and attract through social media marketing. In addition, there is plenty of evidence that older generations are increasingly keen on authentic experiences while travelling too.

Immersive experiences vary widely but typically involve close interaction between host and visitor, and are often hands-on – making, learning, tasting and so on. Back to nature experiences, like agritourism, are also becoming more popular. Wine and gin tasting, artisanal food production, cultural and heritage experiences, and personal guided tours/experiences are all examples of immersive experiences found around the UK.

Food experiences are one of the top tourism trends today. Sampling local cuisines is a key reason for travel for many tourists today, no matter where they travel to, as it provides the visitor an authentic connection with the local culture and heritage. British tourists are very interested in learning about local foods, their provenance and supporting local producers. Coastal restaurants serving locally caught seafood, farm shops selling regional specialities, vineyard tours/tastings and food festivals are key tourism drivers today and are great examples of immersive experiences.

4.3.4 Sustainability in tourism essential

Awareness of overtourism and environmental impact is growing. 41% of UK holidaymakers say recent protests about overtourism have put them off visiting certain destinations. This is prompting more travellers to seek out lesser-known, authentic, and sustainable destinations. Also referred to as 'dupes', examples in Kent could be identified as Sandwich Bay, Dungeness and Kingsdown.

In addition, travellers are becoming more demanding that the places they visit and accommodation they stay in are committed to sustainable practices that minimise harm and maximise benefits to people, places and planet. Encouraging sustainable behaviour whilst in a destination helps to highlight commitment to climate-friendly behaviour. In Copenhagen, for instance, visitors who use bikes and trains are offered a free kayak tour.

Although there continues to be a gap between what people 'say' they want compared to what they are actually prepared to 'do' and pay for, sustainability in tourism is no longer a trend but a necessity.

4.3.5 Cool-cations help to redefine seasonality and sustainability

Amongst certain market segments, there is a slow shift in holiday choices towards destinations with more moderate weather rather than places where temperatures are tending towards extreme heat. Much of the European continent has experienced extreme temperatures during the summer months over the past few years and research on Google Trends uncovered a 300% increase in the search term 'cooler holidays' compared to the same time 12 months ago.

Cool-cationing can help to enhance sustainability and address seasonality factors as travellers choose to avoid peak holidaying, travelling to places out of season which helps to mitigate against overtourism. Travelling out of season is also often cheaper which is more appealing for cash-strapped domestic tourists.

4.3.6 Demand for wellness and luxury experiences

There is a notable rise in demand for luxury domestic getaways, including beach, city, and cottage holidays. Wellness retreats and unique, high-end experiences are particularly appealing to affluent travellers. New wellness activities continue to stimulate interest such as 'grounding' or 'earthing' whereby participants put their skin in direct contact with the earth, e.g., walking barefoot on sand, earth, or mud, or walk barefoot on wild trails, and so on.

Wellness and health is transcending all tourism budgets, and outdoor activities for leisure have a close link with wellness tourism that can be harnessed for benefit. Driven by the desire to improve and maintain health, even while on holiday or a leisure break, taking part in outdoor activities like walking and cycling are popular amongst outdoor enthusiasts and these accessible and budget-friendly activities are well-known for their positive impact on health. Walking in particular is easily accessible by people of all ages and all abilities. Coastal paths and trails provide an obvious and easy route for outdoor enthusiasts.

4.3.7 Last-minute and flexible bookings provide opportunities

Unpredictable weather and financial uncertainty are driving more people to opt for last-minute bookings. Gen Y and Gen Z in particular value spontaneity and flexibility for weekend getaways and experiential travel. Meeting these needs encourages year round travel and reduces pressure on peak periods, creating opportunities for providers that can accommodate this level of flexibility.

4.3.8 Accessibility and inclusivity

With an ageing population and a large market of older tourists with varying needs, accessibility and inclusivity are key factors moving forwards. This involves recognising varying disabilities and differences but also understands that age and other needs not related to disability are also important.

4.3.9 Conclusion

Thanet Tourism is well placed to take advantage of the major tourism trends in the market today. The table below gives an indication how the trends can be exploited through the Thanet offer for each target market.

Table 4.1: Domestic Tourism Trends and Opportunities for Visit Thanet

Demographic	**Preference Trends**	**Thanet Offer**
Older generations (55+)	Convenience and accessibility Cool-cations	Year round activities/facilities Hiking, walking Heritage, culture Luxury getaways
Younger consumers (18-45)	Experiences	Festivals and events Wellness breaks – including hiking/cycling Wellness activities, e.g., earthing/grounding Wine/beer/gin tastings Food experiences Guided tours Weekend getaways
Families	Good value Strong outdoor offer	Beaches Water sports
Multi-generational groups	Facilities for large groups of different ages	Suitable accommodation Range of activities suitable for different needs

Key Insights:

- Domestic tourism in the UK is set for growth although the landscape is changing on account of financial pressures, climate change and demand for immersive experiences, flexibility and accessibility.
- Key markets for Thanet remain families and older generations and ways to attract them out of season could yield benefits.
- Gen Y and Gen Z are another key market for Thanet, attracted to the easy-to-reach coast from Kent, London and the South East, value flexibility and spontaneity.
- Sustainable actions to address climate-change, overtourism and seasonality are key tasks for Thanet.
- Food and other immersive experiences, cool-cations and wellness/health are prominent trends that offer opportunities for Thanet.