



Vattenfall Wind Power Ltd

Thanet Extension Offshore Wind Farm

Annex 4-1: Tourism and Recreation Baseline

June, 2018, Revision A

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Vattenfall Wind Power Ltd

Thanet Extension Offshore Wind Farm

Annex 4-1: Tourism and Recreation Baseline

June, 2018

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REGENERIS

Thanet Extension Offshore Wind Farm: Tourism and Recreation baseline

A Final Report by Regeneris Consulting

August 2017

Vattenfall Wind Power Ltd

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www.regeneris.co.uk

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1. Tourism and Recreation Baseline

- 1.1 This document has been prepared to underpin the preparation of the Tourism and Recreation (T&R) impact assessment for the Thanet Extension Offshore Wind Farm (in short Thanet Extension). It sets out the proposed scope of the impact assessment and provides an initial characterisation of the baseline environment in the project's impact area.

Proposed Receptors

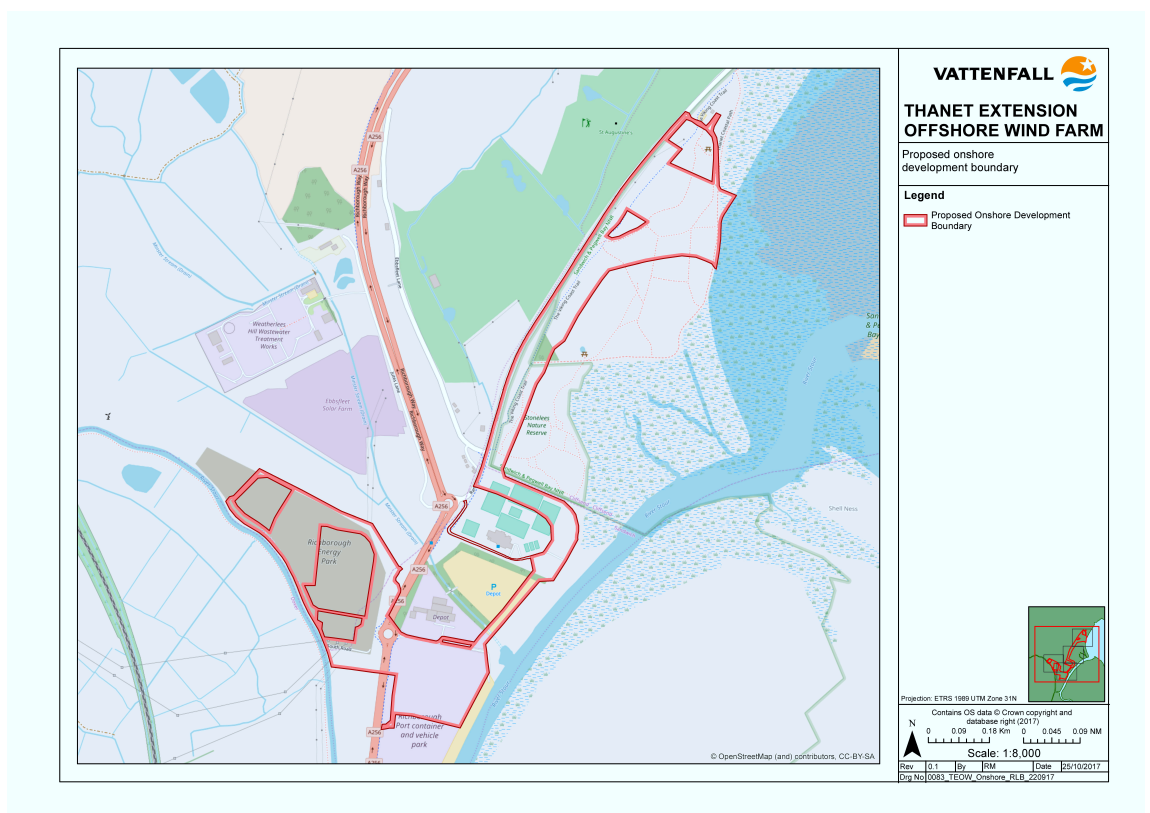
- 1.2 The assessment of T&R will explore the potential physical effects of the construction, Operations and Maintenance (O&M) and decommissioning of both onshore and offshore infrastructure on recreation and access in the study area and upon the tourism economy. In practice, this means that the assessment will:
- Identify the various physical effects that Thanet Extension could have on offshore and onshore recreation and access. This part of the assessment will encompass both offshore and onshore infrastructure;
 - Consider how any physical effects might impact on specific tourism businesses or groups of tourism businesses;
 - Explore the overall scope for these effects to lead to an impact on the volume and value of tourism activity in the impact areas.
- 1.3 In light of the scoping report's content and scoping opinion it is proposed that the following receptors are included in the Preliminary Environmental Information Report assessment of tourism and recreation effects:
- 1) **The direct effects on offshore and inshore recreational users:** this includes bathing, surfing, kite-surfing, scuba diving, recreational angling, recreational sailing and canoeing.
 - 2) **Direct effects on onshore recreational and utility users as a result of loss of amenity land:** this includes a range of uses including but not limited to bait digging / collection, walkers, horse riders, cyclists, carriage drivers, commuters, dog-walkers, runners and recreational users of the river.

- 3) **Direct effects on onshore recreational and utility users as a result of closure or diversion of Public Right of Way (PRoW) or permissive routes:** affected users could include walkers, horse riders, cyclists, carriage drivers, commuters, dog-walkers, runners and recreational users of the river.
- 4) **Direct effects on onshore recreational users as a result of disruption to tourism assets and attractions:** this could include particular tourism assets and attractions not included in 2) and 3) above.
- 5) **Indirect effects on onshore and offshore users of recreational and tourism resources:** in addition to the direct effects on the various onshore and offshore users, the T&R chapter will also need to consider a range of indirect effects. In particular, it will need to consider the extent to which noise, traffic, dust and visual impacts could discourage visits to the area or impact upon the amenity value of particular resources.
- 6) **Effects on the tourism economy:** encompassing all of the impacts above, the assessment will need to explore the extent of such effects on the tourism economy. This would need to be determined by both physical effects and the wider zone of visual impact.

Study Area

- 1.4 There are four main study areas which will be relevant for the assessment of tourism and recreation impacts:
- Direct offshore effects of Thanet Extension will focus on a study area encompassing the area of the offshore wind farm itself during the operational phase, and extended to include the construction buffer zone during construction and decommissioning phases.
 - Direct onshore effects of Thanet Extension will focus on a study area covering a one km buffer around the Pegwell Bay landfall and cable route illustrated at Figure 1.1.

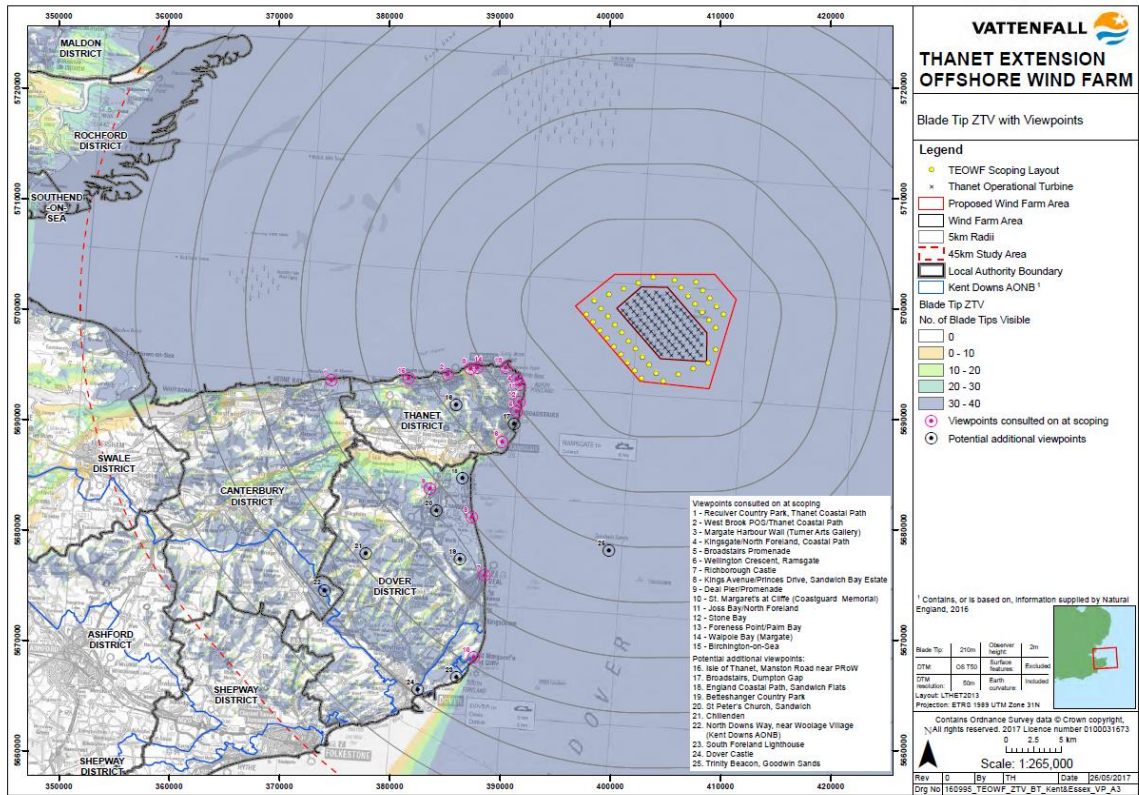
Figure 1.1 Proposed Cable Landfall Location



Source: Thanet Extension EIA Report to Inform Scoping

- Indirect effects will be based on the Zone of Theoretical Visibility (ZTV), extending 45 km out from the area of the proposed development. Within this area, consideration will need to be given to the potential impacts where the project is perceptible, as well as potential impacts on T&R activities associated with physical obstruction, airborne and subsea noise, suspended sediments, traffic etc.

Figure 1.2 Zone of Theoretical Visibility



Source: Vattenfall

- Effects on the tourism economy will focus on the primary land area within the ZTV, which includes the local authority areas of Thanet, Canterbury and Dover. Although there are other areas at the outer reaches of the ZTV area, any impacts at this distance (all over 35km from the proposed development) are not expected to be significant.

Figure 1.3 Local Authorities of Thanet, Canterbury and Dover



Source: Regeneris Consulting

Table 1.1 Impact areas for each of the receptors identified for Thanet Extension

Receptors	Impact Area
1. The direct effects on offshore and inshore recreational users	Wind Farm Area and Construction Buffer Zone
2. Direct effects on onshore recreational and utility users as a result of loss of amenity land	One km buffer around landfall option.
3. Direct effects on onshore recreational and utility users as a result of closure or diversion of PRow or permissive routes	
4. Direct effects on onshore recreational users as a result of disruption to tourism assets and attractions	
5. Indirect effects on onshore and offshore users of recreational and tourism resources	Zone of Theoretical Visibility
6. Effects on the tourism economy	Thanet, Canterbury and Dover Districts

- 1.5 This report sets out the known recreational facilities and activities that may be affected by the proposed development. It focuses on the publicly accessible resources within the study area, but also includes activities that take place inshore at Pegwell Bay and on / in the river Stour.
- 1.6 The report excludes formal recreation requiring dedicated facilities, such as football or cricket pitches, instead concentrating on informal activities – some of which may be commercially organised. The report will cover commuting and access to facilities on PRow. However, recreational use of the metalled highway, such as road cycling, will be covered in the Transport chapter.

Statutory and Policy Context

Tourism and Recreation Statutory Context

- 1.7 The informal recreation that we are considering takes place on publicly accessible land and water. It is subject to several key pieces of legislation but, for the purpose of this study, the main Acts are:
- National Parks & Access to the Countryside Act 1949 (NPACA49);
 - Highways Act 1980 (HA80);
 - Wildlife and Countryside Act 1981 (WACA81);
 - Road Traffic Regulation Act 1984 (RTRA84);
 - Countryside & Rights of Way Act 2000 (CROW);
 - Planning Act 2008 (PA08); and
 - Marine & Coastal Access Act 2009 (MACA09).
- 1.8 National planning policies of relevance to recreation include:
- National Planning Policy Framework (NPPF); and
 - National Policy Statement for Energy (NPS EN1).

1.9 Several local planning policies are also relevant to this chapter and the following policy documents have been considered:

- Thanet District Council – Open Space, Sport and Recreation Assessment 2005;
- Thanet District Transport Plan 2005-11 (appears to be most up to date available);
- Thanet Cycling Plan (Dec 2003);
- Feet First Strategy (Feb 2005);
- Draft Thanet Local Plan to 2031 Preferred options Consultation January 2015;
- Dover District Local Development Framework Core Strategy (Adopted Feb 2010);
- Dover District Council Parks and Amenity Open Space Strategy (Oct 2013); and
- Countryside and Coastal Access Improvement Plan 2013-2017.

1.10 The most important single document for consideration with respect to countryside access is Kent County Council’s ‘Countryside and Coastal Access Improvement Plan’. This is Kent’s version of a ‘Rights of Way Improvement Plan’ (ROWIP). ROWIP are required to be drawn up by each Local Highway Authority (LHA) under CROW. The ROWIP is the result of extensive consultation and also consideration of all relevant local policies, including those covering Thanet and Dover districts. To avoid unnecessary repetition, only the key policies from the ROWIP will be reproduced in Table 1.2 below.

Policy / legislation	Key provisions	Relevance to T&R Assessment
NPACA49	<ul style="list-style-type: none">• Part III – Nature Conservation• Part IV – Public Rights of Way (Long-distance routes)	<ul style="list-style-type: none">• Part III enabled the setting up of local and national nature reserves.• Part IV provided the mechanism for the creation

Policy / legislation	Key provisions	Relevance to T&R Assessment
	<ul style="list-style-type: none"> • Part V – Access to Open Country 	<ul style="list-style-type: none"> of long-distance routes, which are now more commonly known as ‘National Trails’. • Part V enabled the provision of access to open land through access agreements or access orders. This part also provided a mechanism for the acquisition of land for access purposes. • The above parts have played an important role is the establishment of many of the access resources that may be affected by the proposed development.
HA80	<ul style="list-style-type: none"> • s.130 Protection of public rights • s.131 Penalty for damaging highway etc. 	<ul style="list-style-type: none"> • This Act has the effect of prohibiting any works affecting PRow without the local highway authority’s consent.
WACA81	<ul style="list-style-type: none"> • ss.35 & 36 National Nature Reserves (NNR) & Marine Nature Reserves • s.60 Regulation of traffic on PRow 	<ul style="list-style-type: none"> • A key recreation asset is the Pegwell Bay NNR. • s.60 clarified that users of PRow are covered by RTRA84 (as a successor Act to the RTRA 1967).
RTRA84	<ul style="list-style-type: none"> • s.14 Temporary prohibition or restriction on roads 	<ul style="list-style-type: none"> • This provision will be needed to enable

Policy / legislation	Key provisions	Relevance to T&R Assessment
		development that crosses or follows PRoW.
CROW	<ul style="list-style-type: none">• Part I – Access to the countryside• Part II – Rights of Way Improvement Plans	<ul style="list-style-type: none">• Part I established the concept of Access Land.• Part II stipulated that local highway authorities must draw up a ROWIP and regularly review it. Kent County Council’s (KCC) ROWIP is called its ‘Countryside and Coastal Access Improvement Plan’ and is reviewed in this table.
PA08	<ul style="list-style-type: none">• s.136 PRoW	<ul style="list-style-type: none">• This section allows PRoW that are not vehicular highways (i.e. not byways) to be stopped up, provided that an alternative route is provided (or is not needed).
MACA09	<ul style="list-style-type: none">• Part 9 Coastal Access	<ul style="list-style-type: none">• Provisions under this part of the Act place a duty on Natural England to create the England Coast Path National Trail (ECP) and accompanying ‘coastal margin’.
NPS EN1	<ul style="list-style-type: none">• 5.10.2 The Government’s policy is to ensure there is adequate provision of high quality open space	<ul style="list-style-type: none">• This policy reflects the general importance that is placed on the provision of high quality, public, open

Policy / legislation	Key provisions	Relevance to T&R Assessment
	<p>(including green infrastructure) and sports and recreation facilities to meet the needs of local communities. Open spaces, sports and recreational facilities all help to underpin people’s quality of life and have a vital role to play in promoting healthy living. Green infrastructure in particular will also play an increasingly important role in mitigating or adapting to the impacts of climate change.</p>	<p>space. From this, it is understood that any diminution of access to open space, whether in time or extent, is to be avoided as far as is possible. This is a fundamental principle throughout this report.</p>
NPS EN1	<ul style="list-style-type: none">• 5.10.6 Applicants will need to consult the local community on their proposals to build on open space, sports or recreational buildings and land. Taking account of the consultations, applicants should consider providing new or additional open space including green infrastructure, sport or recreation facilities, to substitute for any losses as a result of their proposal.	<ul style="list-style-type: none">• Community consultation is considered in the Consultation & Scoping section below.

Policy / legislation	Key provisions	Relevance to T&R Assessment
NPS EN1	<ul style="list-style-type: none">5.10.20 Where green infrastructure is affected, the Infrastructure Planning Commission (IPC) should consider imposing requirements to ensure the connectivity of the green infrastructure network is maintained in the vicinity of the development and that any necessary works are undertaken, where possible, to mitigate any adverse impact and, where appropriate, to improve that network and other areas of open space including appropriate access to new coastal access routes.	<ul style="list-style-type: none">This policy will guide the planning of works and the consideration of mitigation and possible enhancements in the Environmental Statement (ES) and PEIR.
NPS EN1	<ul style="list-style-type: none">5.10.24 Rights of way, National Trails and other rights of access to land are important recreational facilities for example for walkers, cyclists and horse riders. The IPC should expect applicants to take appropriate mitigation measures to address adverse effects on coastal access, National Trails and	<ul style="list-style-type: none">This policy is fundamental to the purpose of this report and has been a material consideration throughout.

Policy / legislation	Key provisions	Relevance to T&R Assessment
	<p>other rights of way. Where this is not the case the IPC should consider what appropriate mitigation requirements might be attached to any grant of development consent.</p>	
NPS EN1	<ul style="list-style-type: none">• 5.12.3 This assessment should consider all relevant socio-economic effects which may include effects on tourism	
NPPF	<ul style="list-style-type: none">• 75. Planning policies should protect and enhance PRoW and access. Local authorities should seek opportunities to provide better facilities for users, for example by adding links to existing rights of way networks including National Trails.	<ul style="list-style-type: none">• This provision will be addressed in consideration of the Kent Countryside and Coastal Access Plan as part of the assessment.
NPPF	<ul style="list-style-type: none">• 114. Local planning authorities should:• set out a strategic approach in their local plans, planning positively for the creation, protection, enhancement and management of networks of biodiversity and green infrastructure; and maintain the character of	<ul style="list-style-type: none">• This provision will be addressed in consideration of the Dover and Thanet Districts plans in the assessment.

Policy / legislation	Key provisions	Relevance to T&R Assessment
	<p>the undeveloped coast, protecting and enhancing its distinctive landscapes, particularly in areas defined as Heritage Coast, and improve public access to and enjoyment of the coast.</p>	
Countryside & Coastal Access Improvement Plan	<ul style="list-style-type: none">• M3 - Officers will proactively seek opportunities to improve the accessibility of the network• D2 - Secure the protection and enhancement of the access estate through commenting on and influencing, emerging planning policy documents and planning applications that may impact on access to green space and the Public Rights of Way network.• N4 - Work closely with Natural England to establish the English National Coastal Trail and other routes requested by communities.• ST6 - Effectively manage resources through prioritising popular routes	<ul style="list-style-type: none">• These policies will guide the LHA's approach to and expectations from the proposed development. They will be particularly important with respect to consideration of mitigation and possible enhancements in the PEIR and ES

Policy / legislation	Key provisions	Relevance to T&R Assessment
	and routes where public safety is at risk. <ul style="list-style-type: none"><li data-bbox="480 427 935 732">• E4 - Aim to deliver wider environmental benefits through the delivery of improvement schemes using guidance included within the Good Design Guide.	

1.11 There is no nationally approved method for undertaking a baseline study of informal access and recreation, however, there are a number of standards relating to aspects of PRow and access land. These are:

- British Standard for Gaps, Gates and Stiles BS709:2006 – This standard is about ensuring the least restrictive access infrastructure is used in any given situation, and ensuring that the access provided is adequately maintained. The standard sets out minimum dimensions for structures and a hierarchy for their use; Gaps>Gates>Kissing Gates>Stiles. Note that stiles should only be used in exceptional circumstances.
- Countryside for All – First published as the ‘BT Countryside for All Good Practice Guide’ in 1997, this guide is maintained by the Fieldfare Trust and is now known as ‘A Good Practice Guide to Countryside Access for Disabled People’. The guide presents a benchmark of best practice for the provision of countryside access for disabled people, helping to ensure compliance with the requirements of the Equality Act 2010.
- Best Value Performance Indicator 178 (BVPI178) – BVPI178 was developed by the Audit Commission as part of a suite of performance indicators for local government known as the Comprehensive Performance Assessment. BVPI178 is now redundant for its original purpose but is still used by some local highway authorities as the only national comparator for management of PRow networks. Individual paths were assessed for ease of use by the public. ‘Easy to use’ means that: the path is free from unlawful obstructions;

the surface and lawful barriers are in good repair and to a satisfactory standard; and paths are signed where they leave a metalled road. Although no longer carrying official weight, the 'easy to use' standard is a useful way of determining that a path is of an adequate standard for public use.

1.12 The Thanet coast is covered by a number of user codes including those covering:

- Bait digging;
- Horse riding;
- Marine wildlife watching;
- Powercraft activities;
- Shellfish harvesting;
- Shore angling;
- Thanet dog-walking code;
- Wind-powered activities; and
- Sandwich and Pegwell Bay kite-surfing agreement.

Tourism and Recreation Policy Context

1.13 In 2015, the newly elected Conservative Government launched a 'Five Point Plan'¹ backing the tourism sector and encouraging the sector's benefits to be felt across the whole country (rather than focusing primarily on London). The following is an overview of five key points identified in the action plan:

- 1) **Tourism landscape:** this sets out the government's ambition to strengthen co-ordination and collaboration of the tourism offers and their promotion.
- 2) **Skills and jobs:** boost apprenticeships and attracting more people to careers in tourism. The tourism sector supports around one-in-ten jobs nationally, and evidence shows that the sector was growing at twice the national average.

¹ HM Government (2015), 'Backing the Tourism Sector – A Five Point Plan'.

- 3) **Common sense regulation:** examine the scope for deregulation and cut the domestic regulation burden on businesses, with the government promising to keep its regulatory framework under review to ensure that common sense prevails and that no opportunities are missed to protect and grow the tourism sector.
 - 4) **Transport:** make it easier for visitor to explore the country by rail, bus and coach. The action plan highlights that it is difficult to think of the tourism industry without thinking about transport.
 - 5) **A GREAT welcome:** working with the UK Border Agency to ensure that standards are maintained and people are processed efficiently and with a smile, whilst also driving continuous improvements in the UK's visa service.
- 1.14 Following the EU referendum in June 2016, the government updated the 'Tourism Action Plan'² to reflect some of the new challenges and opportunities Brexit would bring, especially a reduction in red tape (excessive bureaucracy), whilst also forging new partnerships in upcoming and developing markets. Furthermore, this update sought to work with the emerging Industrial Strategy to ensure that the tourism sector is more internationally competitive and resilient, whilst also ensuring that its growth delivers for everyone.
- 1.15 Despite the update, the Tourism Action Plan maintained the key points identified a year earlier, and encouraged a collaborative approach between the country's devolved administrations, tourism bodies and the wider industry to ensure that growth in the sector generates opportunities for everyone up and down the country.
- At the local level the Economic Growth Strategy for Thanet³ indicates that the district is home to a number of tourism-related assets some of which include heritage assets and distinctive Georgian and Regency architecture. Whilst acknowledging the role the sector plays locally, the Strategy suggests that seaside tourism is facing a number of challenges associated with low pay and seasonality. The Strategy identifies investment in the tourism sector over the

² HM Government (August 2016), 'Tourism Action Plan'.

³ Thanet District Council (November 2016), 'Economic Growth Strategy for Thanet'.

past few years as one of the key weaknesses seen locally, especially since recent growth in private investment needs additional support and requires further development. Furthermore, the strategy points out that hotels are at capacity during peak times, and argues that there is lack of high quality accommodation locally.

Consultation and Scoping

1.16 The principal statutory consultees with respect to informal recreation in the study area are:

- Natural England (NE - responsible for the establishment of the England Coast Path National Trail);
- Kent County Council (the LHA with responsibility for PRow, also the registration authority for commons and for Town & Village Greens. Furthermore, KCC owns and manages Pegwell Bay Country Park);
- Thanet District Council and Dover District Council;
- Sandwich Port and Haven Commissioners (The SPHC are responsible for licensing boats on the River Stour); and
- Environment Agency (The EA's remit includes fisheries management on the River Stour).

1.17 The main non-statutory consultees are:

- Sustrans (The sustainable transport charity that manages the National Cycle Network, including NCN route 1 and Regional route 15 – also known as the Viking Trail);
- The Ramblers
- Open Spaces Society

1.18 For this baseline report, consultation has been carried out with representatives of:

- Natural England (NE)
- Kent County Council (KCC)
- Thanet District Council (TDC)
- Dover District Council
- Sustrans
- The Thanet Coast Project
- Environment Agency
- Sandwich Port and Haven Commissioners

1.19 Consultation with the above organisations has been by means of a telephone call followed up, where appropriate, by a consultation letter and follow-up emails.

1.20 In addition to the above, there are key local stakeholders and special interest groups, covering both onshore and inshore recreation and tourism which will be consulted as part of the assessment. These will include:

- Economic development officers in the South East LEP, Kent County Council, local authorities for Thanet, Canterbury and Dover, and local tourism sector bodies; and
- Recreation groups relating to offshore and inshore recreation, including relating to bathing, surfing, kite-surfing, scuba diving, recreational angling, recreational sailing, canoeing, bait digging / collection, walkers, horse riders, cyclists, carriage drivers, commuters, dog-walkers, runners and recreational users of the river.

1.21 The PINS scoping opinion was brief in its consideration of PRow, green infrastructure and recreation. The opinion says that:

- “3.109 A number of the identified viewpoints are from public rights of way and other recreational areas and the SoS would expect the interrelationship between the SLVIA and the assessment of tourism and recreational impacts to be considered (Section 4.3 of the Scoping Report under ‘wider scheme

aspects'). The SoS also notes the omission of the England Coast Path from the list of key walking routes identified."

- "3.203 Paragraph 946 of the Scoping Report states that the spatial scope of the construction noise assessment would be "400m from the cable corridor routes where significant activities could affect noise sensitive receptors. The ES should clearly set out what 'significant activities' would comprise, and should include for potential recreational users of PRow."
- "3.233 The SoS welcomes the proposed tourism and recreation assessment. The Applicant should agree the baseline and methodology with the relevant local authorities, the LEP and other key stakeholders including but not limited NE and Historic England. KCC have identified a number of attractions that they believe should be included in the assessment (see Appendix 3 of this Opinion). Furthermore, they note that the assessment should include recreational uses of the river and the Secretary of State agrees with this."

1.22 The table below summarises specific consultations that have fed in to the characterisation of the existing environment.

Table 1.3 Summary of consultation relating to recreation		
Date and consultation phase / type	Consultation and key issues raised	Response to consultation comments
20/04/17 Baseline information gathering	Natural England – Email correspondence. No usage data is available for the ECP in the study area.	N/A
10/05/17 Baseline Report	Natural England – Email letter reviewing method and results to date and asking for omissions or comments. No further information supplied or comments made.	N/A
18/04/17 Baseline information gathering	Kent County Council (Rights of Way) – Telephone call and follow-up email seeking information. Data supplied for a people counter on path TR15 for 2013 and 2014. Maps also supplied showing: Promoted Routes, Public Rights of Way, Cycle Routes and The England Coastal Path all within the corridor.	Information used in baseline characterisation
10/05/17 Baseline Report	Kent County Council (Rights of Way) – Telephone call followed by an email letter reviewing method and results to date and asking for omissions or comments.	Information used in baseline characterisation

Date and consultation phase / type	Consultation and key issues raised	Response to consultation comments
	Response received pointing to the Countryside and Coastal Access Improvement Plan.	
18/4/17 Baseline information gathering	Kent County Council (Country Parks) – Telephone call and email requesting information about usage of Pegwell Bay Country Park. Data supplied.	Information used in baseline characterisation
21/4/17 Baseline information gathering	Kent County Council (Transport Planning) – Data supplied for a cycle counter sited on the A256 near Richborough Port.	Information used in baseline characterisation
09/05/17 Baseline Report	Thanet District Council - Telephone call followed by an email letter reviewing method and results to date and asking for omissions or comments. No comments made but suggestion to contact the Thanet Coast Project	N/A
10/05/17 Baseline Report	Dover District Council – Telephone call made seeking someone to consult with, but no information was offered.	N/A
18/04/17 Baseline information gathering	Sustrans – Telephone call seeking user data and information about key routes. Advice received that the Viking Coastal Trail in the study area does not have counters run by Sustrans.	N/A
10/05/17 Baseline Report	Thanet Coast Project (TCP) – Email letter reviewing method and results to date	Information used in baseline characterisation

Date and consultation phase / type	Consultation and key issues raised	Response to consultation comments
	and asking for omissions, comments and further data. TCP suggested a number of possible data sources and made reference to several coastal user codes.	
23/05/17 Baseline information gathering	Environment Agency (EA) – Telephone call seeking information about angling on the Stour. EA issues rod licences but most fishing is privately let and further membership / licences are needed.	Information used in baseline characterisation
23/05/17 Baseline information gathering	Sandwich Port and Haven Commissioners – Telephone call to the Harbour Master seeking information about boat use.	Information used in baseline characterisation

Baseline Environment

1.23 This section provides an initial characterisation of the baseline environment for the T&R assessment. This is broken down to cover onshore recreation, offshore and inshore recreation, and tourism.

Existing Environment: Onshore Recreation

1.24 Baseline data searches have been carried out under the following headings:

- Desk study:
 - Review of Ordnance Survey (OS) Explorer sheet map 150 at 1:25,000 scale
 - Review of the Kent Landscape Interactive Map (<http://webapps.kent.gov.uk/KCC.KLIS.Web.Sites.Public/ViewMap.aspx>).
 - Telephone data searches to: Natural England; Kent CC (PRoW and Country Parks); and Sustrans
 - Review of policy documents
 - Internet searches: Interrogation of Defra's 'MAGIC' website; searches for resources and potential receptors using the Google search engine
 - Aerial photography and 'Streetview' via Google maps
- Walkover surveys. These were conducted on 13 April 2017.

1.25 The desk study was used to plan the walkover survey to ensure that items of potential significance were seen. A route was plotted to ensure coverage of as many items as possible within the available time.

1.26 During the survey itself, all items of interest were photographed and their location plotted using a hand-held GPS unit. Attributes were recorded, where appropriate, using a standard recording form that also acted as an aide-memoire at each site. The survey enabled:

- The verification of features as shown on the map or internet searches;
- Identification of additional features not picked up during the desk study – or which could lead to further desk study; and
- Observations of the levels of public uses of specific resources. Where people were not seen on a resource during the survey, level of use was tentatively estimated from indications of use on site, for example, well-worn paths or polished stile rails. (It will be appreciated that it is difficult to infer levels of use on sealed tracks or on non-wearing resources such as the River Stour or the sea.)

1.27 As well as numbers of users, the survey allowed observation of the types of usage being made of resources.

1.28 The table below summarises the range of resources which could potentially be affected by the cable run from Pegwell Bay.

Resource	Description
TR15	Public footpath, part of Thanet Coastal Path and ECP. Heavily used.
TR11	Public bridleway across playing field (Marjorie Chapman Meadow). Heavily used. Largely enclosed by residential areas.
Little Cliffsend Farm	Several permissive paths use roadways around the farm. Several small groups were seen using the paths suggesting that use is frequent.
TR32	A cross-field route that shows clearly on satellite imagery. Heavily used public path heading north from Cottington Road, Cliffs End.
TR33	Heavily used public footpath from Sandwich Road, near the Viking Ship, to the shore.

Resource	Description
RR15	<p>Sustrans Regional Route 15, the Viking Coastal Trail. Promoted as a multi-user trail for walkers and cyclists, describing a loop around the Isle of Thanet.</p> <p>The route follows close beside the Sandwich Road and Ramsgate Road, providing an access route to the Viking Ship picnic site, Pegwell Bay Country Park and the Stonelees Nature Reserve (abutting the Country Park).</p> <p>Observations during the survey suggest that the cycle route is heavily used, with 30 - 50 cyclists per hour and similar numbers of walkers. Sustrans' Regional Manager, during consultation, suggested there are 100,000 – 200,000 users per annum.</p> <p>A cycle-traffic counter operated by Kent CC recorded 34,300 cycle movements during 183 days of recording between 1/1/16 and 15/9/16. This suggests annual cycle trips totalling about 67,000. (as only cyclists were counted, not pedestrians, this record fits well with the Sustrans' RM estimate).</p>
Thanet Coastal Path	<p>This promoted walking route follows a permissive route from the southern end of Pegwell Bay CP until it joins TR15 at the northern end of Pegwell Bay. The route is heavily used and is a mixture of stretches of tarmac and planings paths.</p>
England Coast Path	<p>The England Coast Path National Trail follows the Thanet Coastal Path around Pegwell Bay from TR15 southwards. At the southern end of the Country Park, the 'Alternative ECP' heads west to join the RR15 alongside Sandwich Road. The designated ECP route carries on due south but becomes less and less well defined before becoming impassable near to the River Stour at the northern end of Richborough Port.</p> <p>The ECP (on the Alternative route) is heavily used, although it is not possible to say what proportion of users are following which of the several assets in this vicinity.</p>

Resource	Description
TE39	Public footpath leading west-north-west from the bottom of the embanked section of the busy A256 to join TE37 at the railway. The path is moderately used as it is part of a circular walk when combined with Brook Lane and Ebbsfleet Lane North.
TE37	Public footpath that runs alongside the railway from Cliffsend to Minster. In the study area, the path is also a vehicle access route and so it is difficult to tell what level of use it receives.
EE42	Public footpath – part of the Saxon Shore Way, closely following the right bank of the River Stour. The path appears to be moderately well used.
TE26	Public footpath. This path follows the left bank of the River Stour from Pluck’s Gutter to just west of the Onshore Substation Aol. The path within the study area is lightly to rarely used and is completely blocked about 50m west of the railbridge.
Viking Ship Picnic Site	This open grassland area has parking, toilets, a small café and children’s play equipment – as well as a replica Viking ship. The site is seasonally heavily used and this is reflected in the café only being open from 1 st April to 30 th September each year. About 40 people were at the site during the survey and advice from the café manager was that this was a quiet day. It is expected that usage would be very heavy during summer school holidays.
St. Augustine’s Cross and Well	This small, Historic England site has a layby for two cars only. The site is well maintained and has interpretive plaques and board. However, it is considered that visits to the site will only be light to moderate as the site itself does not lead on anywhere. As such, visitors are likely to be those with a strong historical interest.
Pegwell Bay Country Park	Pegwell Bay CP is a popular venue with a number of facilities including seats, a bird hide and toilets. The park has several tracks around it and is used weekly for ‘ParkRun’ events. Information from Kent CC shows that 46,195 parking tickets were sold during 2016, which the park’s management suggests equates to about 115,500 visits (at 2.5 occupants per car). The monthly

Resource	Description
	breakdown shows year-round use, but with higher numbers in the summer than the winter. Tickets issued varied from a low 2,483 in December to a high of 5,222 in August, with an average monthly figure of 3,850 tickets sold, suggesting an average of 9,600 visitors per month or 320 per day.
Stonelees Nature Reserve	Stonelees is continuous with the southern end of the Pegwell Bay CP and access to the reserve is through the park. Well-worn paths around the reserve, including the ECP, suggest that use is heavy.
Pegwell Bay	<p>The northern part of Pegwell Bay gets occasional use for kite-surfing lessons. Internet searches suggest that it also gets occasional use by kite-surfers outside of lessons. However, the negative comments about conditions posted on several internet forums suggest that such use will be occasional.</p> <p>There are regular guided canoe safaris across the Bay. These are run every weekend and daily during summer holiday periods. It is probable that there are also independent canoeists using the Bay during the summer months, but no evidence has been found to determine numbers.</p>

- 1.29 It is noteworthy that nearly all of the PRow surveyed are well maintained, well-signed and free from obstructions, that is, they would score as 'pass' under BVPI178. The only two exceptions found were the eastern end of TE26 and the Richborough Port section of the ECP.
- 1.30 No registered commons or 'Town or Village Greens' (TVG) were found within the study area.
- 1.31 In the event that the project does not go ahead, there are no other obvious development pressures that would be expected to significantly change conditions within the study area.
- 1.32 Nearly all of the resources identified appear to be heavily used; however, they all seem to be operating within their carrying capacity, aided by good levels of maintenance. It is very unlikely that the proposed development would cause any of the resources to pass a tipping point resulting in their degradation.

Existing Environment: Offshore Recreation

1.33 The following sources of information have been consulted throughout this report:

- Visit Thanet (<http://www.visitthanet.co.uk>);
- Visit Kent (<http://www.visitkent.co.uk>);
- UK Beach Guide (<https://ukbeaches.guide>);
- Thanet Coast (<https://thanetcoast.org.uk>);
- North East Kent European Marine Management Scheme 2001 and 2007; and
- Google Earth.

1.34 The following recreation and tourism receptors are relevant to the offshore environment and will be considered individually in turn.

- Bathing;
- Surfing;
- Kite-surfing;
- Scuba Diving;
- Recreational Angling;
- Recreational Sailing;
- Canoeing; and
- Bait digging / collecting.

Bathing

1.35 Bathing is a popular recreational activity along the South-East coast due to an array of sandy bays within the study area and in the immediate surrounding areas. Main use of bathing waters is predominantly in spring and summer during March to November with peak activity during the school summer holidays with suggested numbers exceeding 1000 individuals on a fine day⁴. Beaches which are notable to tourists include Viking Bay, Ramsgate Main Sands, Pegwell Bay, Stone Bay, Joss Bay, Kingsgate Bay and Botany Bay. The nearest bathing water beaches to Thanet Extension are Kingsgate Bay and Joss Bay.

Figure 1.4 Main Bathing Beaches



Source: GoBe Consultants

4 Thanet Coast. (2007a). North East Kent European Sites Management Scheme 2007 – 2012. Shore Base Recreation. [Online] Available at: <http://www.thanetcoast.org.uk/factfile/ne-kent-mpa-management-scheme/management-scheme-2007-to-2012/>. [Accessed 3rd May 2017]

1.36 With respect to beach use, the Blue Flag⁵ award is an internationally recognised designation which will attract tourist to beaches in the area. Blue Flag beaches are designated at the following locations:

- Ramsgate Main Sands;
- Botany Bay; and
- Stone Bay.

1.37 Also, related to good bathing status is that of the Bathing Water Directive (76/160/EEC) which is EU legislation to help safeguard public health in relation to clean bathing waters. Beaches that have been awarded the highest level of bathing status include Stone Bay, Joss Bay and Botany Bay. Ramsgate Main Sands has a status of 'good'. Other bathing areas which are rated not as highly include Viking Bay which has a 'sufficient'. As is the case of the Blue Flag beaches, locations that are designated as clean bathing waters are likely to attract tourists to the beaches in that area⁶.

1.38 Swim clubs such as Kent Sea Swimmers have previously organised informal social group swim events from Ramsgate Main Sands and other surrounding beaches in the South East coastal area.

⁵ Blue Flag. (2017). Blue Flag Awarded Beaches. [Online] Available at: <http://www.blueflag.global/beaches/> [Accessed 2nd May 2017].

⁶ Environment Agency. (2017). Bathing Water Quality. [Online] Available at: <http://environment.data.gov.uk/bwq/profiles/> [Accessed 3rd May 2017].

Surfing

- 1.39 The good bathing waters within the study area are attractive for many water sports including surfing for which Thanet is a centre for the sport due to the poor surf conditions in other areas of Kent⁷.
- 1.40 There are two surf clubs within the Thanet area, Thanet Tourism awarded Kent Surf School located at Viking Bay Beach and Joss Bay Surf School located in Joss Bay. Both schools offer other water sports facilities including paddle boarding, kayak hire and bodyboarding. Joss Bay Surf School are open all year and Kent Surf School open April to September seven days a week, weekends during October and every day during the school holidays. Other surf locations include Ramsgate harbour wall, occasionally Ramsgate cliffs, East Cliff and Botany Bay
- 1.41 Surfing can only occur during suitable weather conditions which allow for surf and swell with the best time of the year being autumn – winter but with frequency of activity occurring summer to autumn. Numbers have previously been recorded as being up to 50 surfers in the water at any one time with approximately 300 regular users for the given bays; this excludes club numbers⁷.
- 1.42 Windsurfing is also a popular watersport activity in Thanet with a designated club in Minnis Bay which is located on the northerly stretches of the coast. Other popular spots for windsurfing include Ramsgate Main Sands, Pegwell Bay⁸.
- 1.43 Kite-surfing also occurs within the coastal areas of Thanet with Kent Kite Surfing School operating at Pegwell Bay. Beaches in Margate are also used for kite-surfing.
- 1.44 Other water based powered craft for use in water sports that are known to occur within the Thanet area include speedboats and water-skiing. There are clubs

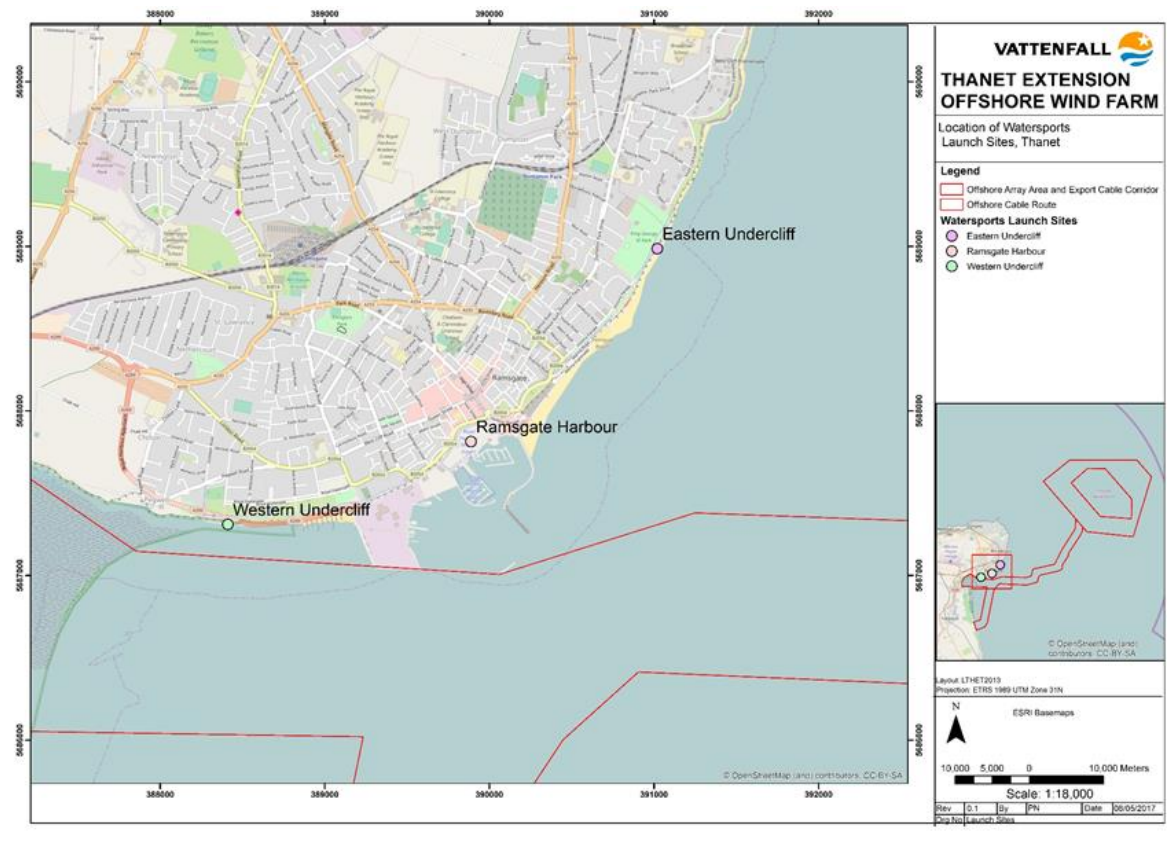
7 Thanet Coast. (2007b). North East Ken European Sites Management Scheme 2007 – 2012. Water Base Recreation. [Online] Available at: <http://www.thanetcoast.org.uk/factfile/ne-kent-mpa-management-scheme/management-scheme-2007-to-2012/>. [Accessed 3rd May 2017]

8 The Beach Guide. (2017). Kent Beaches. [Online]. Available at: <https://www.thebeachguide.co.uk/south-east-england/kent/>. [Accessed 3rd May 2017]

available in Broadstairs and Margate. These activities tend to occur mainly in Spring and Autumn. Water based crafts for use of water sports can be launched from a number of facilities along the Thanet and Dover coast, the closest to the landfall being (Figure 1.5):

- Ramsgate Harbour;
- Eastern Undercliff, Ramsgate - for powered watercraft e.g. Jet Ski, Jet Bikes, wet bikes; and
- Western Undercliff, Ramsgate - for Sail Craft and Fishing Boats.

Figure 1.5 Launching Bases for Water Sports Crafts



Source: GoBe Consultants

Scuba Diving

- 1.45 Diving is known to occur in Thanet with reported numbers being between 7-12 visitors to Thanet over 12 months in the most recent report⁹, this is below the average of diver site visits in England which is between 17-28 visits a year. However, it is likely club members will explore other areas of the South-East coast such as Deal, Dover and Folkestone with numbers being considerably higher in these areas with an upper limit being 93 individuals collectively across the three areas, due to the presence of shipwrecks which are at an attractive and accessible diving depth^{7,10}. Thanet Coast document up to half a dozen divers per diving launch, two to three times a week during the period of May to October⁷. The Dover Strait is a notable popular diving site and Ramsgate offers easy access to the area. The TOWF Environmental Statement 'Marine Archaeology' locate several wrecks in the area.
- 1.46 There is one scuba club in Ramsgate and a further two located in Margate. Ramsgate is popular for diving wreck sites due to its ease of access to the Dover Strait. The dive companies offer dive training and dive trips. Diving will only occur in good weather conditions which is usually from May to October and does not tend to occur within the marine cSAC due to water turbidity.

Recreational Angling

- 1.47 Recreational angling using a rod and line can be separated into two distinct forms, shore fishing and boat fishing, with levels of activity dependent on the seasonality and availability of target species.
- 1.48 At a regional scale the recreational sea fisheries within the Kent and Essex Inshore Fisheries and Conservation Authority (IFCA) district are a valuable asset to the economy of the region, encouraging spending on tourism and leisure as well as supporting a fleet of over 67 charter vessels.

⁹Kenter, J. Bryce, R. Davies, A. Jobstvogt, N. Watson, V. Ranger, S. Solandt, J. Duncan, C. Christie, M. Crump, H. Irvine, K. Pinard, M. Reed, M. (2013) The value of potential marine protected area in the UK to diver and sea anglers. UNEP-WCMC, Cambridge, UK.

¹⁰British Sub Aqua Club. (2017). [Online]. Available at <https://www.bsac.com/divelocations.asp?section=1251&itemid=1949> [Accessed 2nd May 2017].

- 1.49 Within the study area recreational shore fishing occurs around the South-East coast with notable areas being Ramsgate due to the presence of the pier, harbour and beach. Other areas include Kingsgate Bay, Botany Bay, Joss Bay, Margate, Sandwich Bay and Broadstairs which allow access again from piers and harbours as well as beaches. Spring and summer shore fishing is good for catching bass, sole, flounder, dab, pollock, garfish and limited thornback rays. In autumn and winter whiting and codling are commonly caught species.
- 1.50 Recreational sea / boat angling occurs within a ten-mile radius around the coast throughout the year with many charter companies operating in Ramsgate. Sea / boat angling visitors in Thanet have been described as reaching 1,348 individuals over 12 months. This in comparison to other areas of Kent is relatively high with numbers in Dover to Folkestone reaching an upper boundary limit of 1,086. This also in comparison to the rest of England exceeds the upper boundary average of 611 angling visitors per site⁹. During the summer months (May–October) bass, pollock, smooth-hounds, thornback rays, mackerel, tub gurnard, sea-bream, plaice, tope, pouting and dogfish are commonly fished for. During the winter months (November- April) cod, bass, thornback rays, whiting, pouting, dab and dogfish are commonly caught. There are eight charter boats that operate out of the Ramsgate area¹¹.
- 1.51 There are examples of sea angling clubs in the Thanet area with the largest being in Birchington. The closest club to Ramsgate is the Foreness Sea Angling Club which is a relatively small club. Angling competitions are known to occur throughout the year with individuals not necessarily needing to be part of a club to enter, therefore they are open for all.
- 1.52 Ramsgate is promoted as having a variety of fishing due to the proximity to Goodwin Sands as well as the presence of wrecks, reefs and sand banks. Bottom, wreck and reef fishing is popular during the summer months in the Ramsgate area with both drift and anchor fishing being offered by a variety of charter companies.

11 Charter Boats UK. (2017). [Online] Charter Boats: Kent. Available at <https://www.charterboats-uk.co.uk/boats/?locationId=721>. [Accessed 4th May 2017]

- 1.53 Recreational fishing predominantly occurs during the weekend however anglers will fish during the week.
- 1.54 Alongside the recreational angling, charter companies will offer tours of Thanet Offshore Wind Farm and wildlife watching with seal tours being a popular boat activity and an attractive tourist activity. Launch facilities are available at Ramsgate Harbour and Broadstairs Harbour, amongst others.

Recreational Sailing

- 1.55 There are several sailing clubs that operate in the Thanet area deploying from Ramsgate Royal Harbour throughout the year. Royal Temple Yacht Club holds an annual week long friendly regatta which is widely recognised and popular with competitors and advertised as an alternative to the Cowes regatta which is a highly recognised event located in the Isle of Wight. There are other sailing clubs located in Margate.
- 1.56 Light hovercrafts are known to be used in the Thanet area for both sporting and recreational uses. They are primarily used at Pegwell Bay and at Ramsgate Main Sands where an annual Powercraft Grand Prix occurs. They are generally only used during Spring-Autumn at the weekends and only a small number of users exist.

Canoeing

- 1.57 Thanet has several clubs that offer canoe or kayak hire as well as guided tours. Alongside this Active Ramsgate have developed two self-guided canoe trails that set off close to Ramsgate Royal Harbour. The trail follows the coastline north for around two miles to Broadstairs, another trail follows the coast around Pegwell Bay to the National Nature Reserve, an internationally important site for waders and wildfowl therefore attractive for bird watching¹².

¹² <http://thanetcoast.org.uk/>

Bait digging / collecting

- 1.58 Bait digging is permitted by Thanet District Council at several locations along the coast. Pegwell Bay and Western Undercliff are relevant locations to this baseline report.
- 1.59 Bait digging is undertaken at low tide for both commercial and non-commercial reasons. Commercial bait digging will occur throughout the year but non-commercial will occur September to March. Ragworm and lugworm are the main species which are collected by either a fork or a hand-held water suction pump.

Existing Environment: Tourism Economy

- 1.60 The baseline underpinning the tourism economy assessment describes the volume and value of tourism activities within each of the tourism study areas, drawing out where possible the differing nature of the tourism offer in each area.
- 1.61 A range of sources can be used to quantify the volume and value of tourism activity. These include:
- **Tourism economic impact models:** there are a number of commercially available tourism models which draw on locally produced data (such as estimates of bed stock, occupancy rates, visitor surveys etc.) to produce local authority based estimates for the number of day and overnight visitors to an area, the spend in the local economy and associated employment in tourism sectors (as well as various other characteristics of the visitor economy). The most widely used models are the Scarborough Tourism Economic Activity Monitor and Cambridge models, which both draw on locally collected intelligence to provide estimates for the overall volume and value of tourism activity in local authority areas. These models cover both direct and indirect expenditure and employment.
 - **Locally collected data:** Alongside these tourism models, there will be a range of locally collected data which provides a finer grained and detailed picture of the nature of local tourism activities, the characteristics of visitors and the nature of the local offer. This includes visitor surveys; however, the robustness and therefore comparability of these datasets varies considerably.

- **Published datasets:** Nationally produced datasets such as the Business Register and Employment Survey (BRES) can be used to estimate the total level of direct employment in businesses trading in tourism related sectors. The estimate of employment in the visitor economy derived from BRES data overstates the level of direct tourism employment as it is based on a sector definition of employment which includes activity which is supported by both tourists and residents (e.g. restaurants and bars). It is not possible to measure indirect employment using this dataset.

1.62 In order to ensure that the baseline is produced on a consistent basis, we have drawn predominantly upon published datasets and economic impact models where possible.

1.63 In addition to these datasets, a number of particularly important viewpoints relating to tourism and recreation sites, within the ZTV, have been identified as part of the scoping consultation. These include:

- Reculver Country Park, Thanet Coastal Path;
- West Brook POS / Thanet Coastal Path;
- Margate Harbour Wall (Turner Arts Gallery);
- Kingsgate / North Foreland, Coastal Path;
- Broadstairs Promenade;
- Wellington Crescent, Ramsgate;
- Richborough Castle;
- Kings Avenue / Princes Drive, Sandwich Bay Estate;
- Deal Pier / Promenade;
- St. Margaret's at Cliffe (Coastguard Memorial);
- Joss Bay / North Foreland;
- Stone Bay;
- Foreness Point / Palm Bay;
- Walpole Bay (Margate); and

- Birchington-on-Sea.

1.64 Potential additional viewpoints include:

- Isle of Thanet, Manston Road near PRow;
- Broadstairs, Dumpton Gap;
- England Coastal Path, Sandwich Flats;
- Betteshanger Country Park;
- St Peter's Church, Sandwich;
- Chillenden;
- North Downs Way, near Woolage Village (Kent Downs AONB);
- South Foreland Lighthouse;
- Dover Castle; and
- Trinity Beacon, Goodwin Sands.

The Size and Importance of the Tourism Economy

1.65 This section provides an overview of the scale of the visitor economy across the study area (and of Thanet, Canterbury and Dover). The study area attracts a large number of visitors, and tourism makes an important contribution to the economy of Kent. The north coast of Kent is very accessible from the rest of Kent, London and further afield, including internationally. The main connections to the area consist of the M2 and M20 motorways, with additional connectivity enabled by the A299, A2 and A28. Furthermore, public transport connections to the area include regular services to and from London and along the south coast (including connections to Brighton). The study area is also served by high speed rail (HS1) which connects large parts of Kent (incl. Ashford, Canterbury, and Ramsgate).

1.66 Whilst much of the tourism market is seasonal, and is based on the more traditional seaside destinations, the study area benefits from several all-weather attractions which encourage tourism all year round (incl. Canterbury Cathedral, Sandwich, Turner Contemporary, and Whitstable).

1.67 Data from the Cambridge Economic Impact Model indicates that there were over 60 million visitors to Kent in 2015, spending more than £3.6 billion in the local economy. The majority of visitors (around 92%) were day visitors, with the rest (almost 5 million visitors) being staying visits to Kent. On average, staying visitors to the study area would stay for an average of 3.6 nights, and spent a total of £901 million in 2015.

Measure	Kent	Thanet	Canterbury	Dover
Average annual room occupancy (%)	70.5%	-	-	-
Day trips volume (000s)	55,748	3,387	6,571	3,889
Day trips value (£ million)	£1,874	£119	£215	£116
Overnight trips volume (000s)	4,885	494	649	424
Number of nights (000s)	17,476	2,059	2,671	1,397
Average nights per trip (000s)	3.6	4.2	4.1	3.3
Overnight trips value (£ million)	£901	£122	£146	£89
Total trips (000s)	60,633	3,881	7,220	4,313
Total trips value (£ million)	£3,610	£293	£454	£265
Jobs (000s)	71.9	7.3	9.4	5.6

Source: Destination Research, Economic Impact of Tourism, Kent, 2015 based on the Cambridge Economic Impact Model

1.68 Estimates for the volume of employment that tourism activity supports across Kent differ according to the data sources used. As Table 1.5 shows, employment estimates derived from the Cambridge Economic Impact Model gives a much higher figure than what the BRES does for 2015. The key difference is that BRES data captures only the direct employment associated with tourism-related activity, whilst the Cambridge Economic Impact Model also captures non-tourism supported jobs linked to multiplier spend from tourism (i.e. the indirect and induced employment associated with supply chain and wage expenditure).

- 1.69 Although it offers only a partial picture of the contribution of tourism to the employment base, BRES data is also available at the national level. This makes the comparison of tourism-related employment in the study area with other comparator areas.
- 1.70 BRES estimates that in 2015 there were around 57,000 jobs supported directly by tourism-related sectors in the study area, and equates to just over 9% of total employment. This is a similar proportion to that found nationally, as shown by the location quotient¹³ of 1.0 for the tourism sector across Kent. Within the study area, the concentration of tourism-related employment varies, with Thanet showing a concentration that is around 20% higher than that seen nationally (Location Quotient (LQ) 1.2).

Table 1.6 Employment and concentration in tourism, 2015

	Tourism (000s)	% Tourism	LQ vs GB
Kent	57.0	9.1%	1.0
Medway	7.0	7.9%	0.9
Kent & Medway	64.0	9.0%	1.0
Thanet	4.5	10.7%	1.2
Canterbury	8.0	12.5%	1.4
Dover	4.5	12.9%	1.4
South East LEP	147.0	9.2%	1.0
Great Britain	2,674.0	9.1%	1.0

Source: Office for National Statistics, Business Register and Employment Survey, 2015

¹³ Location quotient (LQ) is a measure of a region's industrial specialisation relative to a larger region (eg. nationally). A LQ of 1.0 indicates that both regions have the same level of specialisation, whereas a LQ greater than 1.0 means that the smaller region has a higher concentration of a particular sector than is seen in the larger region.

Accommodation Stock

- 1.71 At present, data on the number of bedrooms by type of accommodation (i.e. serviced, self-catering, camping, boat moorings, etc.) is not available. Evidence available from an assessment of the economic impact of tourism in the study area¹⁴ in 2015 indicates that overall average room occupancy in 2015 stood at around 71% (compared with 67% in the South East region), and represents an increase of around 4% between 2013 and 2015. At present, detailed occupancy data is not available for local areas within the study area (i.e. Thanet, Canterbury and Dover).
- 1.72 Data available from the Cambridge Economic Impact Model indicates that overall spend on (paid) accommodation in the study area in 2015 was around £397 million, and represented around 11% of all visitor spend that year. The data also shows that around a third of all overnight stays in the study area were in either serviced (23%) or self-catered (6%) accommodation. Furthermore, around half of all overnight stays were with friends and relatives.

Table 1.7 Selected accommodation data for the study area and selected comparators, 2015

	Kent	Thanet	Canterbury	Dover
Total spend on accommodation (£ million)	£397	£47	£64	£40
Percentage of total spend on accommodation	11%	16%	14%	15%
Percentage of trips for paid accommodation	56%	66%	73%	67%
Nights by accommodation type:				
• Serviced	• 23%	• 20%	• 32%	• 33%
• Self-catering	• 6%	• 8%	• 7%	• 9%
• Friends and relatives	• 47%	• 28%	• 21%	• 55%

¹⁴ Destination Research, *Economic Impact of Tourism for Kent*, 2015.

• Other (incl. camping, caravans, second homes, moorings, etc.)	• 24%	• 44%	• 40%	• 3%
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Source: Destination Research, Economic Impact of Tourism, Kent, 2015 based on the Cambridge Economic Impact Model

The Nature of the Tourism Offer

Canterbury Local Authority Area

Canterbury

1.73 Canterbury is the main settlement within the local authority area and is famous for its cathedral and is home to four universities. In the Middle Ages, the city was one of Europe’s great place of pilgrimage and knowledge. The city is home to several attractions, some of which include the Canterbury Cathedral, the Marlowe Theatre (named after Christopher Marlowe), the St Augustine’s Abbey ruins, the Westgate Towers Museum, the Canterbury Heritage Museum, the Roman Museum and the Kent Museum of Freemasonry. The river Stour is one of the characteristic features within the city centre, with several historic and river punting tours being on offer. In addition, several walking tours are available exploring the city (incl. tours based on Geoffrey Chaucer’s Canterbury Tales and ghost tours).

Herne Bay

1.74 Herne Bay is located around eight miles north of Canterbury city centre, and offers plenty of traditional seaside entertainment (such as trampolines on the beach and mini-golf) along the North Kent coastline. The Reculver Towers and Roman Fort is an imposing landmark on the Herne Bay coast. Other key features / attractions at Herne Bay include the Herne Bay Museum and Gallery, the Central Bandstand, Memorial Park and the Herne Bay Cultural Trail which offers visitors the opportunity to find the historical and general places of interest in the town.

Whitstable

- 1.75 Whitstable is located around five miles to the west of Herne Bay along the North Kent coastline. Its harbour is still operational and the pebble beach offers the opportunity for waterfront walks, in addition to population water sports (such as windsurfing, kite-surfing and sailing). Key tourist attractions in Whitstable include Whitstable Castle with its stunning gardens overlooking the bay, and the Museum and Art Gallery.

Thanet Local Authority Area

Margate

- 1.76 Margate is located along the northern coast of Kent, and is often identified as one of the traditional sea-side resorts in the South East of England. The town is characterised by its sandy beaches and sparkling waters in addition to a café culture and an emerging cultural renaissance. Margate is home to the internationally-acclaimed Turner Contemporary presenting both contemporary and historical art. June 2015 marked the reopening of Dreamland which is often described as 'the UK's original Pleasure Park' with its historic rides, and classic side shows. The Old Town offers visitors a funky vibe; a place where chic eateries, modern galleries and vintage shops rub shoulders with traditional seaside delights such as candyfloss stands, fish and chip shops as well as seafood stalls. Furthermore, Margate is also home to several other tourist attractions such as the Margate Winter Gardens, the town's Theatre Royal (often touted as the second-oldest in the country), and the Tom Thumb Theatre (often identified as one of the smallest theatres in the world). Finally, Margate is also home to a number of annual festivals (such as the Margate Jazz Festival) and attracts top bands (top bands include the Beatles and the Kaiser Chiefs) and some of Britain's best beach volleyball teams as part of the Margate Masters.

Broadstairs

- 1.77 Broadstairs is one of Thanet's seaside resorts and is described as being brim-full of nostalgic, old-world and seaside charm. Like Margate, the town is characterised by its sandy beaches and bays, and ideal for seaside walks amid towering chalk stacks, the harbour and cliff-top promenade. Broadstairs also offers modern sea-side activities such as surfing and other harbour-related activities. The town is home to

several cafés, restaurants and bars (of particular interest are Morelli's and Chiappini's both of which date from the 1950s) in addition to a number of galleries (incl. New Kent Art, Little Art Gallery and the Broadstairs Gallery). Broadstairs was one of Charles Dickens' favourite holiday spots, and has a number of connections with Dickens and Victorian England including the Dickens House Museum, Bleak House, St Peter's village and the Crampton Tower Museum. Each year the town hosts the Dickens Festival as well as the Broadstairs Folk Week (bringing music sessions to pubs, gardens and beaches) and the Broadstairs Food Festival.

Ramsgate

- 1.78 Ramsgate is located a couple of miles south of Margate and its bustling harbour borders a packed yacht marina. The town is proud of its status as England's only Royal Harbour and is awash with history and overflowing with continental charm. Popular tourist attractions in Ramsgate include the Maritime Museum (boasting of its own Meridian Line Five minutes and 41 seconds ahead of GMT), the Micro Museum, the Ramsgate Tunnels and the Defence of the Nation Education Centre. The town is also peppered with elegant Georgian terraces and impressive Regency villas. The Ramsgate Festival is a multi-arts festival which serves up a feast of workshops, exhibitions, film, theatre and dance.

Dover Local Authority Area

Dover

- 1.79 Dover is the home county Kent and is home to one of Britain's major gateways to the rest of Europe. The Strait of Dover is the narrowest part of the English Channel and lies around 16 miles to the south east of Canterbury. Dover is mostly known for its port-related activities (incl. the Dover Marina) and its white cliffs. However, the town is home to several visitor attractions which include the Dover Museum, the Dover Castle (with its 2,000-year history) and the Dover Transport Museum. The town also has a rich history associated with the World War 2 which include the Battle of Britain Memorial (commemorating the sacrifice of those who fought and defended the skies of Britain) and the Fan Bay Deep Shelter (abandoned WW2 tunnels within Dover's white cliffs). Dover is also home to the Archcliffe Fort dating

back from the late 1300s overlooking Dover Harbour, as well as Connaught Park dating back from Victorian times.

Deal

- 1.80 Deal is located around nine miles along the Kent coastline north of Dover, and is a former fishing, mining and garrison town. Deal offers something for everyone, including history at Deal Castle (built by Henry VIII) often defined as one of England's finest Tudor artillery castles and the Deal Maritime and Local History Museum (showcasing domestic history and local industry of the town), as well as the Linden Hall Studio (showcasing the best of contemporary British art (incl. painting, sculpture, ceramic and glass)).

Sandwich

- 1.81 Sandwich is located south of Ramsgate along the east Kent coastline. The town is home to several visitor attractions which include the Richborough Roman Fort and Amphitheatre (dating from the time of the Roman invasion of Britain in AD 43), the Sandwich Guildhall (built in 1579), the Guildhall Museum (which tells the story of Sandwich from medieval times to the present day), and St Peter's Church (currently undergoing construction of a staircase inside the church's medieval tower to allow for fantastic views of the town and beyond).



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