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Dover District Online Visitor Survey

December 2023

DOVER DISTRICT COUNCIL

white cliffs country
VISIT DOVER DEAL SANDWICH

Contents:

Introduction:

This document presents the key findings of the Dover District Online Visitor Survey. The survey was commissioned and funded by Dover District Council and undertaken by Visit Kent, in partnership with Destination Research Ltd. The online panel survey is part of a district-wide visitor research, which also included a set of face-to-face interviews conducted in Dover, Deal and Sandwich. The overall project 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.

The online panel survey element of the project was delivered for the first time, to further substantiate the results from the face-to-face interviews. Not only did it capture the views of current visitors from various locations of interest, but it also delved into the opinions, associations and barriers of non-visitors and lapsed visitors to White Cliffs Country, aiming to inform the destination's future activity, informing product development and future marketing strategies. To this aim, key focus areas have been highlighted throughout the sections of the report.

Data collection:

- Online interviews collected using a national-wide online panel of respondents.
- Interviewing carried out between the end of September and early October 2023.
- Targeted at 18+ respondents from London, East of England and South East, but excluding Kent residents.
- In total, 818 complete responses were achieved. Of these, 406 were given by current visitors and 412 were given by non-visitors, including those that had visited longer than five years ago.

Considerations:

- The survey was about visiting White Cliffs Country, which includes Dover, Deal and Sandwich.
- We were interested in respondents' views even if they don't visit very often, or if they had never visited and don't know the area.
- The aim was to find out more about respondents' perceptions of the area as a tourist or leisure destination, rather than visiting for business purposes.

Executive Summary:

Visitor Profile

- Overall, a larger proportion of respondents were younger compared to the face-to-face interviews. 15% of all current visitors were aged 18-24, with more than half aged 25-44 (53%). Non-visitors were more evenly split. The 35-44 was the largest age group (25%).
- About half of visitors (51%) were from London. This was followed by residents from the South East (30%), and the East of England (19%). Non-visitors were more evenly split between the three regions targeted.

Trip Behaviour

Segmentation

- Visitors were defined as those who visited in the last five years and non-visitors had either never visited before or visited longer than five years ago. An equal split of visitors and non-visitors was achieved.

Awareness and Visitation

- The highest awareness was with Dover, among both visitors and non-visitors. This was followed by Sandwich and by Deal. Same pattern was seen when it came to visitation.

Future Visits

- Intention to visit among visitors is high, with almost three in five (57%) current visitors indicating they will definitely visit White Cliffs Country again in the future, and with two in five (41%) considering a visit in the future.
- When asked to explain the reasons why they would not consider visiting White Cliffs Country, respondents stated that they would prefer to go somewhere closer to home or go abroad, or that they ‘don't know anything about White Cliffs Country’.
- Over half (56%) of non-visitors will consider a future visit to White Cliffs Country, and a quarter (26%) will definitely visit in the future.
- When asked to explain the reasons why they would not consider visiting White Cliffs Country, the majority said ‘they have no reason to go there’ (31%), or that ‘there are other places I want to go to more’ (19%).

Executive Summary:

Destination Associations

- Visitors' top association with Dover was 'Long history', just above 'Family-friendly', which, in turn, was the top association for both Deal and Sandwich.
- Being 'Relaxing' and 'Beautiful' are attributes also strongly related to Deal and Sandwich. It's also worth noting that Dover is strongly associated with 'Nature' and with having a 'Distinct identity'.
- In terms of less associated attributes, the White Cliffs Country destinations are not linked to specific age groups ('More for the young', 'More for the old') and it's regarded as a seasonal destination (not 'For all seasons').
- Being 'Family-friendly' and 'Beautiful' are the two top associations for Deal and Sandwich, according to non-visitors. As was the case with visitors, the top association with Dover according to non-visitors was 'Long history', which is not surprising, given the historical prominence of the town.
- The attributes least associated with Dover, Deal and Sandwich according to non-visitors are very similar to those identified by current visitors. One difference is that non-visitors felt the destination is not 'easy to get to'.

Previous Visitation

- About two thirds (64%) took a leisure trip to White Cliffs Country. A quarter were visiting friends or family and 12% were joining a cruise from Dover town.
- Almost two in five respondents visited with their spouse or partner. Groups of friends accounted for 8% of the sample of visitors and 6% travelled alone. Family groups made up the rest of the sample (48%).
- A weekend day trip was the most popular type of visit (41%), followed by short breaks of between one to three nights (30%).
- Asked about the reasons for not staying longer on their most recent visit, one in three respondents said 'it was just a day trip for one specific place, attraction or activity'.

Transport

- Transport used to get to and from White Cliffs Country included mainly cars (44%) and the train (21%), followed by organised coach tour (7%).
- Once at the destination, one in three continued to use the car but there was also a significant increase in the proportion of visitors who walked (17%) or who took buses (14%).

Executive Summary:

Activities undertaken

- The two most popular activities, enjoyed by about half of all visitors to White Cliffs Country were going for a walk or ramble (52%) and visiting the coast and the local beaches (47%).

Attractions visited

- Dover Castle and the White Cliffs of Dover were the most popular attractions visited in Dover town. In Deal, the main attractions were Deal Seafront and Pier (51%) and Deal Castle (50%), whereas in Sandwich these were the Sandwich Bay Bird Observatory (31%), Guildhall Museum and the St Peter's Church and Haven Heights (30% each).

Satisfaction with last visit

- Looking at visitors only, taking every aspect of their trip into consideration, two in five respondents said they were 'very satisfied' with their last visit to White Cliffs Country, and a further 42% said they were 'satisfied'.

Future Visitation

- Current visitors are quite likely (36%) or very likely (16%) to take a day trip to the area in the next 12 months. A short leisure break would be their second option.
- About a third of current visitors would visit with their partner or spouse (36%), followed by younger families (17%) and adults with other adult family members (12%).
- Unlike with current visitors, non-visitors selected short breaks as the most popular type of future visit, saying they were likely (26%) or very likely (9%) to choose this option above day trips or longer stays.

Sources of information

- The main sources of information likely to be used by both visitors and non-visitors when planning a future visit to White Cliffs Country are typically online channels, including general online searches, visits to review websites and visits to destination websites.

Sustainability

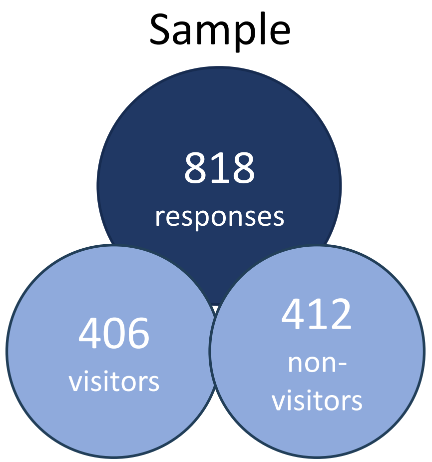
- Clean, unpolluted beaches, parks and green spaces, opportunity to 'shop local'/support independent businesses, actions to protect the natural landscape and environmentally-friendly activities are the most important measures respondents like to see when visiting somewhere in England on a short break or a holiday.

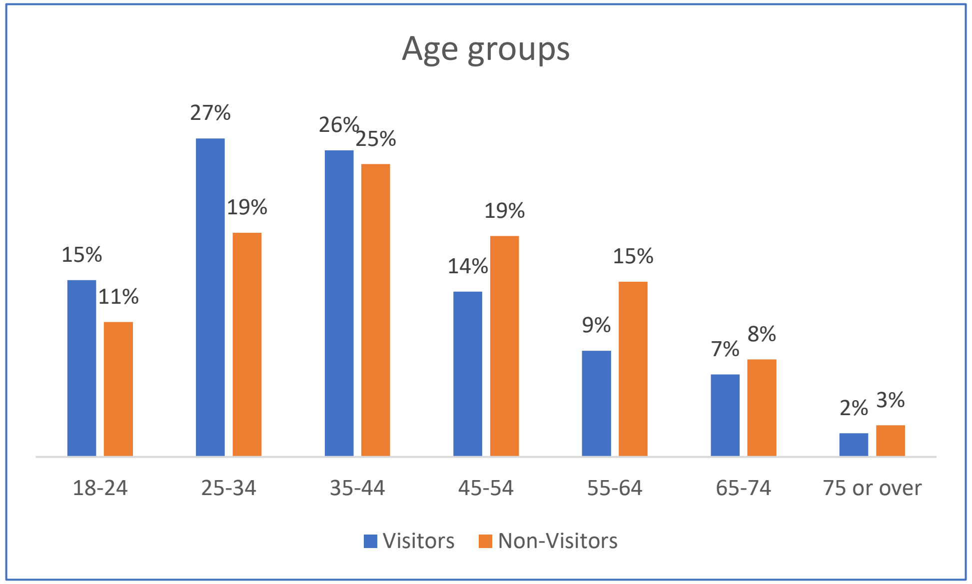
Survey Findings – Visitor Profile

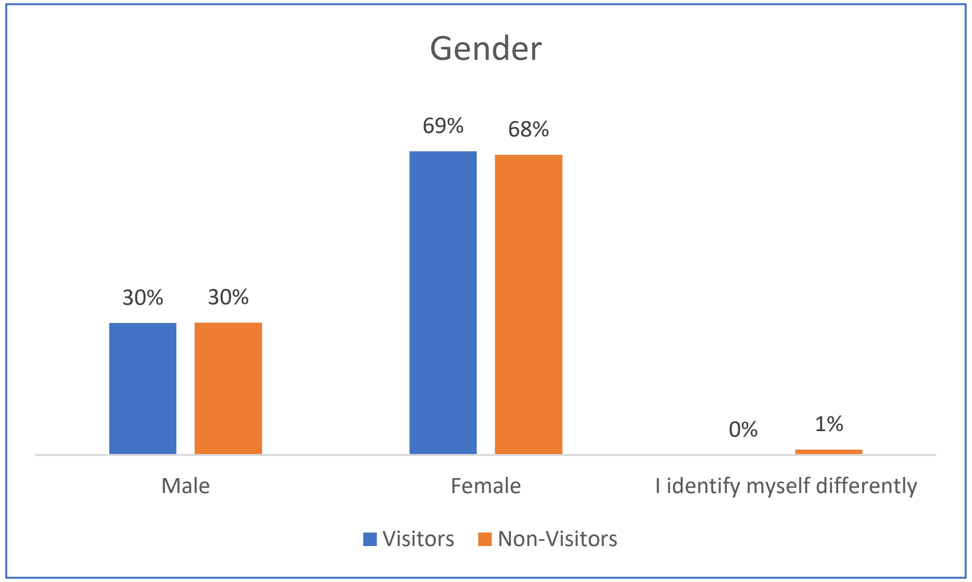
Visitor Profile

Age groups
Just over half (53%) of current visitors were aged between 25 and 44, overall a larger proportion of younger visitors compared to the interviews. Non-visitors were more evenly split. The 35-44 was the largest age group (25% of the sample), followed by the 25-34 and 45-54 age groups (19% of the sample each).

Just over two thirds of the sample of both visitors and non-visitors were female.



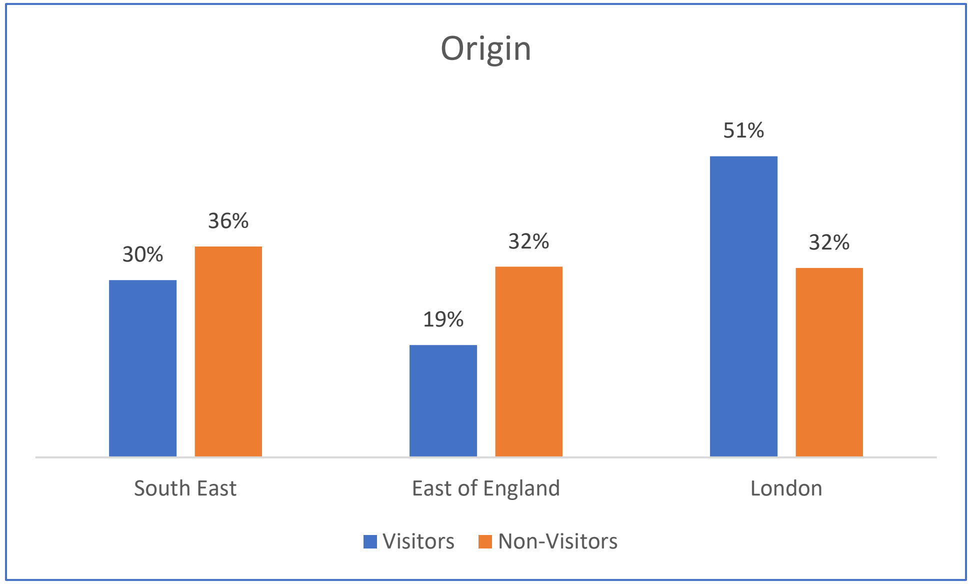




Visitor Profile – Origin

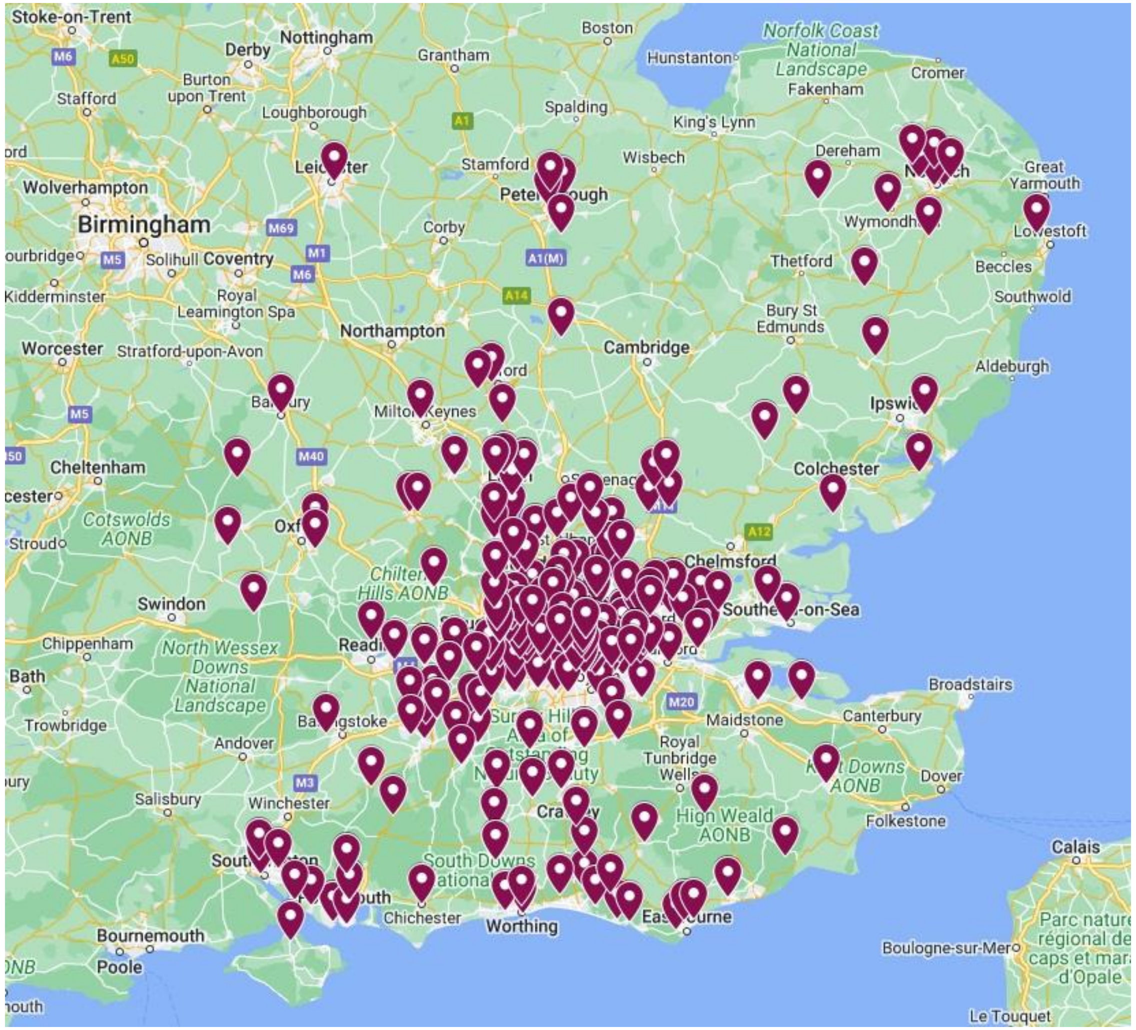
About half of visitors (51%) were from London. This was followed by residents from the South East (30%), and the East of England (19%). Non-visitors were more evenly split between the three regions targeted (South East, 36%; East of England and London, 32% respectively). Tapping into this wider geography adds to the knowledge gathered from respondents in destination, as the latter category is made up from a higher proportion of more local, close by visitors.

There were large concentrations of respondents from Hampshire, Surrey, West and East Sussex. See maps overleaf.

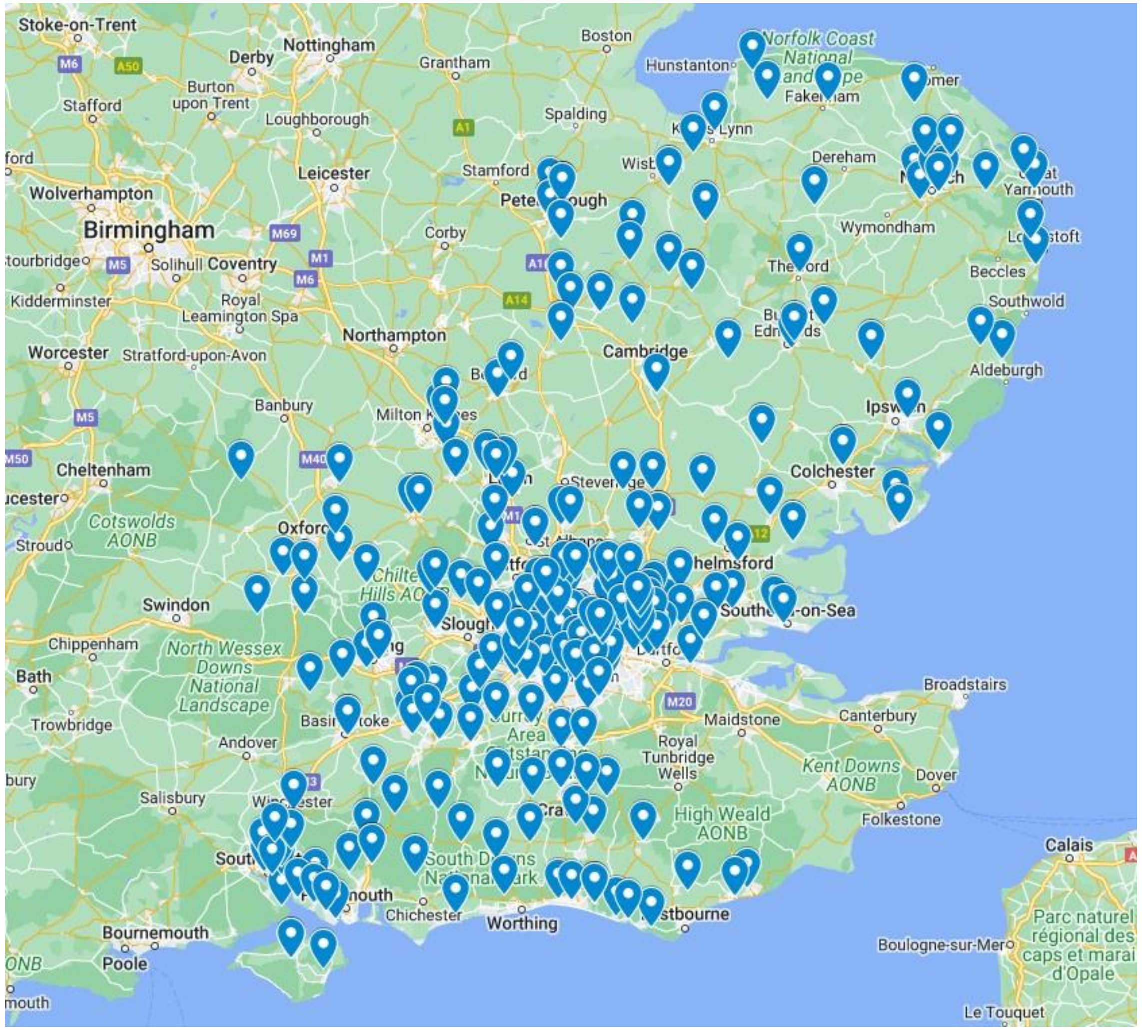


Which county in the South East do you live in?	Visitors	Non-Visitors
Hampshire	25%	29%
Surrey	20%	14%
West Sussex	14%	10%
East Sussex	13%	11%
Berkshire	11%	10%
Buckinghamshire	8%	13%
Oxfordshire	6%	10%
Isle of Wight	3%	3%
Kent	0%	0%

Visitor Profile – Origin - Visitors



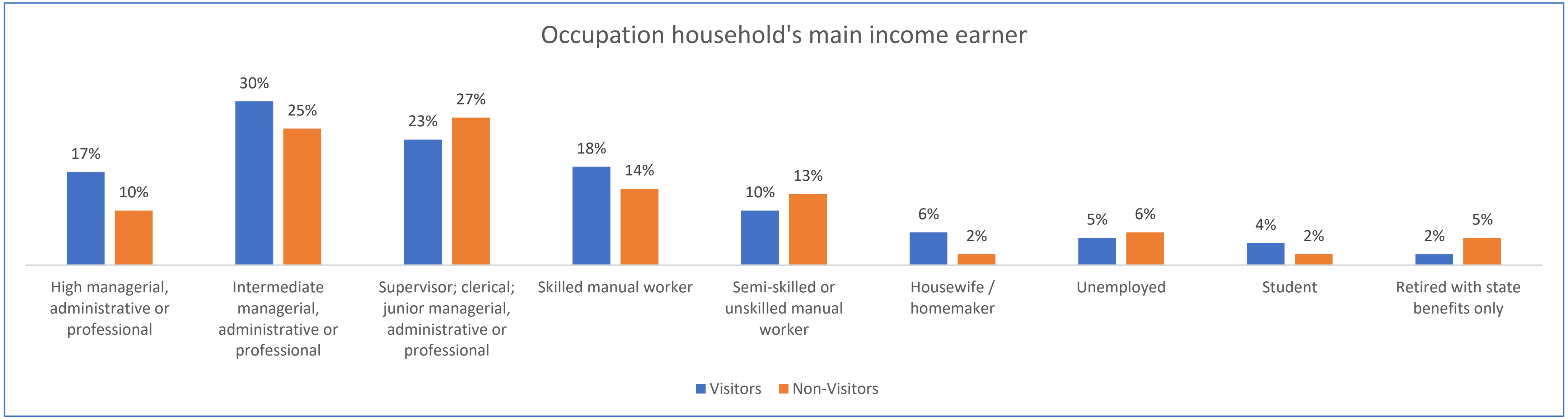
Visitor Profile – Origin – Non-Visitors



Visitor Profile – Employment

Occupation
The largest proportion of visitors (30%) were in middle managerial roles. Junior managerial roles (23%) followed, together with skilled manual workers (18%) and high managerial roles (17%).

The two highest groups among non-visitors, accounting for just over half of all non-visitor respondents (54%), included junior managerial roles (27%) and middle managerial roles (25%). Skilled and semi-skilled workers accounted for 14% and 13% of non-visitors respectively.

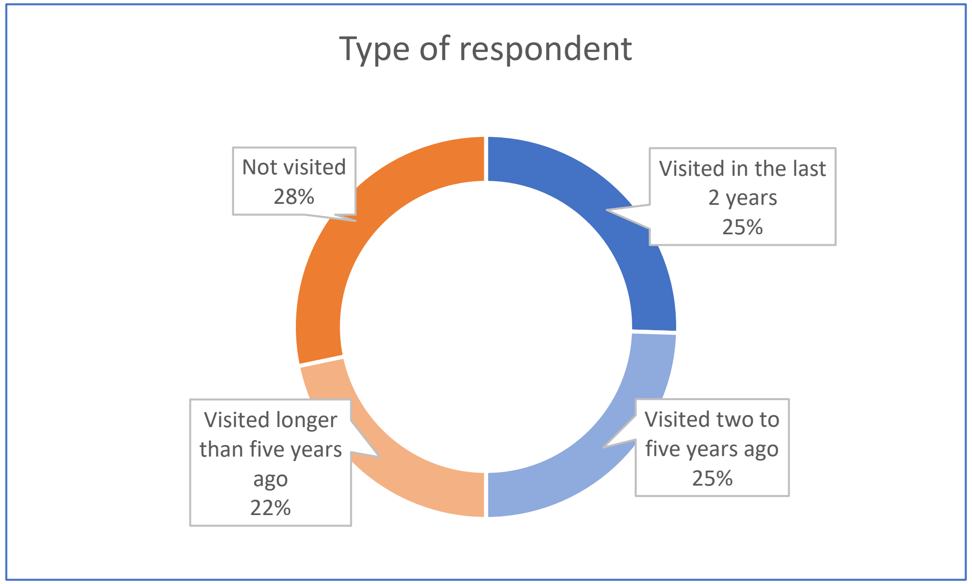


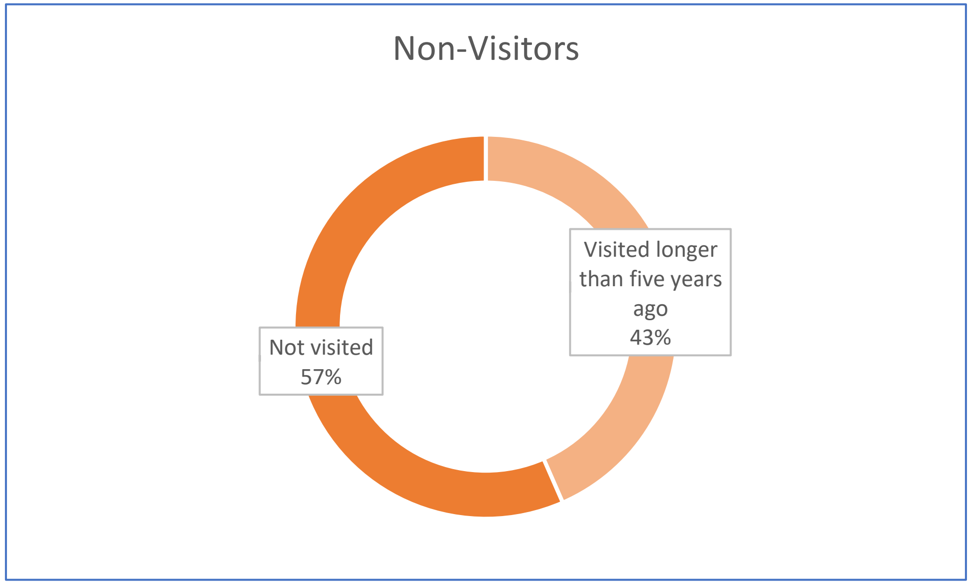
Survey Findings – Trip Behaviour

Trip Behaviour – Past Visits

Segmentation of respondents
The online sample included an equal split of visitors and non-visitors. Current visitors were made up of those who visited in the last two years (25%) and respondents that had visited one of the three destinations included in the survey two to five years ago (25%).

Similarly, non-visitors were also made up of two sub-groups. In this case, just over one in five (22%) accounted for those who visited longer than five years ago, and 28% of the overall sample were respondents that had not visited the district at all.





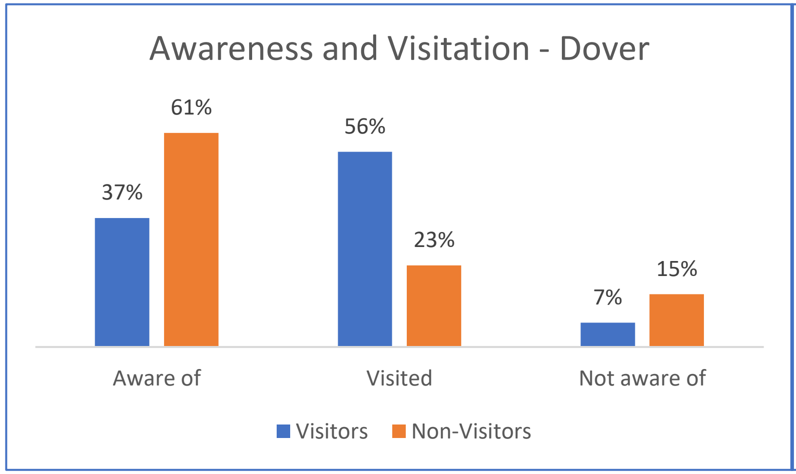
Trip Behaviour – Destination Awareness and Visitation

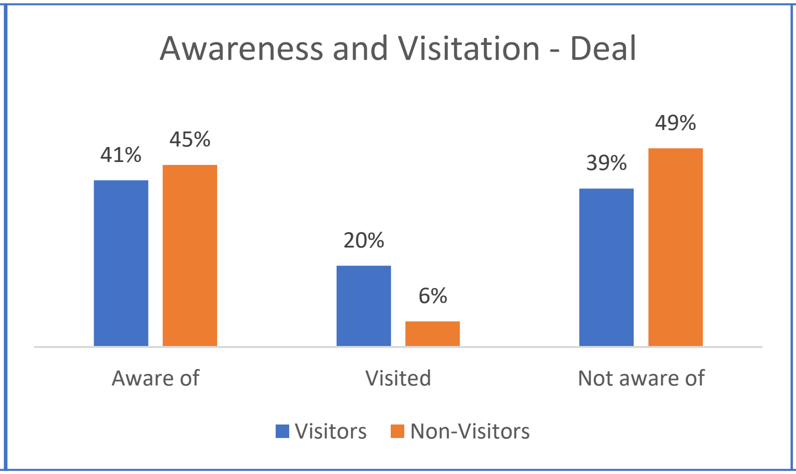
Awareness and visitation

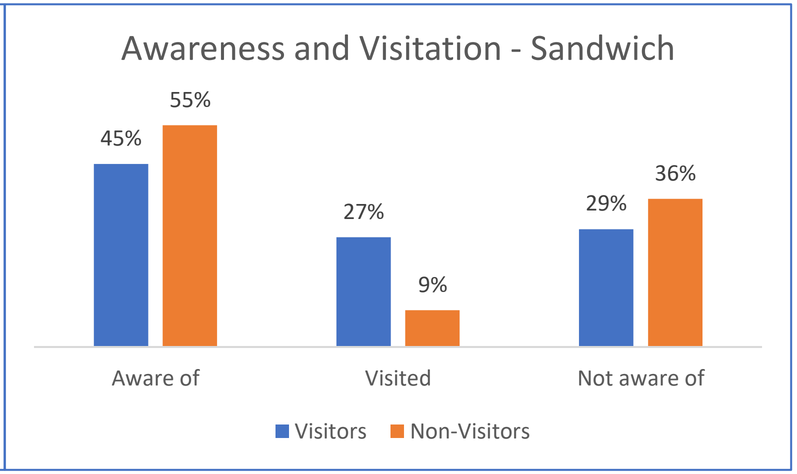
Respondents were asked to specify whether they were aware of the three destinations (Dover, Deal and Sandwich), and which, if any, they had ever visited for leisure. The vast majority of respondents, among both visitor and non-visitor groups, were aware of Dover. Just over half of all visitors to the district had visited Dover town and a quarter (23%) of those classified as non-visitors had actually visited, but longer than five years ago.

By contrast, Deal achieved the lowest levels of awareness between the three locations. Half of non-visitors to the district were not aware of Deal. Furthermore, two in five (39%) visitors to the district were not aware of Deal, indicating that they could have potentially visited the area for a specific reason, without exploring further.

Sandwich performed better, with higher awareness and visitation compared to Deal.





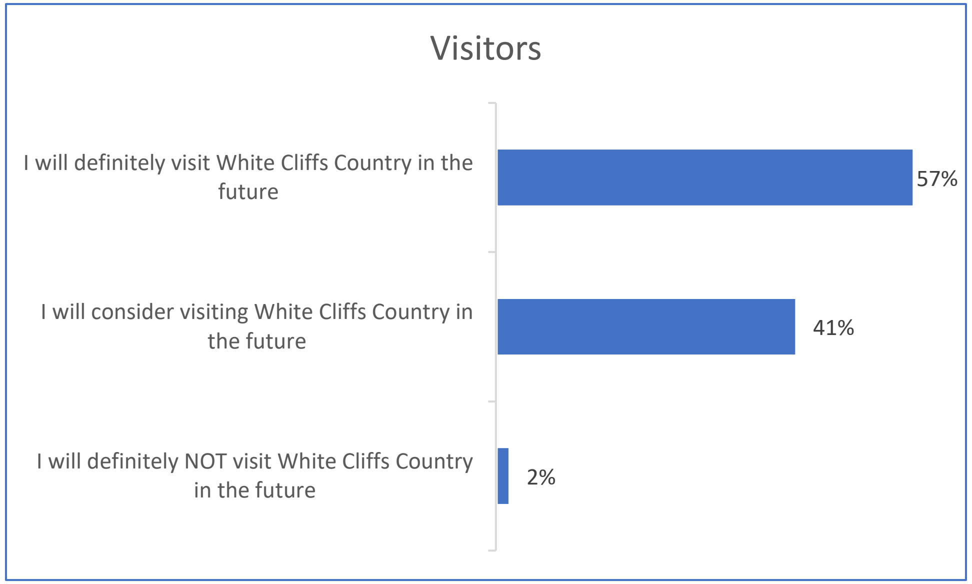


Trip Behaviour – Future Visits

Future visits - Visitors

Overall, intention to visit among visitors is high, with almost three in five (57%) current visitors indicating they will definitely visit White Cliffs Country again in the future, and with two in five (41%) considering a visit in the future. This highlights a strong opportunity to promote repeat visits to the area. Only 2% said they will definitely not visit White Cliffs Country.

When asked to explain the reasons why they would not consider visiting White Cliffs Country, respondents stated that they would prefer to go somewhere closer to home or go abroad, or that they 'don't know anything about White Cliffs Country'. Rejection is very low, which means that there is a strong opportunity to continue to convert visits from considerers who have explored the area in the last 5 years. Looking at some of the reasons given for not wanting to visit, it becomes clear that rejection is not likely based on a negative previous experience, which again is a positive aspect.



Why would you not consider visiting White Cliffs Country ...	Visitors
I would prefer to go somewhere closer to home	39%
I would prefer to go abroad	20%
I don't know anything about White Cliffs Country	20%
I have no reason to go there	10%
There are other places I want to go to more	10%
Other	1%
It would take too long to get there	0%
I feel that I have seen everything there is to see in White Cliffs Country	0%
I didn't really enjoy it last time I visited Dover	0%

Note: responses based on a small sample

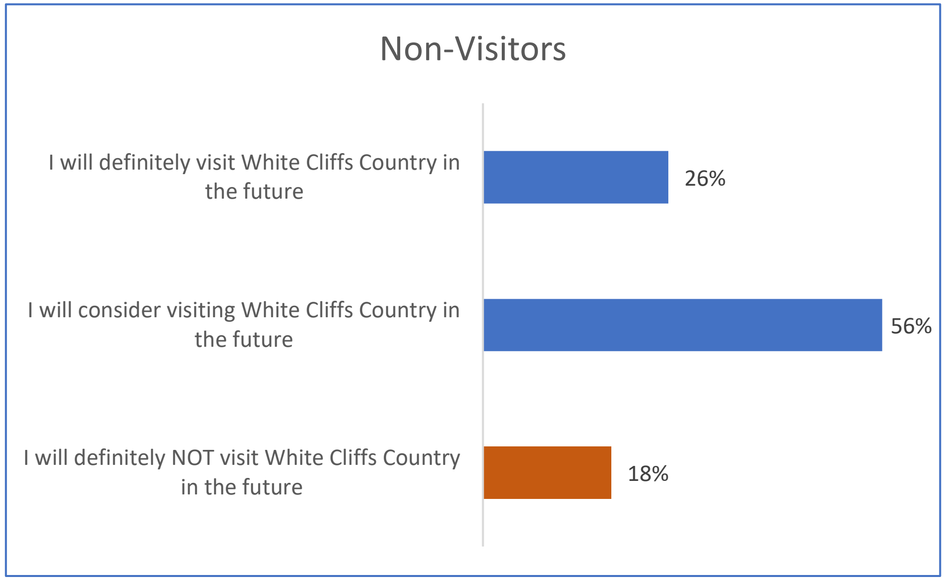
Trip Behaviour – Future Visits

Future visits - Non-visitors

It is encouraging to see that over half (56%) of non-visitors will consider a future visit to White Cliffs Country, and a quarter (26%) will definitely visit in the future. Having this large pool of considerers highlights a great opportunity to continue to engage and inspire these potential visitors, to turn intention into actual visits from this group.

Almost one in five (18%) said they will definitely not visit White Cliffs Country in the future. Note that these respondents (non-visitors who will definitely not visit in the future either) were excluded from the rest of the survey and were not counted in the overall sample. However, before ending the survey, when asked to explain the reasons why they would not consider visiting White Cliffs Country, the majority said ‘they have no reason to go there’ (31%), or that ‘there are other places I want to go to more’ (19%) and that they ‘would prefer to go abroad’ (16%).

To minimise the number of rejectors in the future, there is a need to ensure that marketing activity showcases ‘must’ reasons to visit, through clear and inspirational messaging. Focus should be placed on communicating authenticity, the fantastic product available, the experiences, the events that collectively make the destination stand out from competitors, in an effort to increase awareness and to attract new audiences.



Why would you not consider visiting White Cliffs Country ...	Non- Visitors
I have no reason to go there	31%
There are other places I want to go to more	19%
I would prefer to go abroad	16%
It would take too long to get there	12%
I would prefer to go somewhere closer to home	6%
I feel that I have seen everything there is to see in White Cliffs Country	6%
I don't know anything about White Cliffs Country	4%
Other	3%
I didn’t really enjoy it last time I visited Dover	1%

Survey Findings – Destination Associations

Destination associations

Key attributes - Visitors

Respondents were presented with a series of attributes and asked to select which destinations they associate with each attribute for Dover, Deal and Sandwich. The tables below highlight the top 5 associations, by location. The top association with Dover was ‘Long history’, just above ‘Family-friendly’, which, in turn, was the top association for both Deal and Sandwich. Being ‘Relaxing’ and ‘Beautiful’ are attributes also strongly related to Deal and Sandwich. It’s also worth noting that Dover is strongly associated with ‘Nature’ and with having a ‘Distinct identity’.

There were a number of attributes that were not strongly associated with Dover, Deal or Sandwich. Based on the responses we conclude that the White Cliffs Country destinations are not linked to specific age groups (‘More for the young’, ‘More for the old’) and it’s regarded as a seasonal destination (not ‘For all seasons’).

The positive associations are a great indication that strong attributes are used when thinking about Dover, Deal and Sandwich. These also highlight that the marketing efforts, campaigns and overall product and activity shared in the last few years is resonating with visitors, shaping an identity for the places in their minds. Efforts need to be sustained to make sure that these associations resonate with more and more visitors and that some of the less popular associations start gaining momentum as well. For instance, events and festivals, as well as experiences are a fantastic way to give people a reason to visit outside the summer season. They’re also great at appealing to visitors of different ages and attracting and promoting quality accommodation is key for getting visitors to stay longer.

Visitors	Dover
Long history	62%
Family-friendly	59%
Nature	57%
Beautiful	55%
Distinct identity	54%

Visitors	Deal
Family-friendly	44%
Relaxing	39%
Dog-friendly	36%
Beautiful	35%
Hidden gem	34%

Visitors	Sandwich
Family-friendly	42%
Beautiful	40%
Relaxing	39%
Traditional	37%
Authentic	36%

Visitors	None of these
More for the young	39%
Out of the ordinary	35%
For all seasons	33%
More for the old	32%
Quality accommodation	29%

Destination associations

Key attributes – Non-Visitors

Being 'Family-friendly' and 'Beautiful' are the two top associations for Deal and Sandwich, according to non-visitors. As was the case with visitors, the top association with Dover according to non-visitors was 'Long history', which is not surprising, given the historical prominence of the town.

The attributes least associated with Dover, Deal and Sandwich according to non-visitors are very similar to those identified by current visitors ('More for the young', 'More for the old', and 'For all seasons'). One difference is that less non-visitors associated 'Easy to get to' with White Cliffs Country. This would suggest that accessibility might be an issue to consider when targeting non-visitors and that emphasis should be placed on turning this around, particularly in the minds of potential visitors from further away. Clear, correct messaging around distances and transport options should be communicated to challenge this association and to encourage more people to consider visiting. Most likely, this association has also been fuelled by the negative media coverage around traffic disruptions at the border and Operation Brock, which was seen to a degree with regards to the whole county.

Non-Visitors	Dover
Long history	73%
Family-friendly	63%
Beautiful	62%
Distinct identity	62%
Traditional	61%

Non-Visitors	Deal
Family-friendly	51%
Beautiful	43%
Relaxing	43%
Dog-friendly	42%
Traditional	38%

Non-Visitors	Sandwich
Family-friendly	54%
Beautiful	51%
Relaxing	45%
Dog-friendly	45%
Traditional	45%

Non-Visitors	None of these
More for the young	57%
More for the old	46%
Out of the ordinary	44%
Easy to get to	39%
For all seasons	38%

Destination associations

Key attributes – Full tables for Visitors and Non-Visitors

Visitors	Dover	Deal	Sandwich	None of these
More for the young	32%	23%	19%	39%
Out of the ordinary	34%	22%	24%	35%
For all seasons	39%	32%	30%	33%
More for the old	34%	31%	29%	32%
Quality accommodation	43%	29%	31%	29%
Exciting	46%	26%	24%	26%
Hidden gem	33%	34%	32%	25%
Nostalgic	46%	26%	24%	25%
Lots to see and do	50%	28%	29%	23%
Dog-friendly	51%	36%	34%	22%
Easy to get to	53%	30%	31%	22%
Authentic	46%	28%	36%	20%
Traditional	50%	33%	37%	19%
Distinct identity	54%	24%	25%	19%
Relaxing	41%	39%	39%	18%
Family-friendly	59%	44%	42%	14%
Long history	62%	28%	31%	13%
Beautiful	55%	35%	40%	12%
Nature	57%	31%	28%	12%

Non-Visitors	Dover	Deal	Sandwich	None of these
More for the young	26%	16%	20%	57%
More for the old	28%	24%	31%	46%
Out of the ordinary	35%	24%	26%	44%
Easy to get to	49%	28%	30%	39%
For all seasons	45%	35%	37%	38%
Quality accommodation	46%	35%	41%	35%
Exciting	48%	22%	25%	35%
Dog-friendly	48%	42%	45%	33%
Hidden gem	33%	33%	38%	30%
Lots to see and do	52%	31%	35%	30%
Nostalgic	59%	25%	28%	27%
Relaxing	48%	43%	45%	24%
Distinct identity	62%	23%	32%	20%
Family-friendly	63%	51%	54%	18%
Authentic	58%	37%	40%	18%
Traditional	61%	38%	45%	17%
Long history	73%	31%	37%	13%
Beautiful	62%	43%	51%	12%
Nature	57%	31%	28%	12%

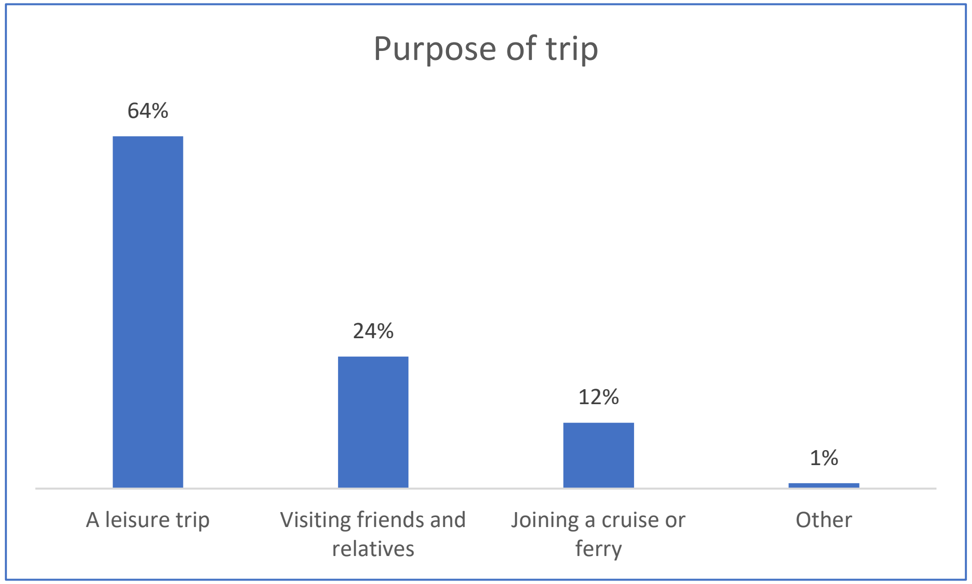
Survey Findings – Previous Visitation

Type of visit

Most recent visit to White Cliffs Country

Visitors were asked to provide some details about their most recent visit to White Cliffs Country. About two thirds (64%) took a leisure trip. A quarter were visiting friends or family and 12% were joining a cruise from Dover town.

Almost two in five respondents visited with their spouse or partner. Groups of friends accounted for 8% of the sample of visitors and 6% travelled alone. Family groups made up the rest of the sample (48%), including those travelling with other adult family members (14%) and families with children ranging from pre-school age children up to children 13 years and older. These types of visitors need to be taken into account when communicating and promoting the destination, to ensure the product and activities resonate with them. Thinking about what barriers these visitor groups could perceive and dispelling them could also potentially increase the number of visitors and their satisfaction.



Who did you travel with?	Percentage
My partner/spouse	38%
Children aged 5 - 12 years	15%
Other adult family members	14%
Children 13 years and older	10%
Pre-school age children	9%
Group of friends	8%
No one, I travelled on my own	6%
Other	0%

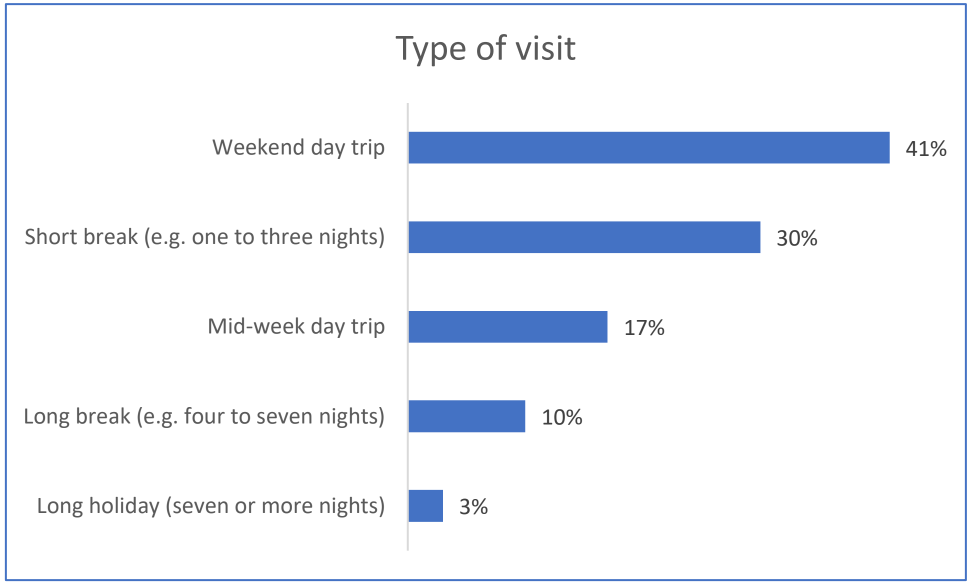
Type of visit

Most recent visit to White Cliffs Country

A weekend day trip was the most popular type of visit (41%), followed by short breaks of between one to three nights (30%).

Asked about the reasons for not staying longer on their most recent visit, one in three respondents said ‘it was just a day trip for one specific place, attraction or activity’ and similarly, 18% said they ’didn't need to stay any longer’. Time and financial pressures also played a part since 17% said they ‘couldn't get more time off work’ and 13% stating that they ‘couldn't afford to stay longer’. Touring was mentioned, as 14% of respondents said that ‘the visit to Dover was en route to or from a visit to Europe’ and 11% said the visit was part of a longer holiday that included other places in Kent.

These reasons highlight again the importance of communication and of sharing the right messages to turn some of these barriers into opportunities. First of all, given the popularity of weekend day trips, inspiring these visitors to stay longer by highlighting the breadth of activities available across the three towns could extend the length of stay for some. As already stated earlier in the report, promoting good, quality and quirky accommodation could also inspire people to stay longer. As already seen in the Kent-wide Perception Research, quality accommodation is the number 1 motivator to take a trip. The current financial pressures also need to be taken into account and deals and promotions are a great way of attracting visitors’ attention.

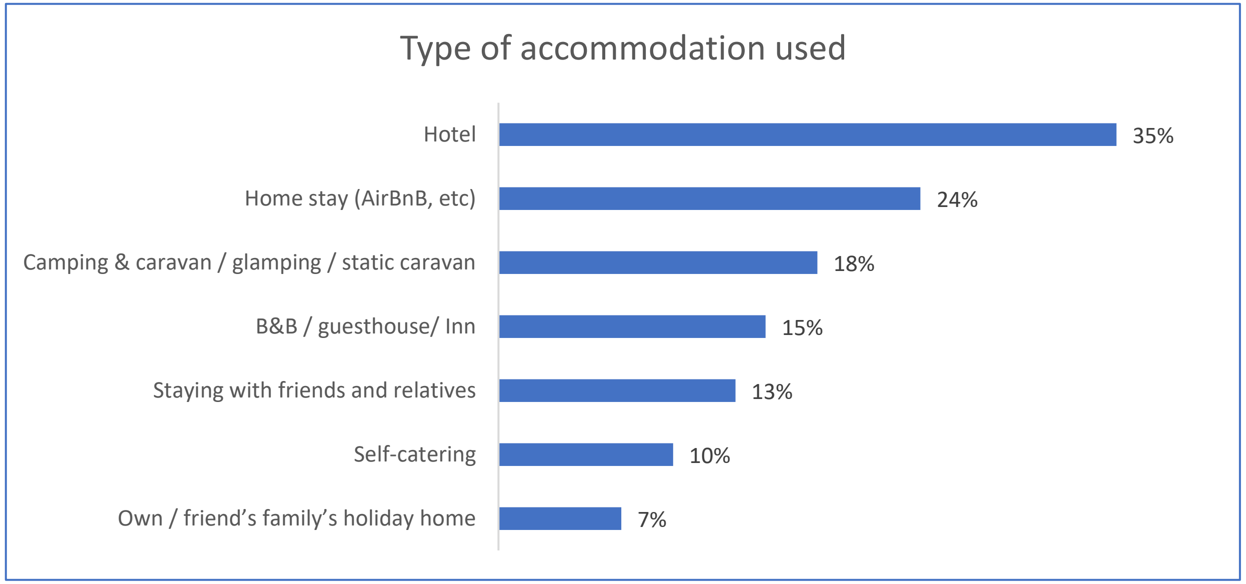


Why did you not stay longer on your most recent visit?	Percentage
It was just a day trip for one specific place/attraction/activity	29%
Didn't need to stay any longer	18%
Couldn't get more time off work	17%
The visit to Dover was en route to or from a visit to Europe	14%
Couldn't afford to stay longer	13%
The visit was part of a longer holiday that included other places in Kent	11%
Not enough to see and do to justify staying longer	11%
Couldn't find available accommodation	8%
Couldn't find affordable accommodation	4%
Other	**1%**

Accommodation used

Accommodation used in the most recent visit to White Cliffs Country

The majority of overnight visitors stayed in serviced accommodation establishments, including hotels (35%) and B&Bs and guesthouses (15%). Home stays, such as AirBnB, accounted for a quarter of stays (24%). This was followed by caravan and camping sites, including touring and static caravans as well as glamping (18%). There was also a significant proportion of visitors either staying with friends or relatives (13%) or using either their own or friend's or family's holiday homes (7%).



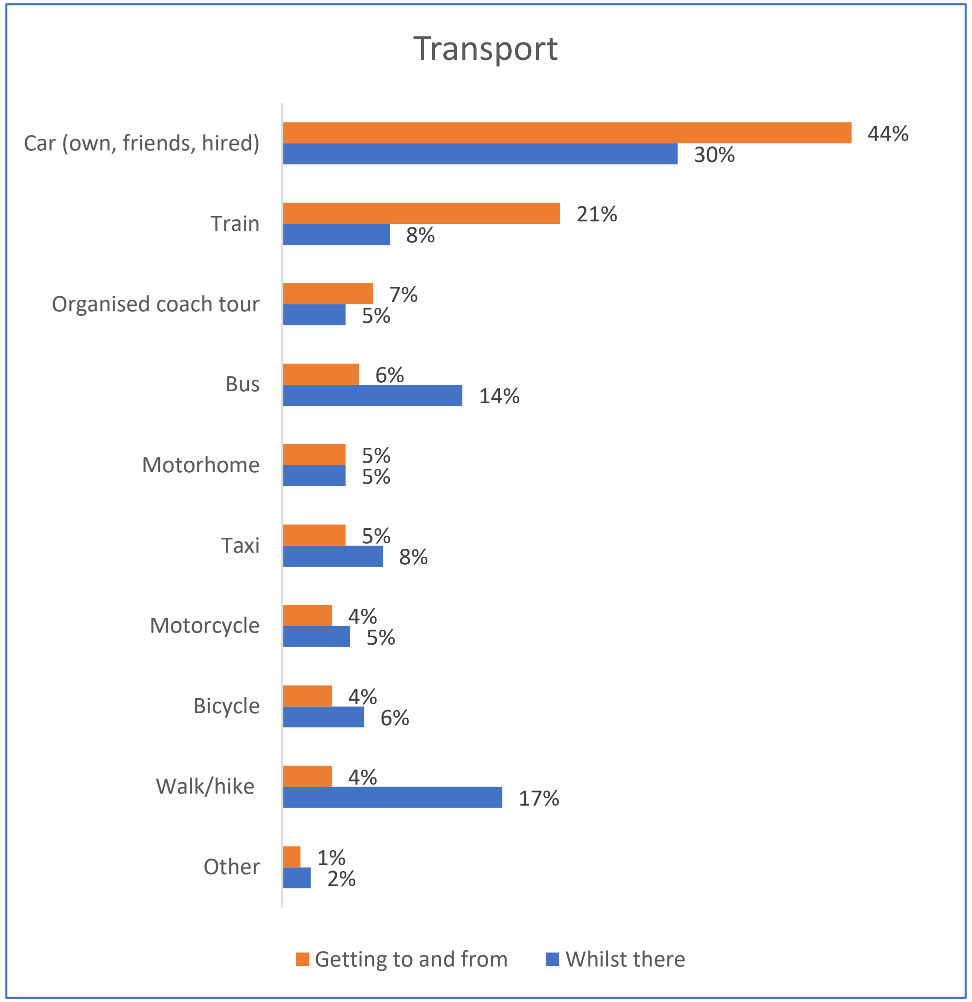
Transport

Transport usage
Transport used to get to and from White Cliffs Country included mainly cars (44%) and the train (21%), followed by organised coach tour (7%). All the other modes of transport listed had also been utilised, but by a smaller proportion of visitors.

Overall, the fact that more than half of the visits were done by other means of transport than the car is great not only as it reduces visitors' carbon footprint, but also from a traffic perspective and for the reliance on public car parks, which were key concerns in the face-to-face interviews. Whilst a reason could be all the negative media on traffic disruptions in the area, it also highlights an opportunity to continue to promote alternative modes of transport and to invest in the infrastructure needed to offer a great service to visitors.

Once at the destination, one in three continued to use the car but there was also a significant increase in the proportion of visitors who walked (17%) or who took buses (14%).

This indicates that once in the destination, visitors consider various modes of transport to enjoy their trip. In order to increase take-up further, it is important to communicate alternative travel options and to signpost nearest stations, making sure the information provided is accurate, to allow visitors to make informed decisions and to avoid dissatisfaction caused by having the wrong facts.



Activities

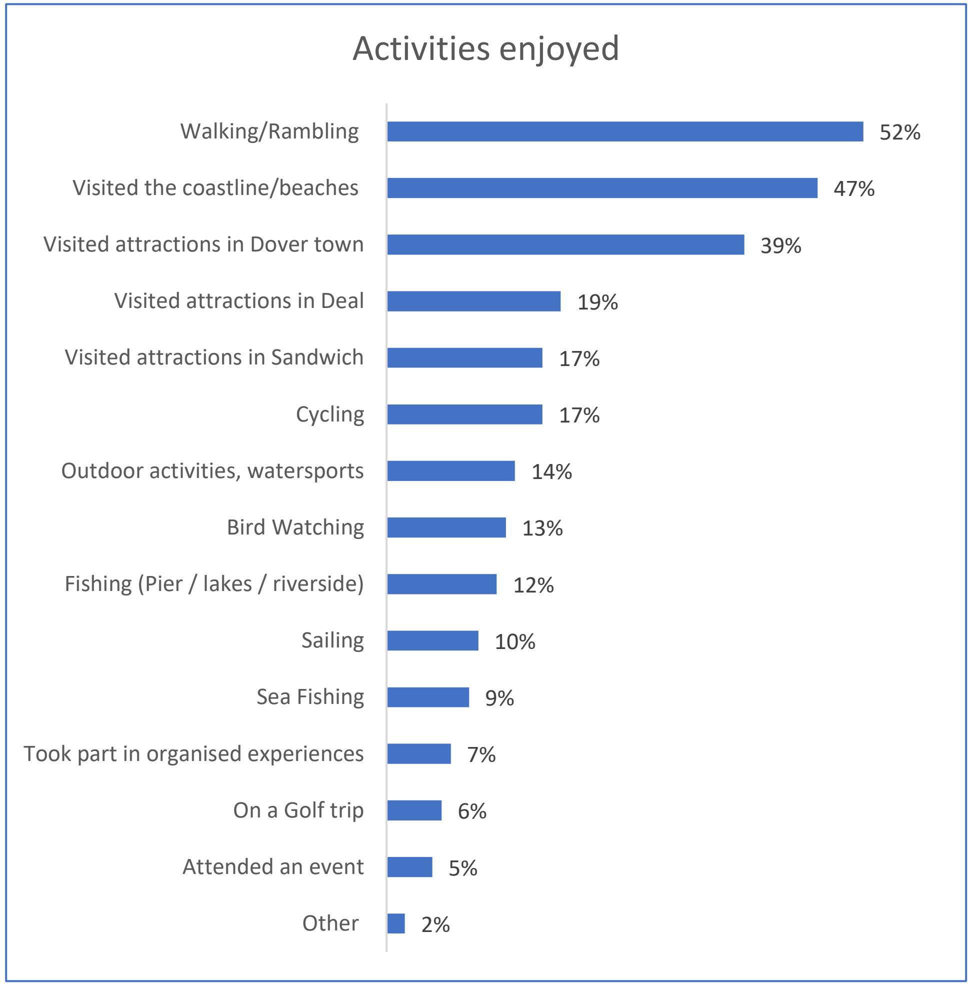
Activities enjoyed

The two most popular activities, enjoyed by about half of all visitors to White Cliffs Country were going for a walk or ramble (52%) and visiting the coast and the local beaches (47%).

Two in five visited attractions in Dover town, followed by visits to attractions in Deal (19%) and Sandwich (17%). The next page shows a list of the most popular attractions visited for each one of the three destinations.

Other popular activities included cycling (17%), outdoor activities (including Watersports), bird watching and other water-based activities (fishing, sailing).

On top of focusing on continuing to increase visitation to attractions and outdoor pursuits, there's an opportunity to further promote experiences, as trends for 2024 show that there is a big demand for experiential visits, so raising awareness around what's available in destination, that's unique and authentic to the place, could inspire additional visits.



Attractions

Attractions visited during the last trip

Unsurprisingly, Dover Castle and the White Cliffs of Dover were the most popular attractions visited in Dover town.

The top attractions visited in Deal were the Deal Seafront and Pier (51%) and Deal Castle (50%).

There were a range of similarly popular attractions in Sandwich, including the Sandwich Bay Bird Observatory (31%), Guildhall Museum and the St Peter's Church and Haven Heights (30% each), the Richborough Roman Fort (29%) and Wingham Wildlife Park (27%).

All these top attractions are clearly key hooks for the destinations. Whilst these can still be utilised as main draws, it is important to note, particularly for those who have visited before, the need to always showcase different angles and experiences to encourage future visits that differentiate from previous ones, giving people new reasons to travel and new aspects to discover.

Attractions visited in Dover town	Percentage
Dover Castle	69%
The White Cliffs of Dover	60%
Dover Marina Curve and Pier	29%
Dover Museum & Bronze Age Boat Gallery	23%
Battle of Britain Memorial	20%
South Foreland Lighthouse	14%
Sea Safari	13%
Fan Bay Deep Shelter	8%
Samphire Hoe	6%
Lydden Hill Race circuit	4%

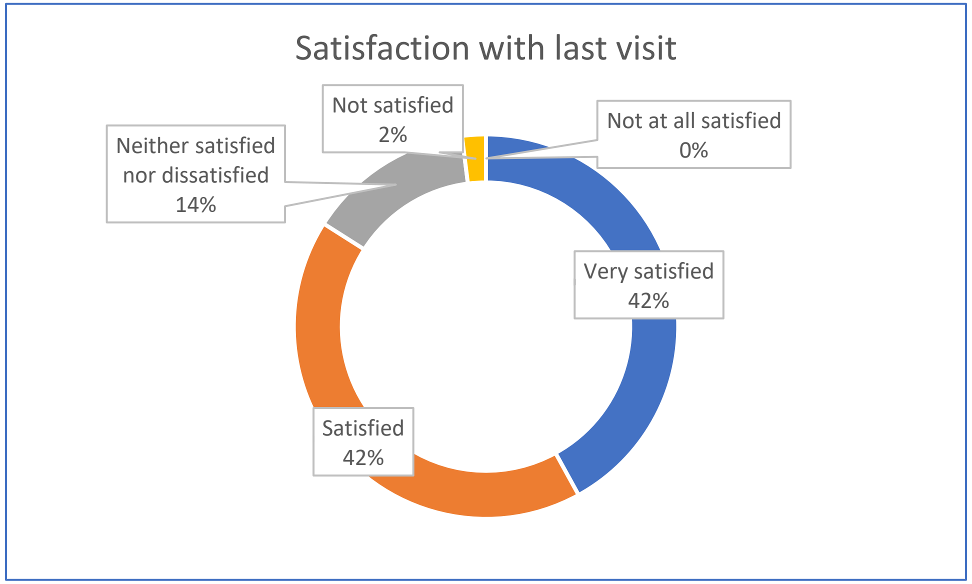
Attractions visited in Deal	Percentage
Deal Seafront and Pier	51%
Deal Castle	50%
Walmer Castle and Gardens	39%
Deal Maritime Museum	26%
Mining Museum	25%
Tides Leisure Centre	24%
Timeball Tower Museum	22%
Roman Landings Adventure Golf	17%
Betteshanger Park	13%
Solley's Ice Cream parlour and farm	12%

Attractions visited in Sandwich	Percentage
Sandwich Bay Bird Observatory	31%
Guildhall Museum	30%
St Peter's Church and Haven Heights	30%
Richborough Roman Fort	29%
Wingham Wildlife Park	27%
White Mill Rural Heritage Centre	21%
Goodnestone Park Gardens	21%
River Runner boat tours	19%
Whitemills Wake and Aqua Park	17%
P22 Gunboat	13%

Satisfaction

Satisfaction with last visit

Taking every aspect of their trip into consideration, two in five respondents said they were 'very satisfied' with their last visit to White Cliffs Country, and a further 42% said they were 'satisfied'. Only one in seven (14%) said they were 'neither satisfied nor dissatisfied'. Unfortunately, 2% said they were not satisfied with their visit.

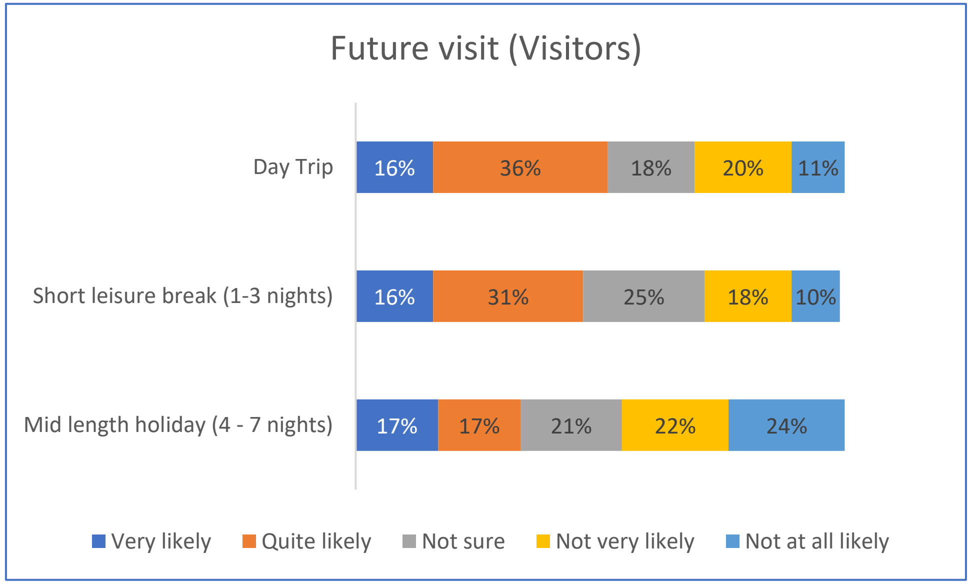


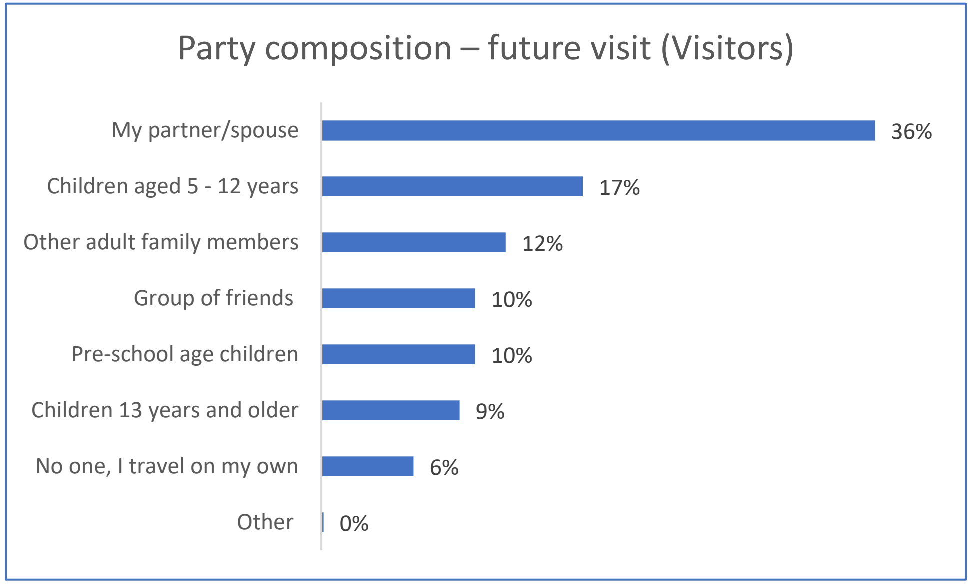
Survey Findings – Future Visitation

Future visits

Future trips to White Cliffs Country - Visitors
Current visitors are quite likely (36%) or very likely (16%) to take a day trip to the area in the next 12 months. A short leisure break would be their second option, with 31% saying they would quite likely choose that option and 16% saying it's very likely that their next visit would be a short break. As expected, less people indicated an appetite for longer holidays, with 34% indicating they are very likely or quite likely to opt for this.

About a third would visit with their partner or spouse (36%), followed by younger families (17%) and adults with other adult family members (12%).



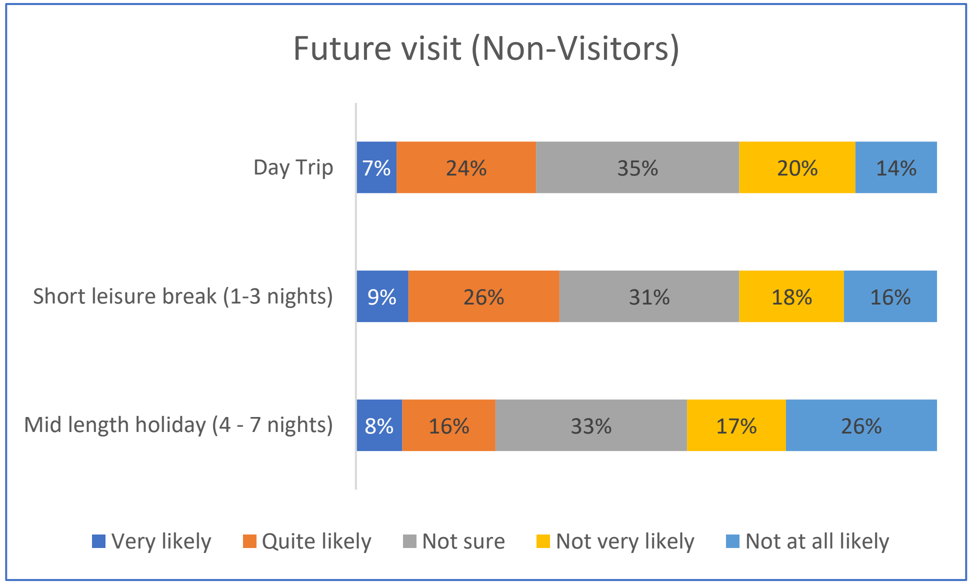


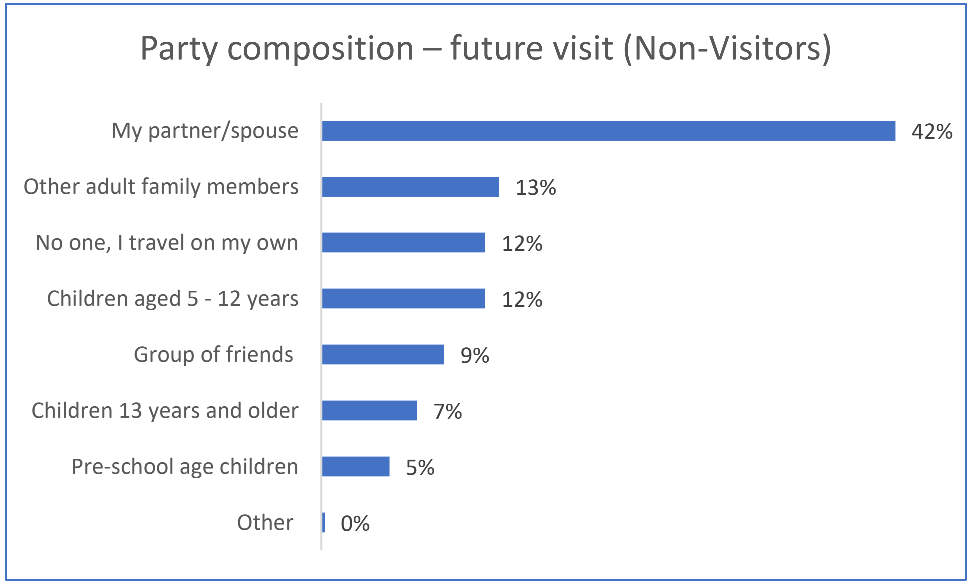
Future visits

Future trips to White Cliffs Country – Non-Visitors

The sample of non-visitors included only those who said they would consider a future trip to White Cliffs Country. Unlike with current visitors, non-visitors selected short breaks as the most popular type of future visit, saying they were likely (26%) or very likely (9%) to choose this option above day trips or longer stays in the next 12 months. Given that these are people that have either not visited before or have visited a long time ago, these good proportions of people that are either very or quite likely, as well those who are unsure represent a growth market potential, so it will be important to target them through tailored messages and tone of voice, to inspire them to turn likelihood into visitation.

About two in five would visit with their partner or spouse, followed by adults visiting with other adult family members (13%), those visiting alone and families with children aged 5 to 12 years (12% each).





Future visits

Sources of information

The main sources of information likely to be used by both visitors and non-visitors when planning a future visit to White Cliffs Country include general online searches, visits to review websites (e.g., TripAdvisor, Booking.com, Expedia), visits to destination websites (e.g. whitecliffscountry.org.uk, visitkent.co.uk), visits to the specific attractions' websites and recommendations from friends or family and from social media.

This clearly shows the appetite for online sources when seeking out information and inspiration, with four digital channels being selected in the top 5. It is important therefore to ensure these online sources are kept up-to-date, with inspiring content and imagery showcasing the assets of the destinations. That being said, there is still a market for offline channels, which, albeit smaller, should be considered. The challenge here is that it is easier for print to become out of date, so this needs to be factored in.

Resources likely to use when planning a future visit to White Cliffs Country	Visitors	Non-Visitors
General online search	41%	59%
Visit review websites (e.g., TripAdvisor, Booking.com, Expedia)	34%	42%
Visit a destination website (e.g. whitecliffscountry.org.uk, www.visitkent.co.uk,)	25%	31%
Visit the specific attractions' websites	21%	31%
Recommendations from friends or family	27%	27%
Look for recommendations on social media	27%	20%
Visit the Visitor Information Centre	18%	20%
Use a travel guidebook	14%	17%
Look through destination brochures and leaflets (eg., White Cliffs Country guides)	16%	16%
Use a travel guide or tour operator app (e.g., Explore Kent)	17%	11%
Use a specific attraction app	13%	9%
None of these	5%	9%
Opinions of bloggers and influencers	12%	8%
Read an article in a magazine or newspaper	10%	7%
Used to live in Dover so already have knowledge of the area	9%	4%
Other	0%	0%

Sustainability

Sustainability measures
Clean, unpolluted beaches, parks and green spaces, opportunity to 'shop local'/support independent businesses, actions to protect the natural landscape and environmentally-friendly activities are the most important measures respondents like to see when visiting somewhere in England on a short break or a holiday. Overall, sustainability measures rated highest among non-visitors.

As trends show, sustainability is an increasingly important decision influencer when selecting a destination. Interesting to note, that as was the case in the Kent Perception Research, the sustainability aspects of most importance are those that also have personal benefit. For example, people want to visit places where beaches and parks are clean, where the natural landscapes are protected not only because it is the right thing, but also because it positively impacts their experience visiting. It is important to communicate what actions are being taken to make sure these steps are implemented as it will resonate with visitors and align with wider sustainability policies and initiatives.

Importance of sustainability measures	Visitors	Non-Visitors
Clean, unpolluted beaches, parks and green spaces	50%	62%
Opportunity to 'shop local'/support independent businesses	38%	46%
Actions to protect the natural landscape	32%	43%
Environmentally-friendly activities	31%	40%
Food miles and local provenance	25%	26%
Control on numbers of visitors to protect specific areas	24%	27%
Eco-friendly accommodation	24%	30%
Mode of travel, availability of green transport (e.g. hybrid-engine buses, bike hire)	22%	27%
Use of Green Tourism accreditation certificates/labels	18%	22%

Multiple responses allowed.

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