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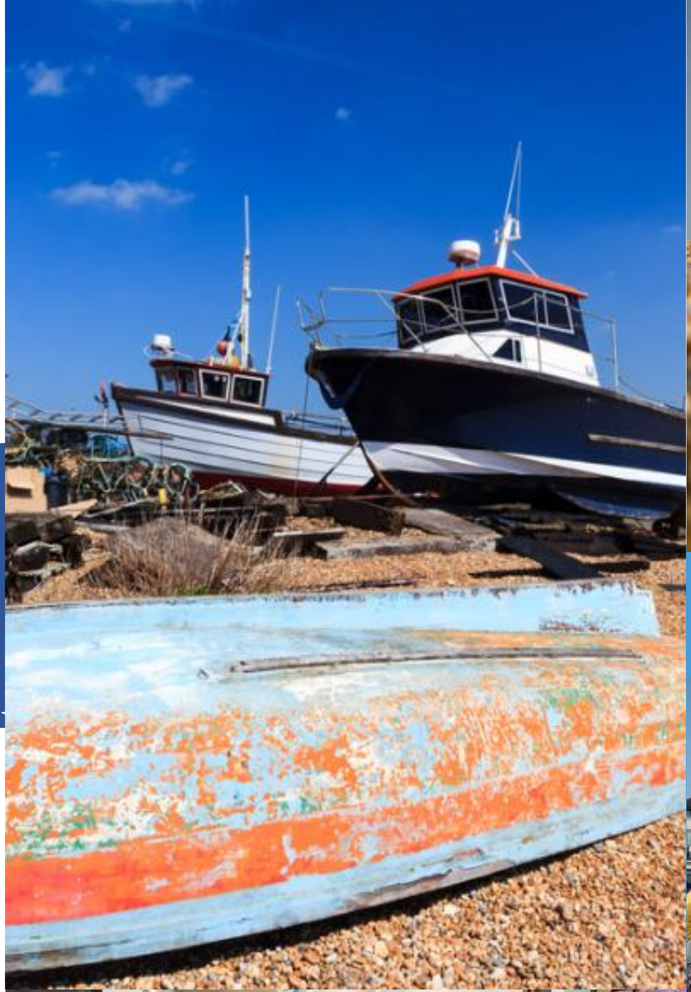

Deal Town Visitor Survey

December 2023

DOVER
DISTRICT
COUNCIL

whitecliffscountry
VISIT DOVER DEAL SANDWICH

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Introduction:

This document presents the key findings of the Deal Visitor Survey. The survey was commissioned and funded by Dover District Council and undertaken by Visit Kent, in partnership with Destination Research Ltd. The survey is part of a district-wide visitor research with interviews conducted in Dover, Deal and Sandwich, as well as an online panel survey, with findings presented in a standalone report. It builds on insights gathered in 2017, with comparisons to this data set drawn, whenever possible. The questions have been updated, to reflect the changes that have happened since – from the regeneration work and investment that has gone in the area, to wider global and national events such as the UK's departure from the EU and the attention this drew onto the district, the media coverage of the migration crisis, the pandemic and subsequent recovery journey, as well as the current cost of living crisis.

This element of the research project aims to provide White Cliffs Country with a wealth of insights into who the Dover, Deal and Sandwich visitors are, their experiences, perceptions and interaction with the destinations, updating the destination's understanding of the visitor profiles, their behaviours and motivations. The survey also sought to identify elements driving visitor satisfaction. As stated in the brief, the findings will also form a baseline for valuable future visitor research by which Dover District Council can identify changes and emerging trends to help inform future marketing strategies and make recommendations for product development.

Data collection:

- Face-to-face interviews with a random sample of visitors in key tourist locations.
- Individual interviewing sessions carried out from the hours of 11am to 6pm between the months of July and September 2023.
- Interviews were spread across weekdays and weekends to ensure a representative sample of visitors were interviewed.
- Targeted at 18+, non-Deal residents.
- In total, 971 interviews were completed. Of these, 350 interviews were completed in Dover, 312 in Deal and 309 relate to Sandwich. All interviews were conducted in English.

Considerations:

- As was the case in the 2017 survey, due to the relatively low number of visitors in Deal, it was not possible to interview randomly, i.e. every 5th visitor to walk past the interviewer. Rather, the interviewers approached people who looked as though they may be visitors to the town.
- Those visiting for non-leisure purposes, e.g. trips concerned with their normal work, study or household shopping were not included in the survey.
- As satisfaction measurements rely on visitors having used or experienced a particular service or facility, interviews were conducted with visitors who were at least half way through their visit.
- This report presents the results relating to the town of Deal only. The results for Dover and Sandwich are presented in separate reports.

Executive Summary:

Visitor Profile

- Visitors were spread across the age groups – 22% of all visitors were children under 16 and 46% were over the age of 45 years.
- Family units accounted for almost a third of all visiting groups, followed by those who travelled alone and those travelling with their extended family. The gender split was fairly representative, with 47% male respondents and 53% female.
- The average group size was 3.03 people, comprising of 2.35 adults and 0.68 children.
- In terms of where were visitors to Deal from, 57% were from the South East, followed by 30%, who lived in London. Only 5% of respondents were from overseas.

Trip Characteristics

- Most (90%) were visiting for leisure or a holiday and few (6%) to see friends or relatives.
- 24% were visiting Deal for the first time, with the repeat visitor market accounting for the majority of all visitors to Deal (76%).
- Two thirds of all visitors were 'day visitors from home' (67%). The majority of all day visitors stayed in Deal all day (75%) and a further 23% stayed for half a day.
- Over a third of visitors (34%) were in Deal as part of an overnight stay. On average, overnight visitors who stayed in Deal (61%) spent 3.76 nights away from home.
- Those staying outside Deal were asked their reasons for not staying in the town. The most common response was simply that people were holidaying elsewhere.

Accommodation

- Most overnight visitors stayed in the homes of friends or relatives (33%), followed by Airbnb (20%).
- The majority (93%) of overnight visitors staying in paid accommodation rated the level of service received positively ('good' or 'very good'). Similarly, 83% thought their accommodation offered 'good' or 'very good' value for money.
- Overnight visitors were most likely to book directly with the accommodation provider, with more than half (54%) using this method.

Executive Summary:

Transport

- The car was the most common mode of transport used by visitors to reach Deal, chosen by 83% of respondents.
- Less than half of car drivers (46%) used the town's car parks and most (90%) found parking in the town centre 'quite easy' or 'very easy'.

Expenditure

- The average overall expenditure among staying visitors to Deal (per person per 24 hours) on accommodation, eating out, shopping, entertainment and transport was £51.21.
- Day visitors from home who are visiting Deal spent an average of around £21.09 per person per day in the town.

Activities undertaken and associations

- Walking and rambling were the most popular activities undertaken by visitors to Deal, enjoyed by 40% of visitors overall. 28% engaged in other types of activities such as eating out, shopping, visiting the pier and seafront, whilst 17% indicated attending an event.
- The **best** things about Deal according to visitors were the walking opportunities, as well as the history, heritage and Deal Castle. Respondents also made comments about people being friendly and the general atmosphere being friendly and relaxing and of course, the pier and the seafront are also perceived as key assets of the town.
- The **challenging** things about Deal related to the shortage and cost of parking, as well as the limited availability of public toilets and of public transport.

Sources of information

- Seven out of ten (71%) of all visitors had not searched for destination information pre-trip – rather they relied on their previous knowledge. Of those who did search for tourism information, the majority stated using digital sources of information, with a proportion preferring to ask their friends for recommendations.

Executive Summary:

Satisfaction

- All visitors were invited to rate a set list of aspects about their visit to Deal using a scale of 1 (very poor) to 5 (very good). The feeling of welcome (4.68), followed by finding their way round the town - road signs (4.60), and pedestrian signage (4.56) achieved the highest scores.
- The scores for shops and public toilets are particularly low when compared to the 2017 results, but better than the average for the three towns (Dover, Deal and Sandwich).
- In terms of overall enjoyment of the visit, 51% of visitors to Deal rated their enjoyment as ‘very high’ and a further 43% rated it as ‘high’.
- Overall, 68% of visitors to Deal said it was ‘very likely’ that they would recommend the town to somebody else and a further 28% said it was ‘likely’. Overall, these results are higher than the ratings achieved in 2017.

Survey Findings – Visitor Profile

Visitor Profile – Group composition

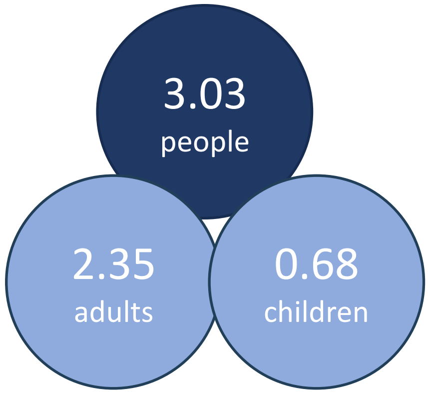
Age groups

Visitors were spread across the age groups. Children under 16 accounted for 22% of visitors. Overall, 46% of all visitors were over the age of 45 years.

The average group size was 3.03 people, comprising of 2.35 adults and 0.68 children. The gender split was slightly weighted towards female respondents (53%). The 2023 results include larger groups, with more children and less adults aged 45 and over, compared to the 2017 survey.

Family units accounted for about a third (31%) of all visiting groups. When intergenerational families (with grandparents) and extended families (with relatives and / or friends) are included, the total increases to 56% of the sample.

Visiting group



Group composition	2023	2017
A couple	31%	40%
Family unit	29%	31%
Groups of friends	16%	12%
Extended family (with relatives and / or friends)	9%	2%
Alone	6%	10%
Intergenerational family (with grandparents)	6%	5%
Specialist / interest group	2%	-
Other	1%	0%

Age group composition			
	Male	**Female**	**Total**
0-15	12%	10%	22%
16-24	1%	4%	5%
25-34	4%	5%	9%
35-44	7%	10%	17%
45-54	6%	10%	15%
55-64	8%	8%	16%
65+	9%	6%	15%
Total	**47%**	**53%**	**100%**

Age group composition 2017			
	Male	**Female**	**Total**
0-15	10%	8%	17%
16-24	3%	3%	6%
25-34	4%	6%	11%
35-44	5%	7%	12%
45-54	6%	9%	15%
55-64	7%	9%	16%
65+	11%	12%	23%
Total	**46%**	**54%**	**100%**

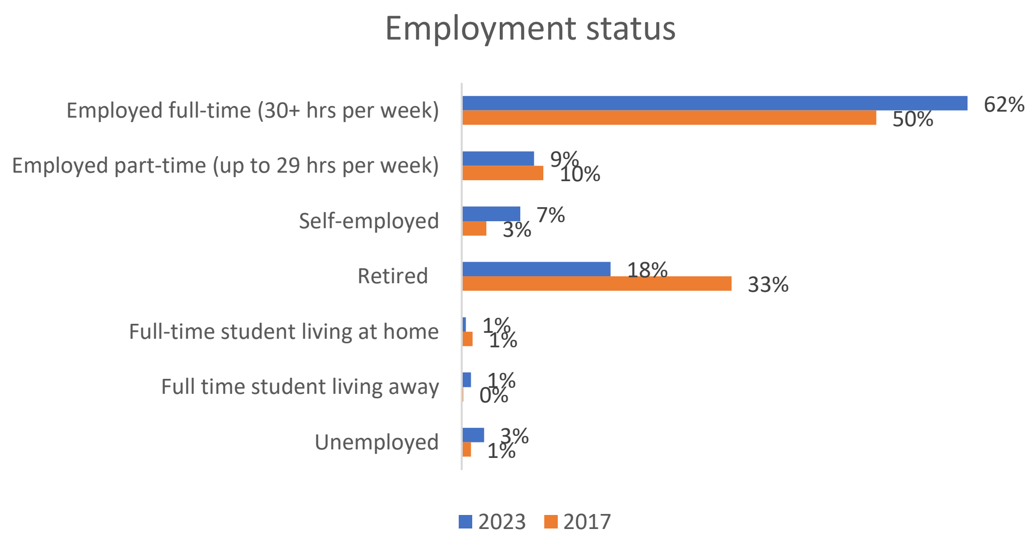
Visitor Profile – Employment

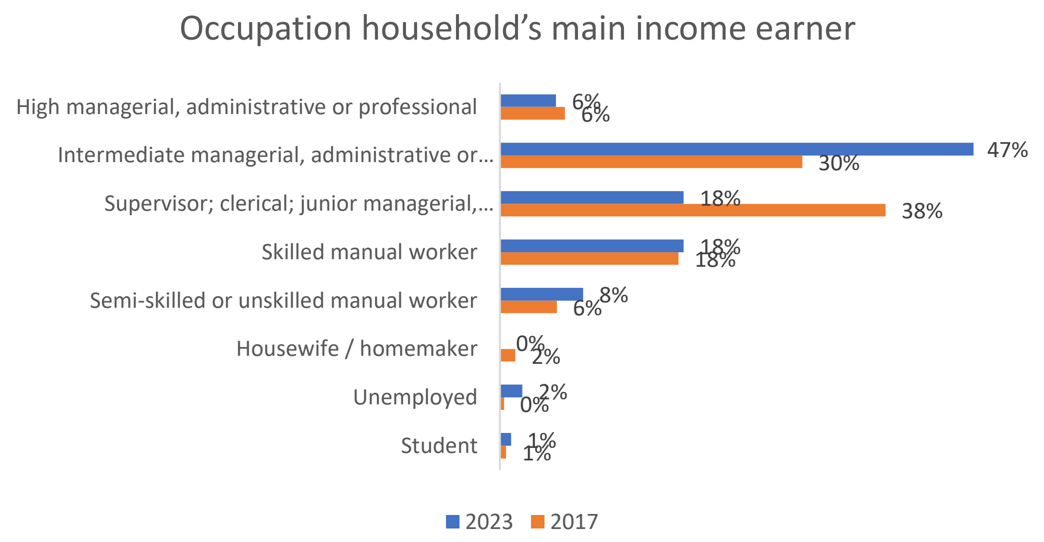
Employment status and occupation

Just over three in five (62%) of visiting groups contained a chief income earner who was in full time employment at the time of the survey. A further 18% of all visitors were retired.

Occupation

The largest proportion of respondents (47%) were in middle managerial roles. Skilled manual workers and Junior managerial roles followed, accounting for 18% of the sample each. This is a shift from 2017 results.





Visitor Profile – Origin of visitors

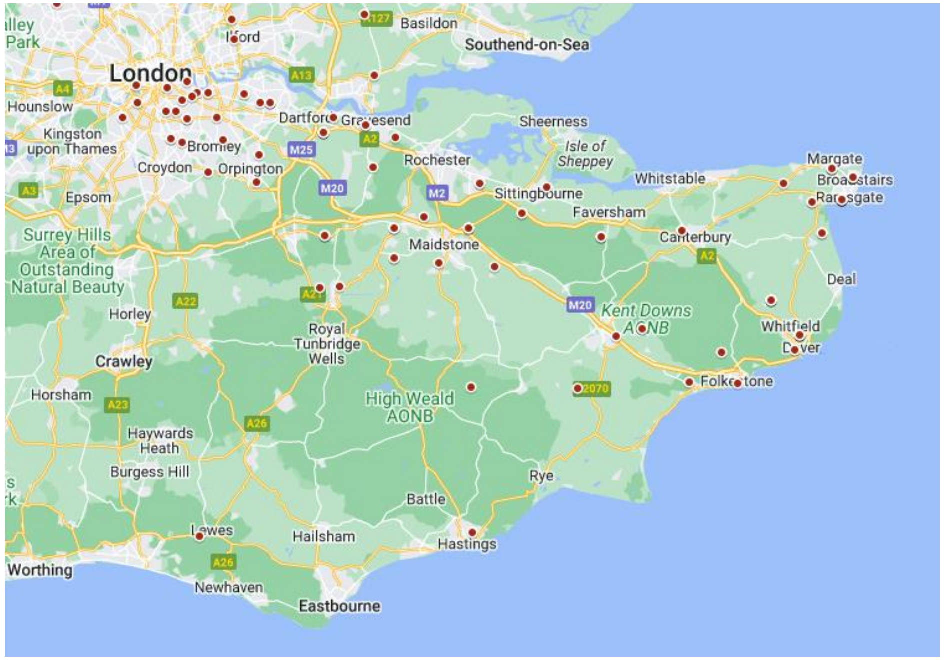
About six in ten (57%) of respondents were from the South East. This was followed by those who lived in London (30%), which shows a large increase compared to the 2017 sample, and the East of England (7%).

There were large concentrations of respondents from Kent, which accounted for 49% of respondents, and in particular visitors from Canterbury (12%), Dover (11%), and Ramsgate (11%). See maps below and right.

A small proportion of respondents (5%) were residents from other countries, including Australia, Canada, Czech Republic, France, Germany, New Zealand, Spain and USA.

5%
Overseas

Respondent distribution by home location		
	2023	2017
South East	57%	61%
London	30%	10%
East of England	7%	9%
West Midlands	2%	3%
East Midlands	1%	4%
North West	1%	3%
South West	1%	2%
North East	0%	0%
Yorkshire and Humber	0%	2%
Northern Ireland	0%	2%
Scotland	0%	2%
Wales	0%	1%
Sample	**100%**	**100%**



Survey Findings – Trip Characteristics

Trip Characteristics

Main purpose of visit

Most visitors were visiting for leisure or holiday purposes (90%), an overall increase compared to 2017 results. A minority of visitors (representing 6% of all visits) were visiting Deal to see friends or relatives. Other purposes, accounting for 4% of all visits, included fishing trips and attending events (car show).

Purpose of visit	2023	2017
Leisure/Holiday	90%	84%
Shore visit from cruise ship	0%	0%
(Non-regular) Shopping trip	0%	1%
Visiting friends/relatives	6%	9%
On a Golf trip	0%	-
Other	4%	5%

First time or repeat visitors?

A quarter (24%) were visiting Deal for the first time, with the repeat visitor market accounting for a larger proportion of all visitors to Deal (76%), compared to 2017 (74%).

Have you visited the area before?	2023	2017
Yes	76%	74%
No	24%	26%

Trip Characteristics

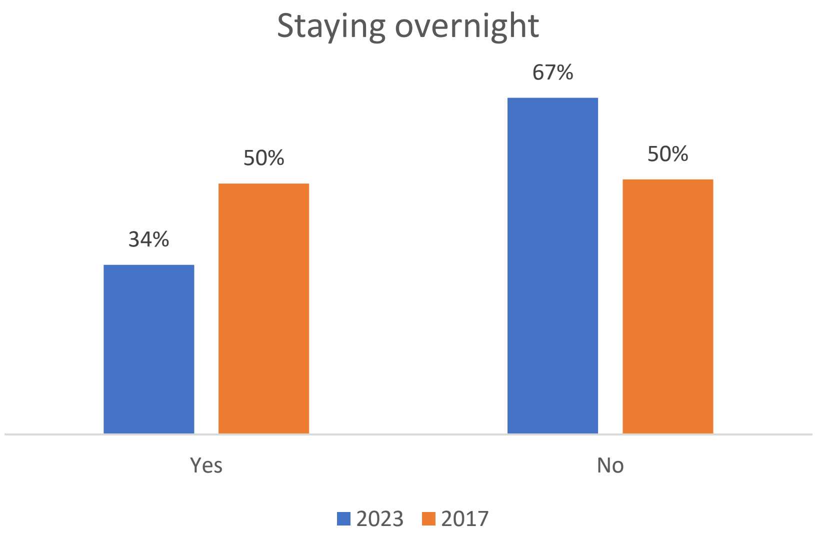
Day trips or overnight stays?

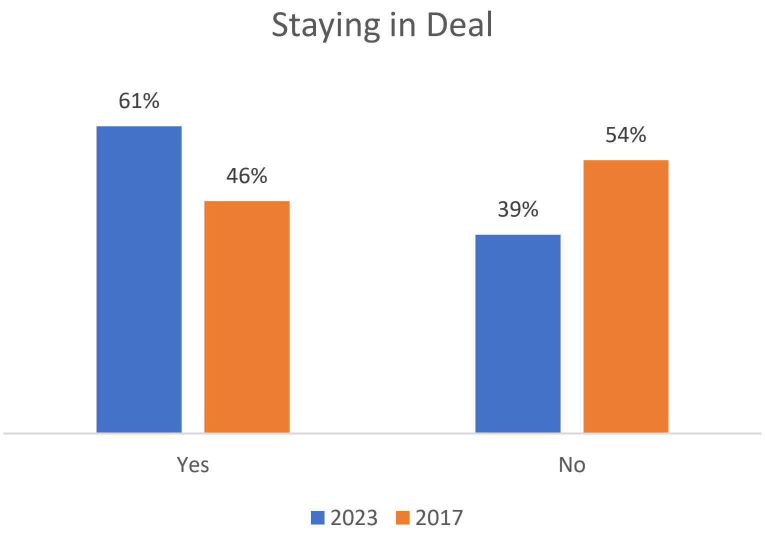
About two thirds (67%) of all visitors were 'day visitors from home' – visitors who started their trip that day from their home residence and planned to return to their residence on the same day. The remaining 34% were in Deal as part of an overnight stay. However, not all overnight visitors were staying in Deal. The results show that 61% of overnight visitors interviewed were staying in Deal and 39% were staying elsewhere.

Compared to the 2017 data, insights show an increase in the proportion of day trips, trend not only also seen among the visitors to Dover town, but in line with national trends around more local visitation and the cost of living crisis as well.

Where else are they staying?

Overnight visitors who chose other destinations outside of Deal decided to either stay elsewhere in the Dover District, or in Thanet, Tonbridge and Malling, Canterbury and Folkestone and Hythe.





Destination	Percentage
Walmer	25%
Kingsdown	17%
St Margaret's at Cliffe	13%
Sandwich	13%
Ramsgate	4%
Margate	4%
Folkestone	4%
Dover	4%
Eastry	4%
Wrotham	4%
Broadstairs	4%
Littlebourne	4%

Trip Characteristics

Reasons for not staying in Deal

Those staying outside Deal were asked their reasons for not staying in the town. The most common response was simply that people were holidaying elsewhere (38%). Just over half gave ‘other’ reasons, primarily related to staying with friends and relatives based elsewhere, but also due to the lack of accommodation nearby.

Reasons for not staying overnight	2023	2017
Holidaying elsewhere	38%	27%
No decent accommodation	4%	3%
It is not an appealing place to stay	0%	2%
Lack of availability	4%	6%
Too expensive /cheaper elsewhere	0%	3%
Other	54%	58%

Day Trip duration

Three quarters of all day visitors (75%) stayed in Deal all day and a further 23% stayed for half a day. Only 2% of day trips lasted less than two hours. This highlights a significant positive change compared to 2017, when only 37% visited the town for a full day. This indicates an opportunity to continue to communicate the variety of product. Improving perceptions around accommodation should also be prioritised, for all three towns, to inspire more overnight visits in the district.

Day trip duration	2023	2017
Less than two hours	2%	13%
Half a day	23%	50%
All day	75%	37%

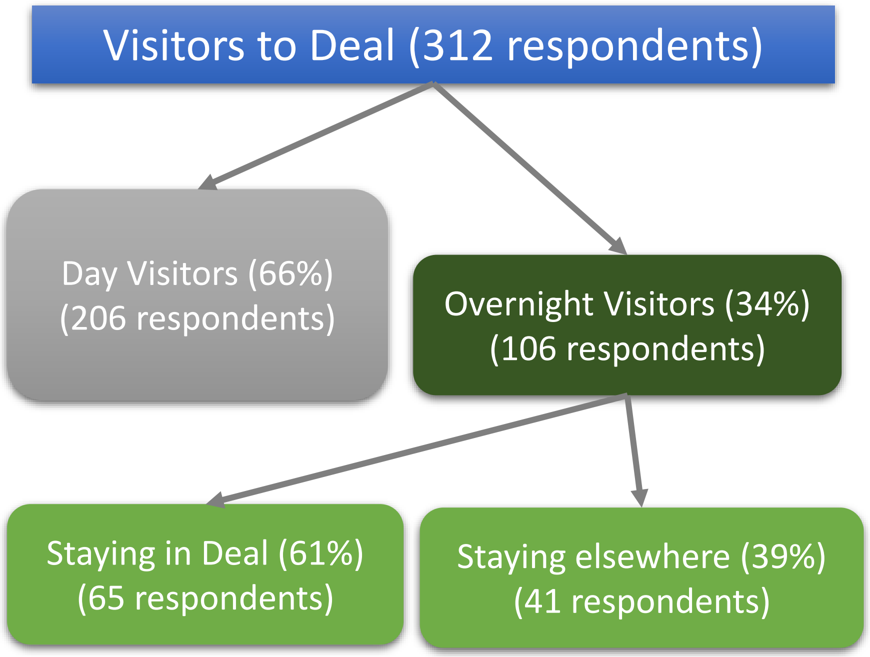
Overnight Trip duration

On average, overnight visitors staying in Deal spent 3.8 nights away from home. Those who stayed elsewhere spent 4.1 nights away. This is less than in 2017, but in line with regional and national trends that indicate a bigger appetite for shorter breaks.

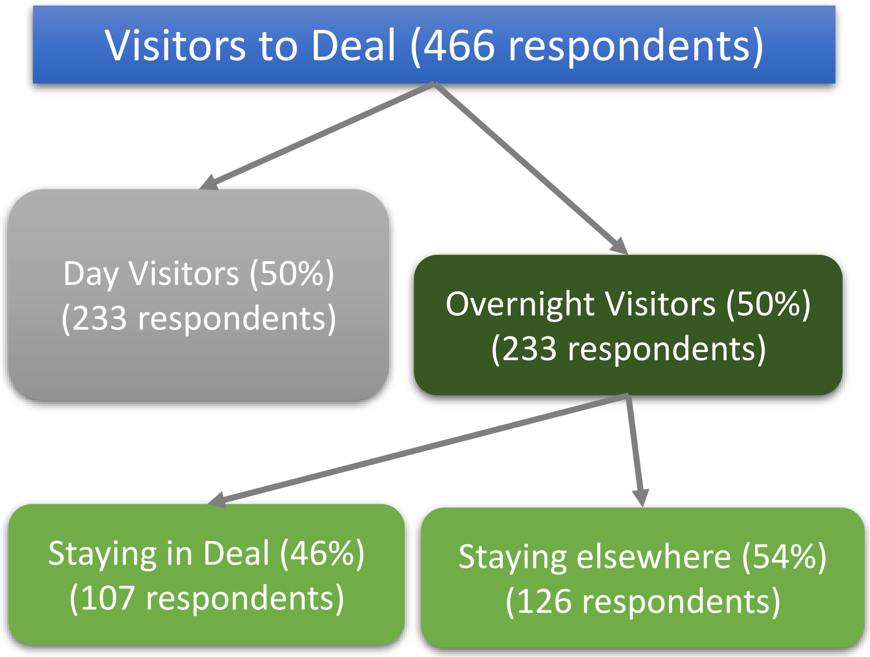
Sample composition – 2023 and 2017 comparison

Two thirds (66%) of respondents to the 2023 survey were visiting for a day trip. The remaining 34% were staying overnight. However, as it was the case in 2017 not all overnight visitors were staying in Deal. The results show that 61% of overnight visitors interviewed were staying in Deal and 39% were staying elsewhere.

2023



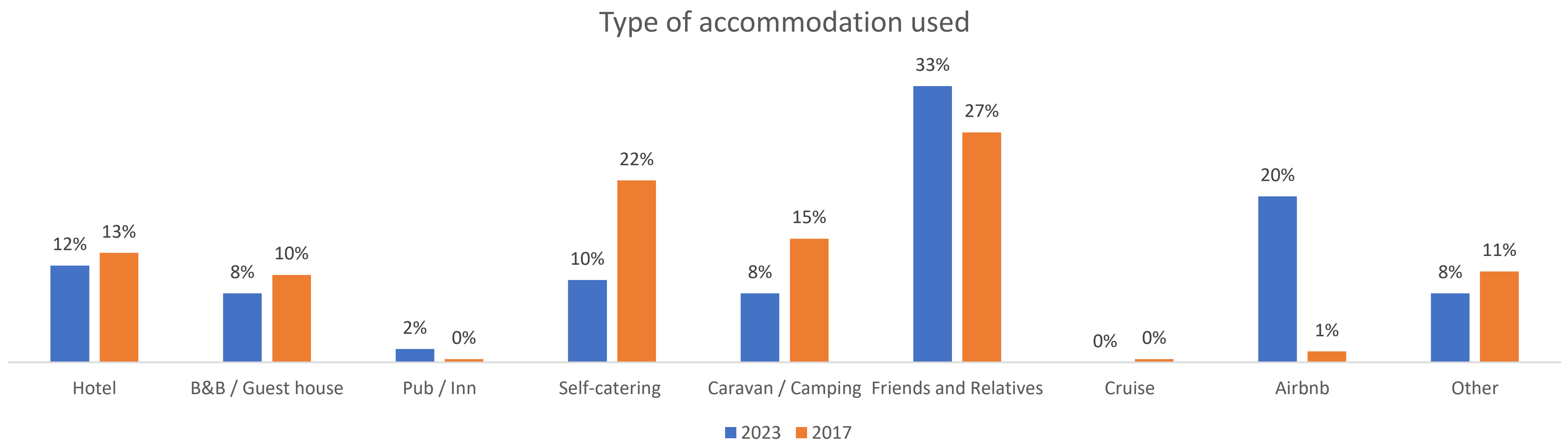
2017



Trip Characteristics

Overnight trip - Accommodation used

The majority of overnight visitors stayed in homes of friends or relatives (33%), up from 2017 when this accounted for 27% of all overnight stays. This is in line with trends from the Economic Impact Study, as well as the feedback received in the Kent Residents Research, which showed a high number of residents having had VFR stay with them. Self-catering (10%) and shared accommodation such as Airbnb (20%) followed, although there was a clear shift from traditional self-catering units (10%, down from 22% in 2017) to Airbnb (up to 20% from 1% in 2017). All other types of accommodation experienced a drop since 2017.

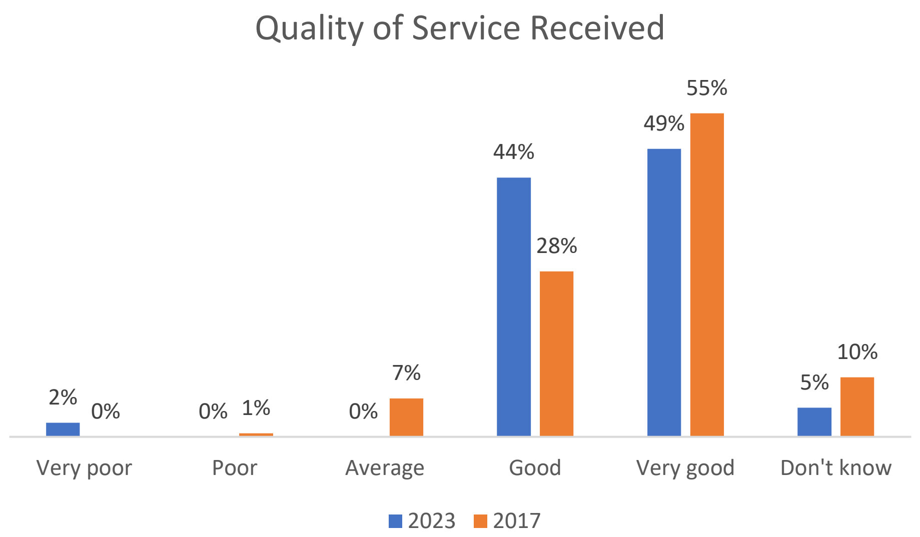


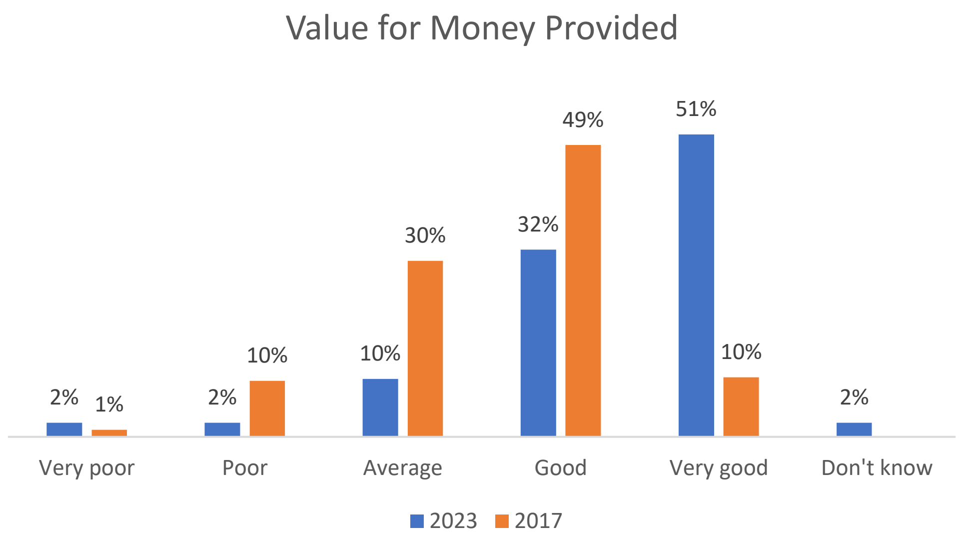
Trip Characteristics

Overnight trip - Accommodation ratings

The majority of overnight visitors staying in paid accommodation (93%) rated the level of service received as either ‘very good’ (49%) or ‘good’ (44%). This is higher than the levels achieved in 2017, when 83% rated the service received as ‘good’ (28%) or ‘very good’ (55%). This strengthens the need to continue to support quality overnight provisions in the area, to further improve visitors’ experience, challenging their perceptions around what’s available and creating opportunities for longer breaks, return visits and recommendations.

Half (51%) thought the accommodation used represented ‘very good’ value for money and a further 32% thought it was ‘good’. Again, the 2017 results show lower scores, with 59% saying value for money was ‘good’ (49%) or ‘very good’ (10%). This feedback is really important and positive, particularly in the current challenging financial climate. Messaging around quality and value for money is encouraged in order to raise awareness and to drive visitation.



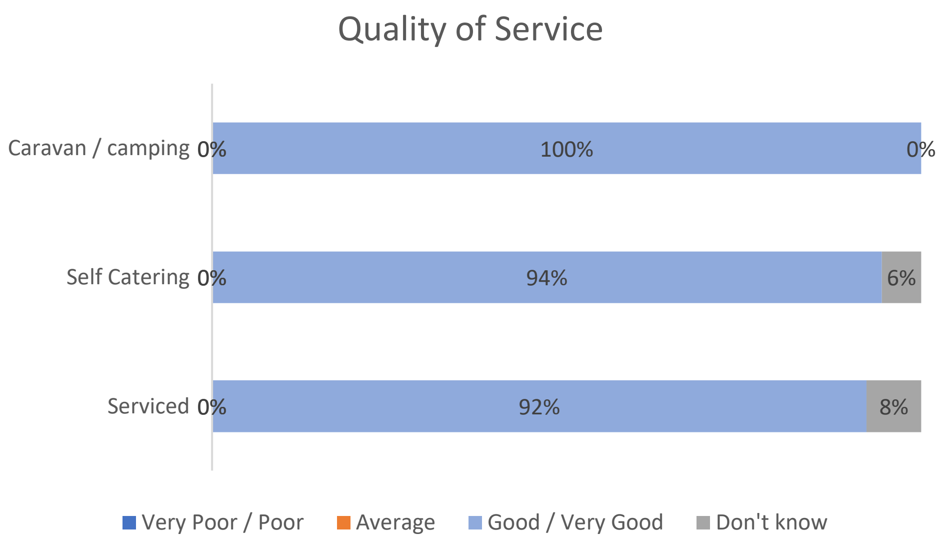


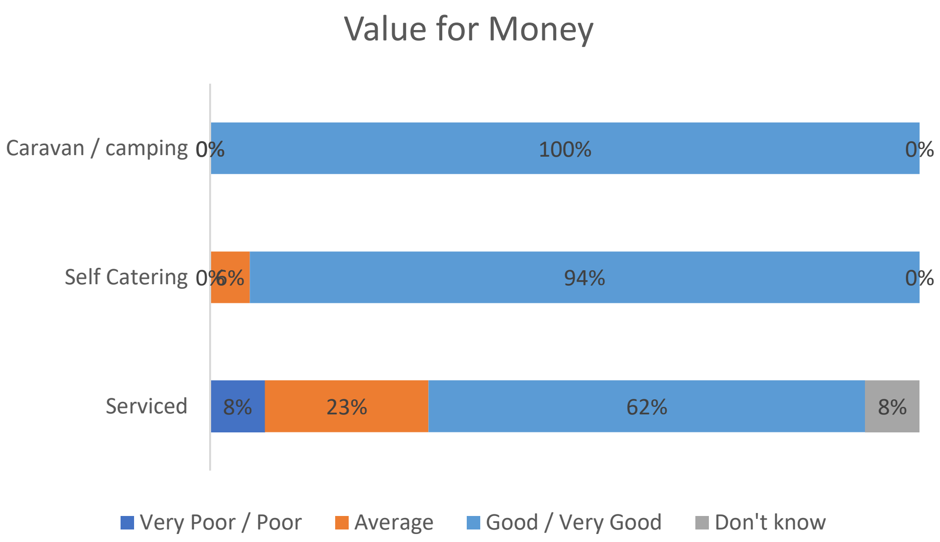
Trip Characteristics

Overnight trip - Accommodation ratings

The majority (92%) of visitors staying in serviced establishments rated the quality of service received as being ‘good’ or ‘very good’. Similarly, 94% those staying in self-catering accommodation rated the quality of service received as being ‘good’ or ‘very good’. All visitors staying in caravan and camping sites rated the quality of service received as being ‘good’ or ‘very good’.

In terms of the value for money provided by the various accommodation establishments, 62% of overnight visitors staying serviced accommodation rated the value for money as being ‘good’ or ‘very good’ and 23% as ‘average’. For caravan and camping sites, the score was 100% positive. Almost all (94%) of those staying in self-catering accommodation rated the value for money as being ‘good’ or ‘very good’, with 6% rating it as ‘average’.





Trip Characteristics

Overnight trip - Accommodation booking

Visitors to Deal were most likely to book directly with the accommodation provider, with just over half (54%) using this method. This represents a large increase since 2017, when 29% used this method. One in five (22%) used ‘other methods (primarily AirBnB and online travel agents such as Skyes cottages), and 17% of overnight visitors used travel fare aggregator websites such as Booking.com.

Booking accommodation	2023	2017
Direct with accommodation provider	54%	29%
Other	22%	29%
Booking.com	17%	18%
None	5%	19%
Expedia	2%	2%
TripAdvisor	0%	4%
Trivago	0%	0%

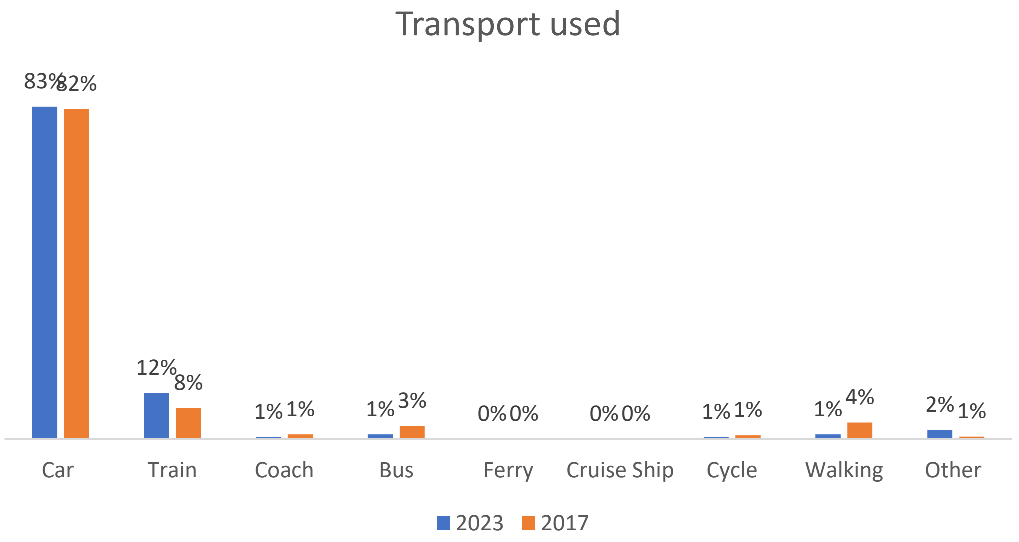
Trip Characteristics

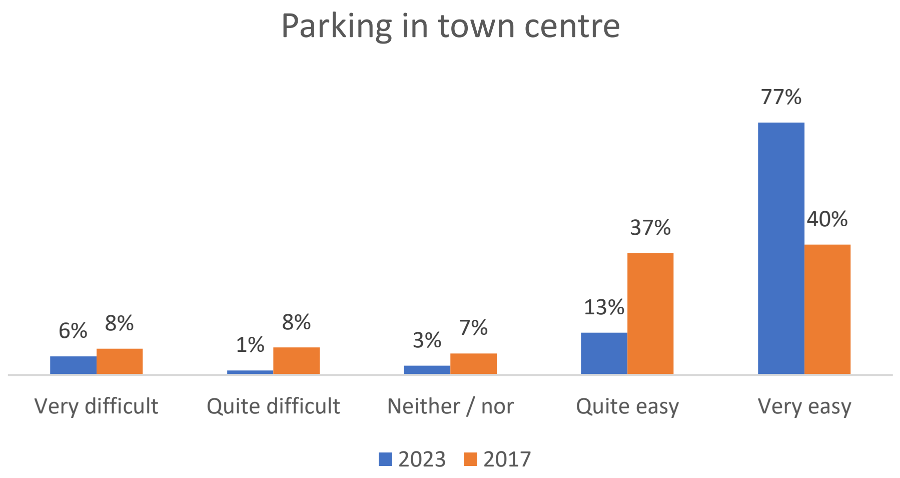
Mode of transport used

The car (or some other private motor vehicle such as motorbike or motorhome) was the most common mode of transport used by visitors to reach Deal, chosen by 83% of respondents (marginally up compared to 2017). This is followed by those who indicated arriving by train (12%), a higher proportion compared to 2017 results.

Just over two in five car drivers (46%) used the town's car parks. Of these, the vast majority (90%) found parking in the town centre 'very easy' (77%) or 'quite easy' (13%), up from 77% in 2017. Interestingly, over half of those travelling by car (54%) indicated not having paid to use a town centre car park. Potential reasons for this could be linked to the increasing VRF visits and people potentially leaving their cars there, or maybe choosing to park outside of the town centre.

Paid to use town centre car park	2023	2017
Yes, in a car park	9%	58%
Yes, using pay and display	37%	13%
No	54%	29%





Trip Characteristics

Activities undertaken whilst visiting

Walking and rambling were the most popular activities undertaken by visitors to Deal, enjoyed by 40% of visitors overall. 25% of respondents mentioned 'other' activities. These included eating out and having ice creams, shopping, visiting the pier and the seafront. A further 17% mentioned local events, exhibitions and festivals, highlighting the growing importance events and festivals have as a means of attracting visitation. 6% visited attractions (mainly Deal and Walmer Castles).

Activities undertaken	Percentage
Walking/Rambling	40%
Attended an event	17%
Visited attractions	6%
Visited the coastline/beaches	3%
Cycling	2%
Fishing (Pier / lakes / riverside)	2%
Visited history/heritage	2%
Sea Fishing	1%
Outdoor activities, watersports	1%
Visited arts/culture	1%
Bird Watching	0%
Sailing	0%
On a Golf trip	0%
Took part in organised experience	0%
Other	25%

Deal Castle
Walmer Castle

Martha Trust
Treasure Trail
Car show

Went shopping
Eating and drinking (lunch out)
Eating and drinking (ice cream)
The Pier
Visit the seafront / beach

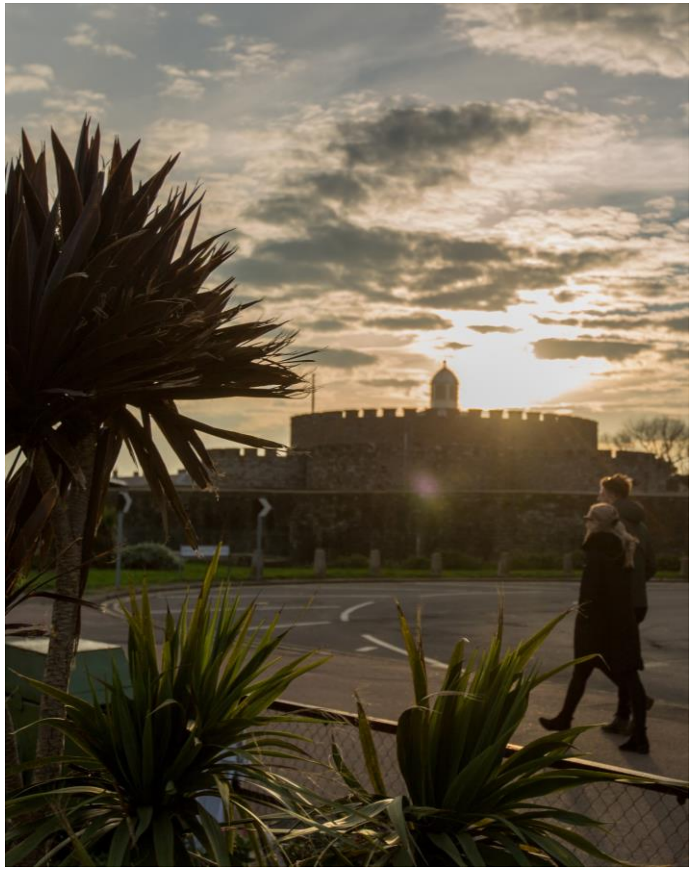
Trip Characteristics

Expenditure levels

The average overall expenditure among staying visitors to Deal (per person, per 24 hours) on accommodation, eating out, shopping, entertainment and travel and transport was £51.21 (£49.90 in 2017). Accommodation and food and drink accounted for the highest proportion of the expenditure. The average overnight visit lasted 3.90 nights (5.72 in 2017), meaning that the average expenditure per person and per overnight trip was £199.72 (£285.43 in 2017). This means that although the expenditure per night has marginally increased, due to the overnight trips being shorter, the overall expenditure per trip decreased.

Day visitors from home spent an average of £21.09 per person and per day in the town (£14.66 in 2017), with eating out and transport accounting for the highest proportions of expenditure.

Survey Findings – About Deal



Best things about Deal…

Respondents were asked their opinion with regards to what are the **best** things about Deal and their answers have been grouped into key themes. Most respondents mentioned walking, as well as history, heritage, Deal Castle and the shopping opportunities. The seafront, the pier, and the beach and coastline are also perceived as key assets of the town. A large number of respondents also made comments about people being friendly and the general atmosphere being friendly and relaxing, which is a great spontaneous perception, that can encourage future visitation given that many people want to go to places where they're welcomed, and where they can soak up in a relaxing and friendly environment.

Challenging aspects about Deal…

The **challenges** related to Deal according to visitors have also been grouped into key themes. The biggest concern related to the shortage and cost of parking. This is also potentially linked to why over half of those who came by car did not pay to use a town centre car park. Many said Deal lacks a good range of shops and restaurants on the High Street. Finally, the limited availability of public toilets and of public transport, particularly good rail links make up the third theme.

Survey Findings – Destination Marketing

Destination Marketing

Information used

Seven out of ten visitors (71%) had not searched for destination information pre-trip – rather they relied on their previous knowledge. Of those who did search for tourism information, 9% visited websites / search engines other than destination websites. A further 5% asked friends for recommendations. Smaller proportions looked for recommendations on social media or visited review websites such as Trip advisor (3%). ‘Other’ sources (14%), included specific attractions’ websites (e.g. Martha Trust, Deal Pier website, English Heritage), Google search and Google Maps, and other travel-related sites such as Booking.com and Time Out.

Once in Deal, the majority (96%) did not make use of any type of visitor information. Those who did, relied on printed guides, websites, leaflets and local maps.

Information Used (Planning stage)	2023	2017
I did not use any information	71%	74%
I visited other websites / search engine	9%	9%
I asked friends for recommendations	5%	3%
I visited review websites (Trip advisor etc.)	3%	3%
I looked for recommendations on social media	3%	0%
I looked through brochures / leaflets	1%	3%
Advertisement (Paper / Magazine/ TV / radio)	1%	4%
I visited the destination website	1%	2%
I followed an influencer	0%	0%
Other	14%	3%

Information during the visit	Percentage
None	96%
Other	2%
Printed guides	2%
whitecliffscountry.org.uk website	1%

Destination Marketing

Visitor Information Centre

Overall, only 1% of visitors made use of the Visitor Information Centre so the following results should be considered as indicative only. Respondents were asked to rate the levels of satisfaction with the service received. The VIC scored particularly well on the ease of finding the VIC and the information provided, with scores of 5.00 and 4.33 out of 5 respectively. The score for the quality of service was slightly lower at 4.00. Overall, the 2023 result for ease of finding is better than in 2017 and significantly better compared to the three towns average, but those for quality of service and information received were lower.

VIC Satisfaction scores			
	2023	Three towns 2023	2017
VIC Ease find	5.00	3.75	4.45
VIC Quality service	4.00	4.69	4.64
VIC Information received	4.33	4.56	4.55

Survey Findings – Visitor Satisfaction

Visitor Satisfaction

Most 'liked' aspects of Deal as a destination

All visitors were invited to rate a set list of aspects about their visit to Deal using a scale of 1 (very poor) to 5 (very good). The feeling of welcome (4.68), followed by finding their way round the town - road signs (4.60), and pedestrian signage (4.56) achieved the highest scores. There are some interesting changes in ranking compared to the 2017 results, which again, could potentially be indicative of trends we're witnessing around the need to have a good time and feel welcome, as well as the accessibility of a place, as these are now major destination decision influencers.

The scores for shops and public toilets are particularly low when compared to the 2017 results, but better than the average for the three towns (Dover, Deal and Sandwich).

Satisfaction scores			
	2023	Three towns 2023	2017
Feeling welcome	4.68	4.61	4.57
Road signs	4.60	4.54	4.70
Pedestrian signage	4.56	4.52	n/a
General atmosphere	4.51	4.38	4.59
Beaches/coastline (cleanliness)	4.50	3.59	n/a
Outdoor recreation / watersports	4.30	4.12	n/a
History & Heritage	4.28	4.51	4.62
Places to Eat and Drink	4.25	4.18	4.59
Maps and information boards	4.12	4.21	4.43
Attractions	3.76	3.85	4.37
Shops	3.23	3.14	4.19
Public toilets - availability	2.57	2.41	4.01
Public toilets - cleanliness	2.39	2.19	3.99

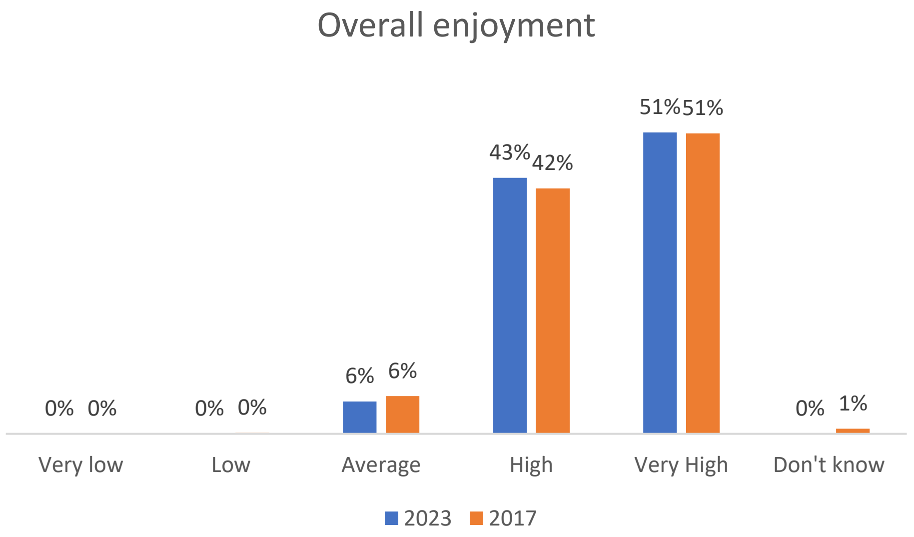
Visitor Satisfaction

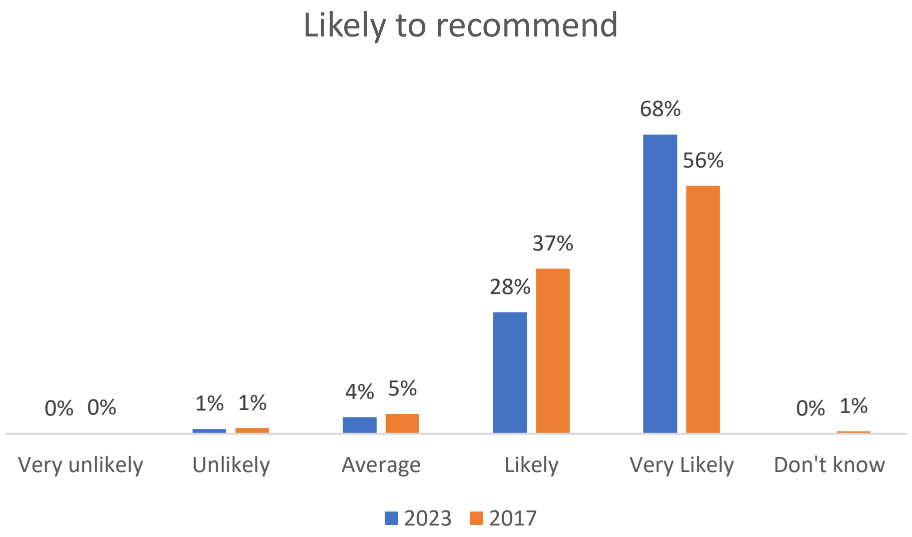
Overall Enjoyment

In terms of overall enjoyment of the visit, 51% of visitors to Deal rated their enjoyment as ‘very high’ and a further 43% rated it as ‘high’. These results are in line with the ratings achieved in 2017.

Likelihood of recommendation

Overall, 68% of visitors to Deal said it was ‘very likely’ that they would recommend the town to somebody else and a further 28% said it was ‘likely’. Overall, these results are higher than the ratings achieved in 2017.





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