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Dover Town Visitor Survey

November 2023

DOVER DISTRICT COUNCIL

white cliffs country
VISIT DOVER DEAL SANDWICH

Contents:

Introduction:

This report presents the key findings of the Dover Town Visitor Survey. This research 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 to Dover, 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-Dover 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 Dover, 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 Dover only. The results for Deal and Sandwich are presented in separate reports.

Executive Summary:

Visitor Profile

- Visitors were spread across the age groups – 10% of all visitors were children and 51% were over the age of 45 years.
- Couples and family units accounted for two thirds of all visiting groups. The gender split was almost equal, with 49% male respondents and 51% female.
- The average group size was 2.28 people, comprising of 2.06 adults and 0.22 children.
- In terms of where were visitors to Dover from, 77% were from the UK and 23% were from overseas. 59% of UK respondents were from the South East.

Trip Characteristics

- Most (84%) were visiting for leisure or a holiday and few (8%) to see friends or relatives.
- 30% were visiting Dover for the first time, with the repeat visitor market accounting for the majority of all visitors to Dover (70%).
- Two thirds of all visitors were 'day visitors from home' (65%). The majority of all day visitors stayed in Dover all day (60%) and a further 39% stayed for half a day.
- Over a third of visitors (35%) were in Dover as part of an overnight stay. On average, overnight visitors who stayed in Dover (69%) spent 3.26 nights away from home.
- Those staying outside Dover 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 hotels (37%), followed by the homes of friends or relatives (26%).
- The majority (90%) of overnight visitors staying in paid accommodation rated the level of service received positively ('good' or 'very good'). Similarly, 85% thought their accommodation offered 'good' or 'very good' value for money.
- Overnight visitors were most likely to book directly with the accommodation provider, with two in five (42%) using this method.

Executive Summary:

Transport

- The car was the most common mode of transport used by visitors to reach Dover, chosen by 60% of respondents.
- More than two thirds of car drivers (69%) 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 Dover (per person per 24 hours) on accommodation, eating out, shopping, entertainment and transport was £53.89.
- Day visitors from home who are visiting Dover spent an average of around £28.10 per person per day in the town.

Activities undertaken and associations

- Walking and rambling were the most popular activities undertaken by visitors to Dover, enjoyed by 44% of visitors overall. 29% have visiting the coastline/beaches as part of their trip (29%) and attending an event (15%) are also driving visitation to the town.
- The **best** things about Dover according to visitors were the top attractions (Dover Castle, White Cliffs) as well as history, heritage and the local museums. The seafront and the sea views, the marina, shopping options and events and festivals are also perceived as key assets of the town.
- The **challenging** things about Dover related to the overall aspect of the town centre and the High Street, as well as the number of empty shops and the limited variety of shops.

Sources of information

- Almost a third (62%) 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 Dover using a scale of 1 (very poor) to 5 (very good). Finding their way round the town (road signs) and History and heritage achieved the highest scores (4.58 out of 5), followed by pedestrian signage (4.53) and the feeling of welcome (4.50)
- The scores for shops and public toilets are particularly low when compared to the average for the three towns (Dover, Deal and Sandwich)
- In terms of overall enjoyment of the visit, 46% of visitors to Dover rated their enjoyment as 'very high' and a further 43% rated it as 'high'. These results are above the ratings achieved in 2017.
- Overall, 47% of visitors to Dover felt that the likelihood of them recommending the town to somebody else was 'very likely' and a further 40% said it was 'likely'.

Survey Findings – Visitor Profile

Visitor Profile – Group composition

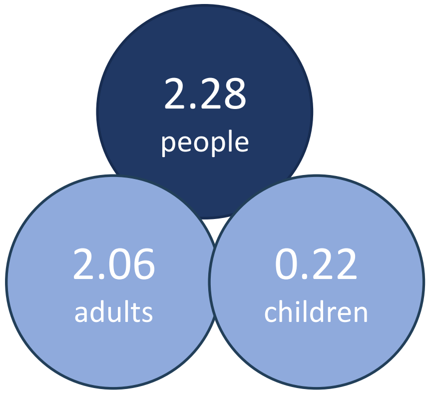
Age groups

Visitors were spread across the age groups. Children under 16 accounted for 10% of visitors. Overall, 51% of all visitors were over the age of 45 years.

The average group size was 2.28 people, comprising of 2.06 adults and 0.22 children. The gender split was almost equal, with 49% male respondents and 51% female. The 2023 results include smaller groups, with less children and more adult aged 45 and over, compared to the 2017 survey.

Couples (39%) and family units (27%) accounted for two thirds of all visiting groups. Those travelling alone accounted for 14% and groups of friends made up 13% of the sample.

Visiting group



Group composition	2023	2017
A couple	39%	34%
Family unit	27%	33%
Alone	14%	13%
Groups of friends	13%	12%
Intergenerational family (with grandparents)	3%	5%
Extended family (with relatives and / or friends)	2%	3%
Specialist / interest group	1%	0%
Other	0%	0%

Age group composition			
	Male	Female	Total
0-15	6%	4%	10%
16-24	4%	4%	8%
25-34	7%	8%	15%
35-44	7%	9%	16%
45-54	7%	9%	16%
55-64	9%	8%	17%
65+	9%	9%	18%
Total	**49%**	**51%**	**100%**

Age group composition 2017			
	Male	Female	Total
0-15	12%	10%	22%
16-24	3%	3%	6%
25-34	6%	7%	13%
35-44	6%	9%	15%
45-54	7%	7%	14%
55-64	7%	7%	13%
65+	8%	8%	16%
Total	**49%**	**51%**	**100%**

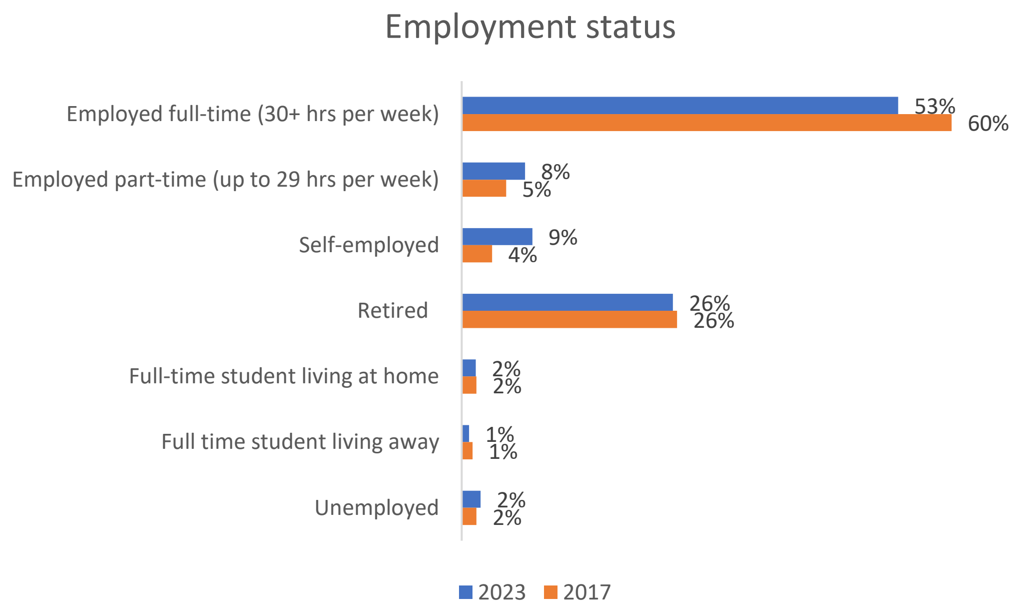
Visitor Profile – Employment

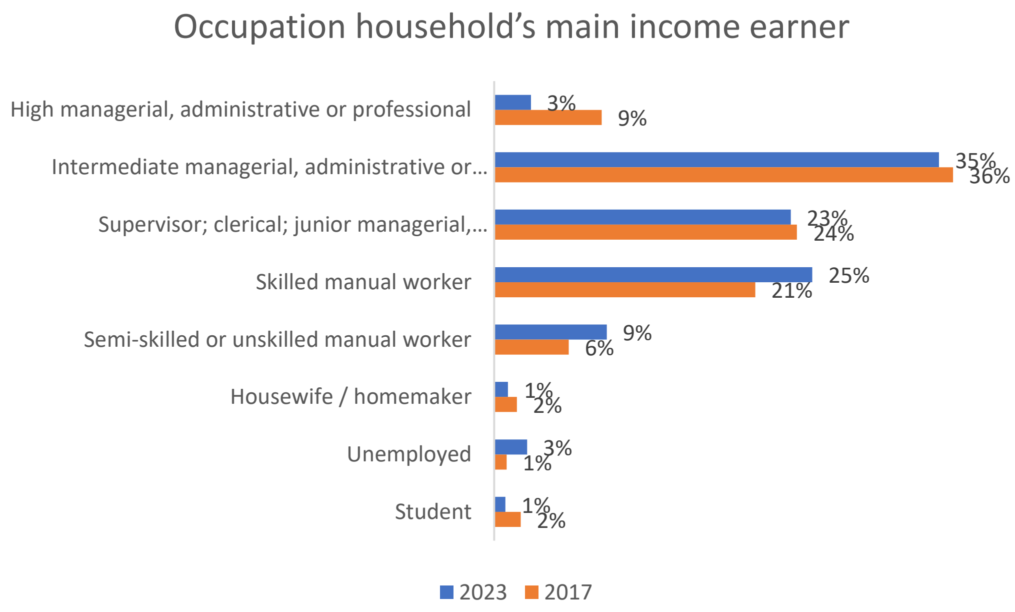
Employment status and occupation

Just over half (53%) of visiting groups contained a chief income earner who was in employment full time at the time of the survey. Around a quarter of all visitors were retired.

Occupation

The largest proportion of respondents (35%) were in middle managerial roles. Skilled manual workers (21%) and junior managerial roles (23%) followed.





Visitor Profile – Origin of visitors

About six in ten (59%) of respondents were from the South East. This was followed by those who lived in London (23%), which shows a large increase compared to the 2017 sample, and visitors from the East of England (8%).

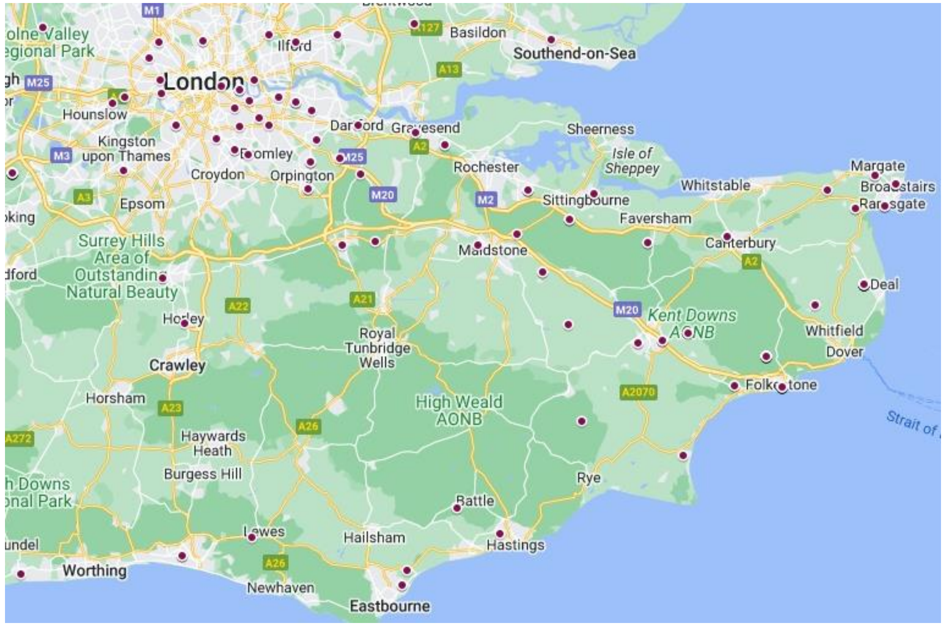
There were large concentrations of respondents from Kent, which accounted for 43% of respondents, and in particular visitors from Folkestone (10%), Deal (6%), and Canterbury (6%). See maps below and right.

Almost a quarter (23%) were residents from 15 other countries, mainly USA (8%), Germany (4%), Canada (2%), Belgium and Netherlands (2% each).

Of the 23% of overseas residents, 8% arrived on a cruise, and the majority (5%) were USA citizens.

23%
Overseas

Respondent distribution by home location		
	2023	**2017**
South East	59%	65%
London	23%	9%
East of England	8%	10%
Yorkshire and Humber	2%	2%
South West	2%	2%
West Midlands	2%	2%
East Midlands	1%	2%
North West	1%	1%
Northern Ireland	1%	0%
North East	0%	1%
Scotland	0%	1%
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 (84%). A minority of visitors (representing 8% of all visits) were visiting Dover to see friends or relatives. Shore visit from cruise ships accounted for 3%, whilst special shopping trips accounted for a further 1%.

Purpose of visit	2023	2017
Leisure/Holiday	84%	87%
Visiting friends/relatives	8%	6%
Shore visit from cruise ship	3%	2%
(Non-regular) Shopping trip	1%	3%
On a Golf trip	0%	0%
Other	4%	3%

First time or repeat visitors?

Three in ten (30%) were visiting Dover for the first time, with the repeat visitor market accounting for a larger proportion of all visitors to Dover (70%), compared to 2017 (65%). Looking at the split between domestic and overseas respondents, 80% of UK respondents had visited Dover before, whereas only 39% of overseas respondents were repeat visitors.

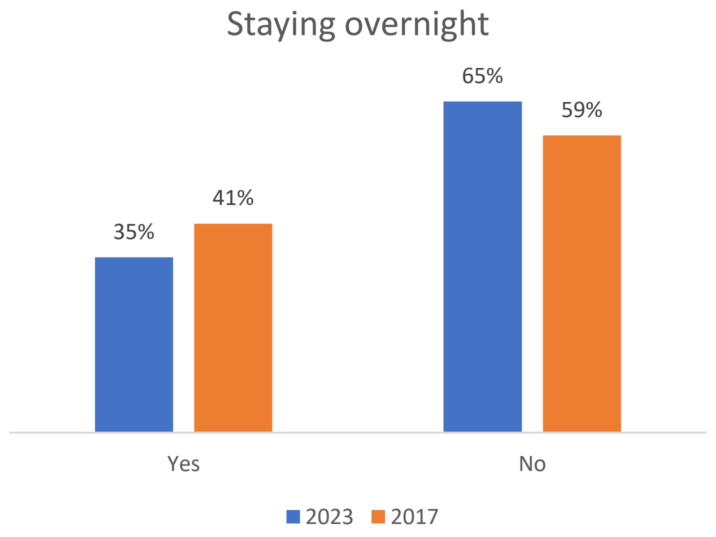
Have you visited the area before?	2023	2017
Yes	70%	65%
No	30%	35%

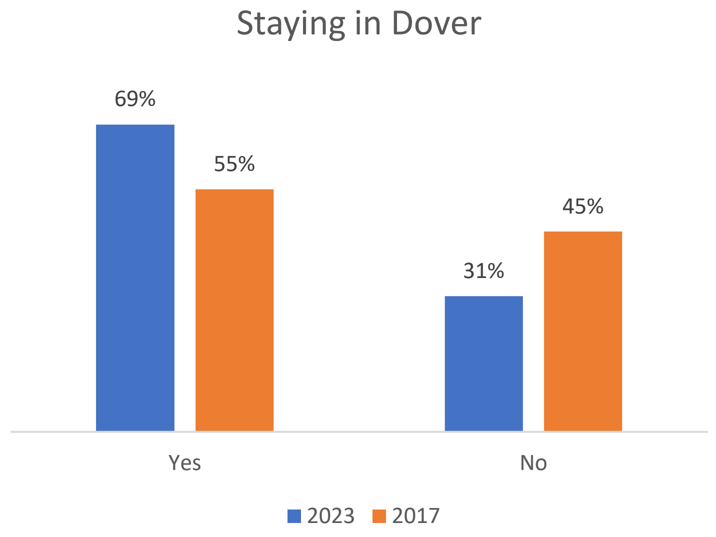
Trip Characteristics

Day trips or overnight stays?

About two thirds (65%) 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 35% were in Dover as part of an overnight stay. However, not all overnight visitors were staying in Dover town. The results show that 69% of overnight visitors interviewed were staying in Dover and 31% were staying elsewhere.

Compared to the 2017 data, whilst we are seeing an increase in the proportion of day trips, which is in line with trends around more local visitation and the cost of living, a greater proportion of those staying overnight did so in destination.





Where else are they staying?

The largest proportions of overnight visitors stayed in Kent, particularly Folkestone, Canterbury, and Ashford.

Destination	Percentage
Folkestone	26%
Canterbury	14%
Ashford	9%
New Romney	5%
Capel	5%
Martin Mill	5%
Lynton Acres	3%
Chatham	3%
Deal	3%
Broadstairs	3%
Capel Le Ferne	3%
Margate	3%
London	3%
Sandwich	3%
Alkham	3%
Hawkinge	3%
St Margaret's	3%
Hastings	3%

Trip Characteristics

Reasons for not staying in Dover

Those staying outside Dover were asked their reasons for not staying in the town. The most common response was simply that people were holidaying elsewhere (57%). Almost two in five gave 'other' reasons, primarily related to staying with friends and relatives based elsewhere but also because they own a second property nearby or because they found accommodation of their liking elsewhere.

Reasons for not staying overnight	2023	2017
Holidaying elsewhere	57%	60%
No decent accommodation	5%	1%
It is not an appealing place to stay	0%	10%
Lack of availability	0%	2%
Too expensive /cheaper elsewhere	0%	2%
Other	38%	26%

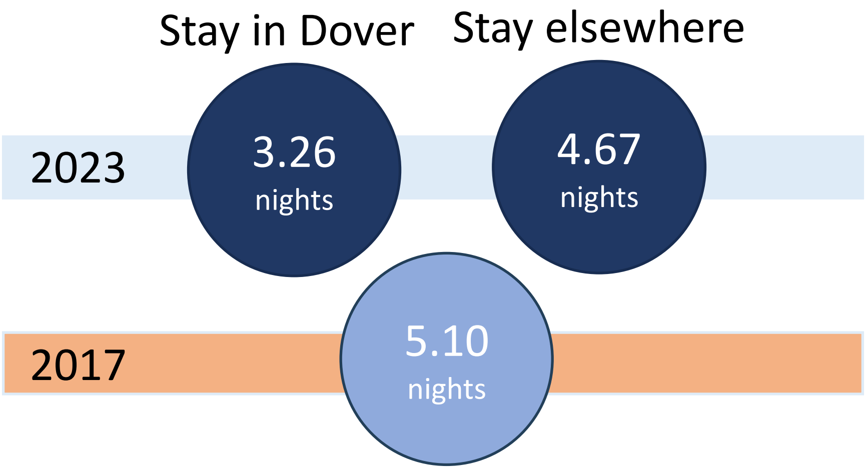
Day Trip duration

The majority of day trippers (60%) visited Dover for the whole day, followed by 39% who visited the town for half a day. Only 1% were in destination for under two hours. This indicates an opportunity to further communicate not only the fantastic product that is available, but also the range of accommodation, either in Dover or Deal and Sandwich, to inspire more people to stay overnight in the district.

Day trip duration	2023	2017
Less than two hours	1%	10%
Half a day	39%	43%
All day	60%	47%

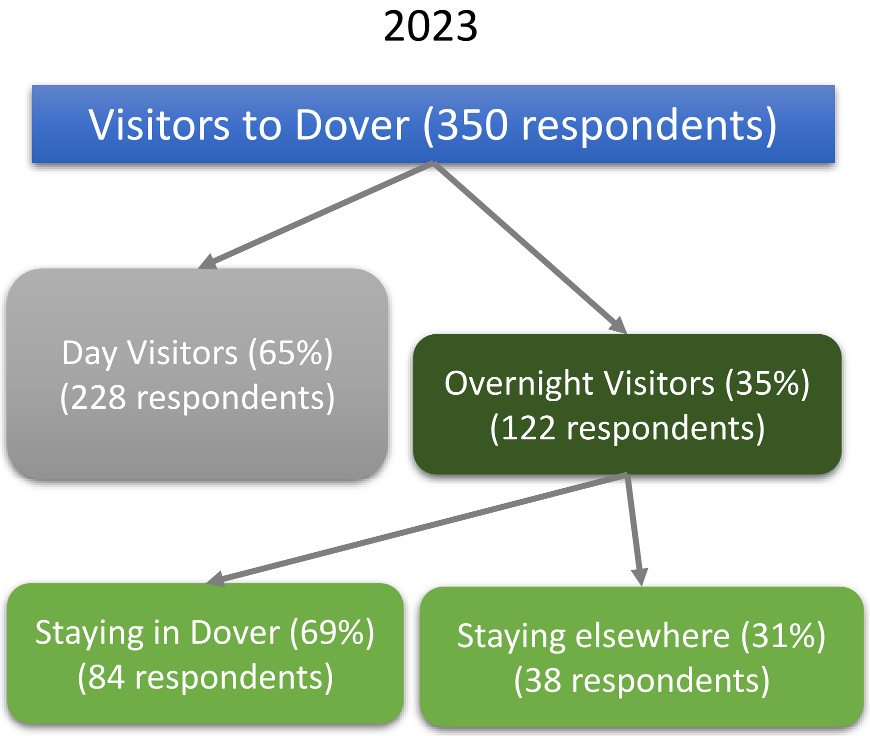
Overnight Trip duration

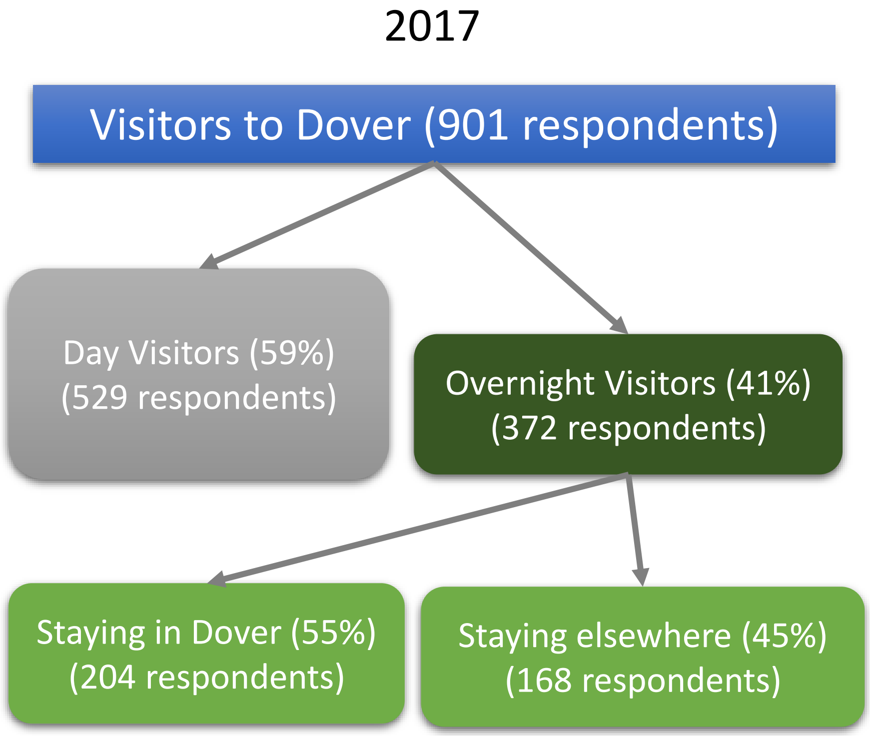
On average, overnight visitors staying in Dover spent 3.3 nights away from home. Those who stayed elsewhere spent 4.7 nights away. This is less than in 2017, but in line with regional and national trends that indicate a bigger appetite for shorter breaks.



Sample composition – 2023 and 2017 comparison

Just under two thirds (65%) of respondents to the 2023 survey were visiting for a day trip. The remaining 35% were staying overnight. However, as it was the case in 2017 not all overnight visitors were staying in Dover town. The results show that 69% of overnight visitors interviewed were staying in Dover and 31% were staying elsewhere.

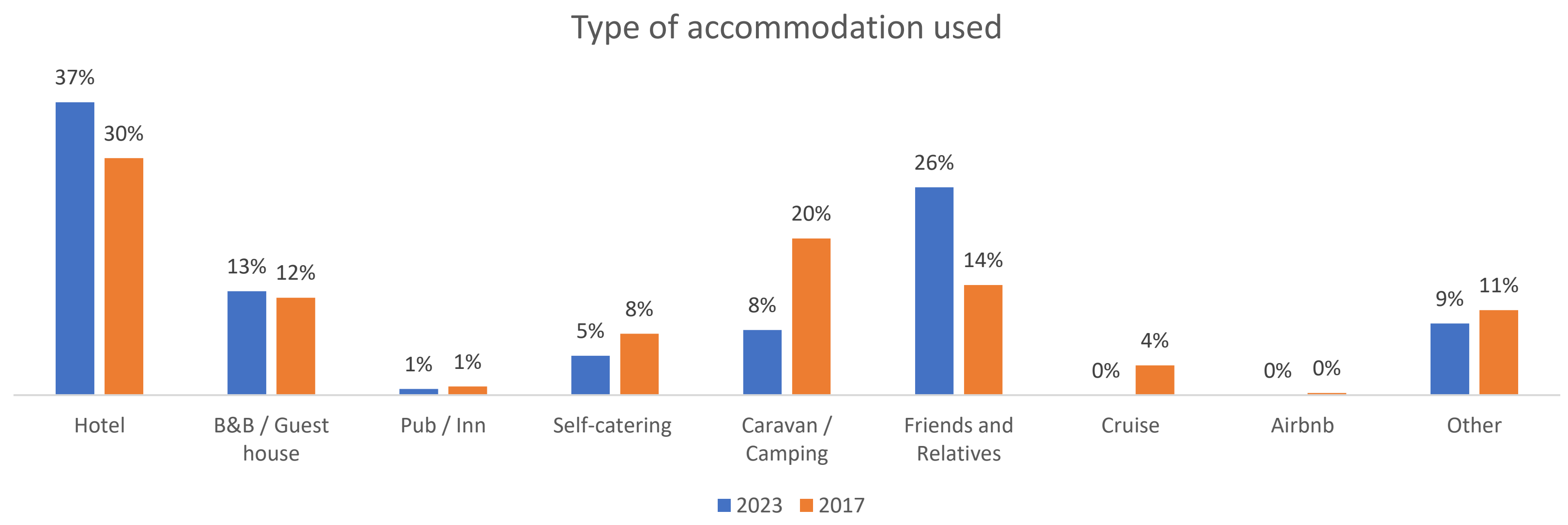




Trip Characteristics

Overnight trip - Accommodation used

The majority of overnight visitors stayed in hotels (37%), up from 30% in 2017. A quarter (26%) stayed in homes of friends or relatives, also up from 2017 when this accounted for 14% 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. Touring caravan and camping sites experienced the largest drop since 2017 (down to 8% from 20% in 2017). Other accommodation included yachts moored at the harbour, static caravans and motorhomes.



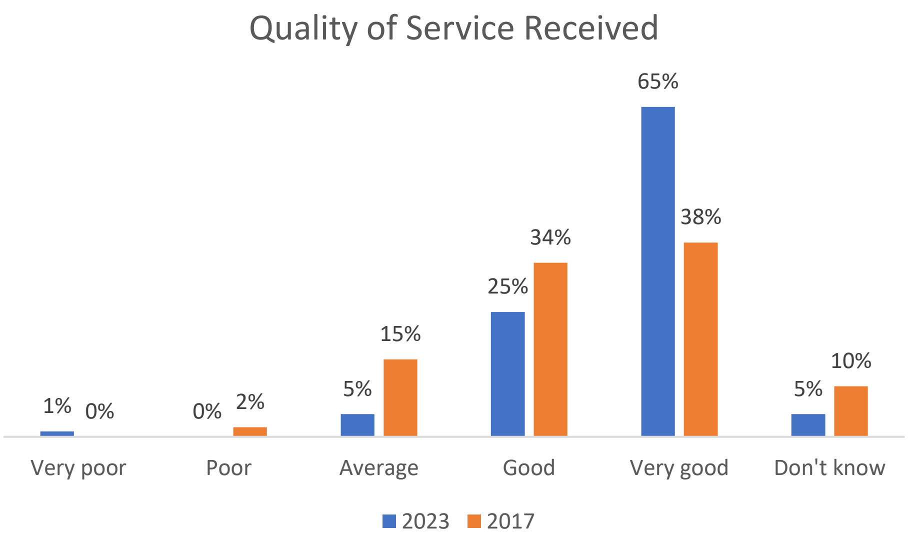
Trip Characteristics

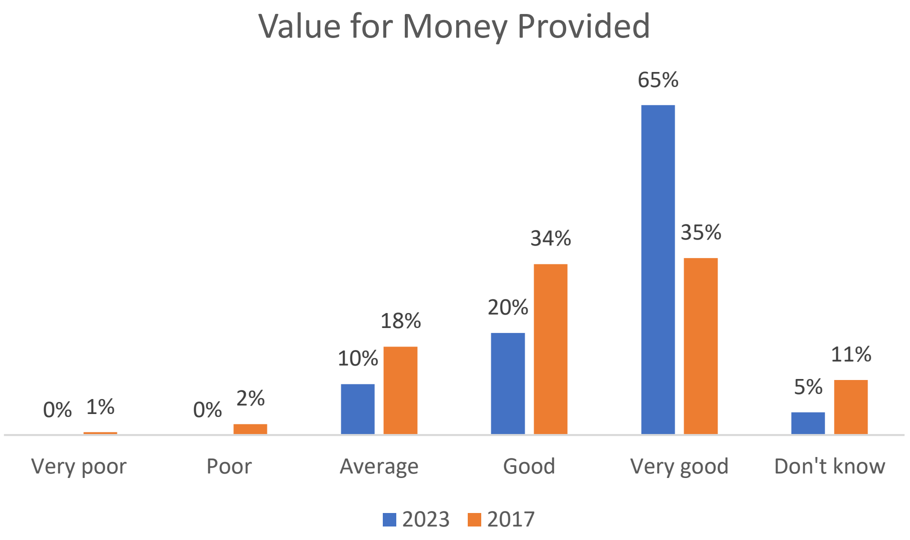
Overnight trip - Accommodation ratings

Most overnight visitors staying in paid accommodation (90%) rated the level of service received as ‘very good’ (65%) or ‘good’ (25%). This is significantly higher than the levels achieved in 2017, when 72% rated the service received as ‘good’ (34%) or ‘very good’ (38%), and it reinforces the need for quality provisions and quality service as these leave a lasting impact on people’s overall experience, increasing the opportunities for them to return and to recommend.

Almost two thirds (65%) thought the accommodation used offered ‘very good’ value for money and a further 20% thought it was ‘good’. Again, the 2017 results show lower scores, with 69% saying value for money was ‘good’ (34%) or ‘very good’ (35%).

This positive change with regards to both the quality of service received and the value for money of the accommodation provision is so important, especially in the current economic climate, and needs to be further sustained and communicated to visitors.



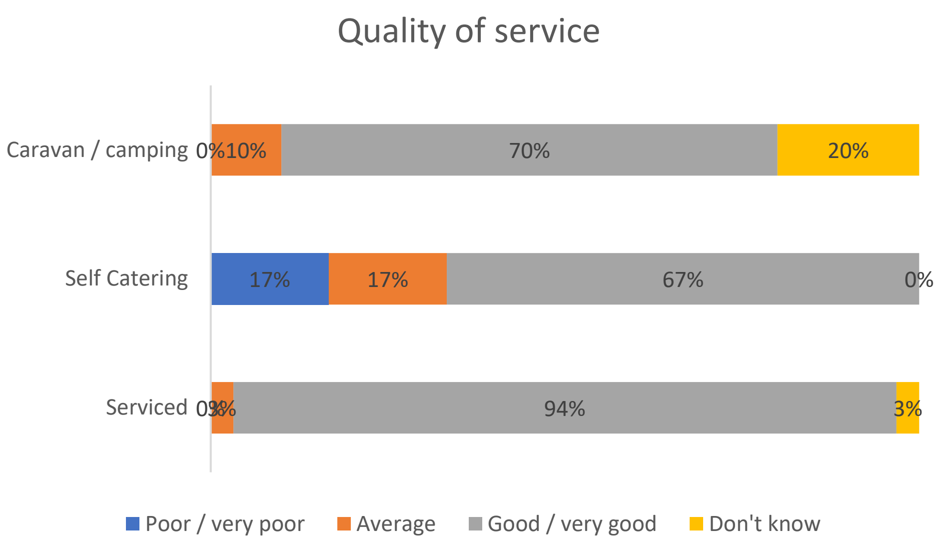


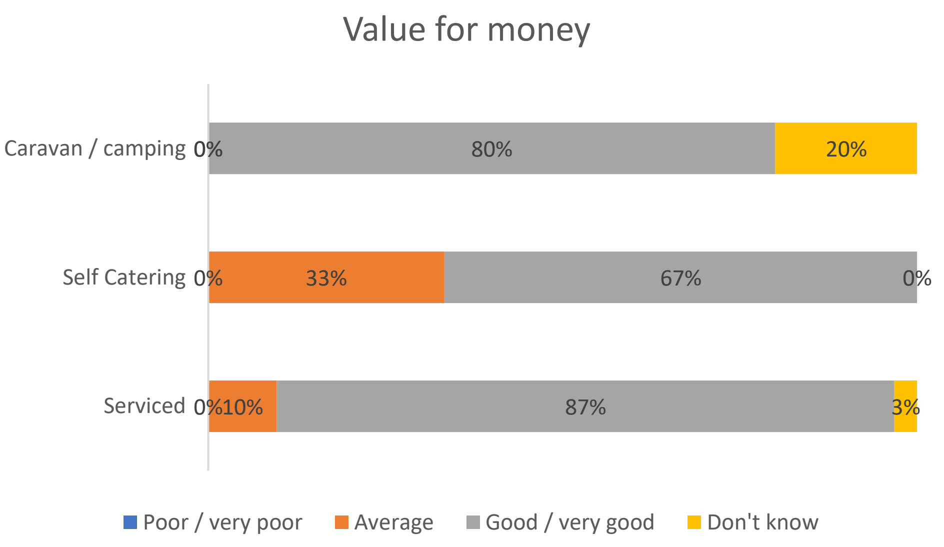
Trip Characteristics

Overnight trip - Accommodation ratings

The majority (94%) of visitors staying in serviced establishments rated the quality of service received as being ‘good’ or ‘very good’. Two thirds of those staying in self-catering accommodation (67%) rated the quality of service received as being ‘good’ or ‘very good’. Similarly, 70% of 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, 87% of overnight visitors staying serviced accommodation rated the value for money as being ‘good’ or ‘very good’. For caravan and camping sites, the score was 80%. Two thirds (67%) of those staying in self-catering accommodation rated the value for money as being ‘good’ or ‘very good’, with 33% rating it as ‘average’.





Trip Characteristics

Overnight trip - Accommodation booking

Visitors to Dover were most likely to book directly with the accommodation provider, with two in five (42%) using this method. A quarter of overnight visitors used travel fare aggregator websites such as Booking.com. Overall, there were minimal differences between the 2023 and 2017 results in terms of booking patterns. Other means used for booking accommodation included primarily AirBnB, also Pitch Up and Priceline were also mentioned.

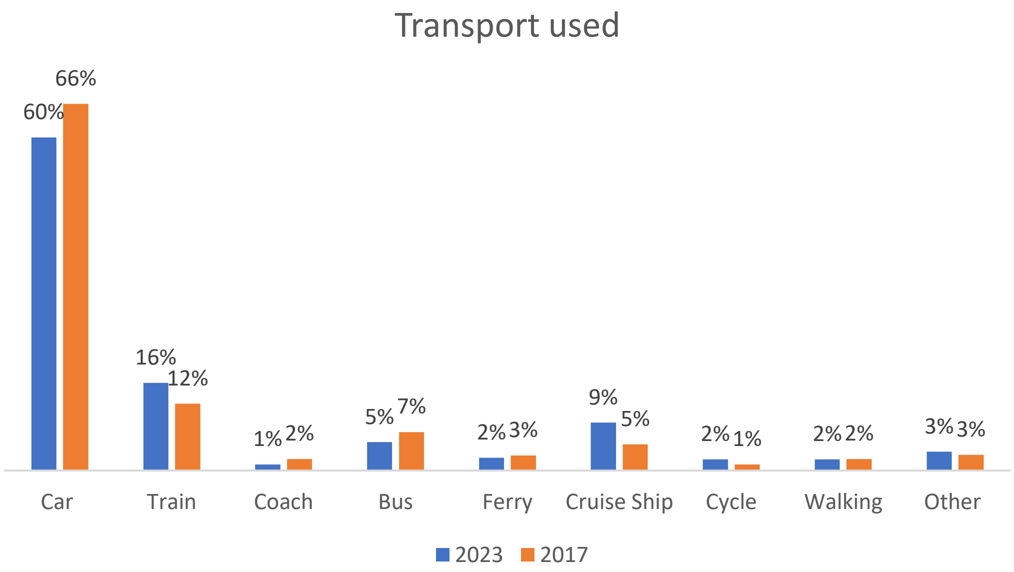
Booking accommodation	2023	2017
Direct with accommodation provider	42%	40%
Booking.com	26%	26%
TripAdvisor	3%	5%
Expedia	2%	1%
Trivago	0%	0%
Other	7%	20%
None	20%	9%

Trip Characteristics

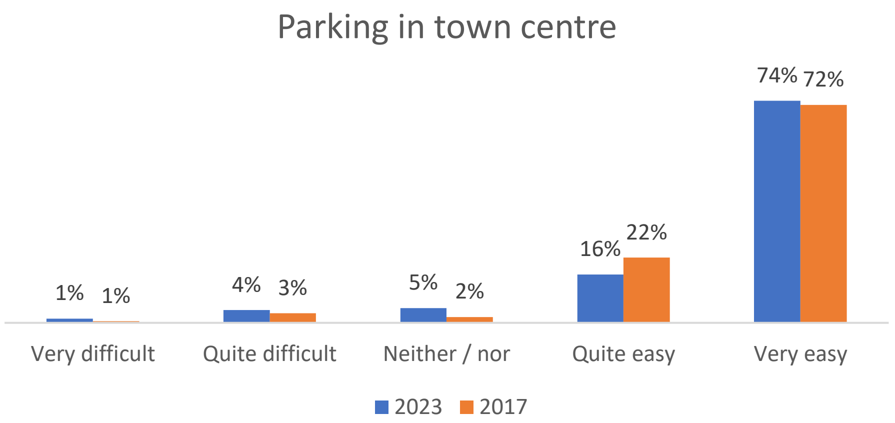
Mode of transport used

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 Dover, chosen by 60% of respondents (down from 66% in 2017). Just over two thirds of car drivers (69%) used the town's car parks, a 6% higher proportion, compared to 2017. Of these, the vast majority (90%) found parking in the town centre 'very easy' (74%) or 'easy' (16%), down from 94% in 2017.

Some arrived by public transport (16% train and 5% bus). Cruise ships and ferries accounted for 9% and 2% respectively.



Paid to use town centre car park	2023	2017
Yes, in a car park	30%	52%
Yes, using pay and display	39%	11%
No	31%	38%



Trip Characteristics

Activities undertaken whilst visiting

Walking and rambling were the most popular activities undertaken by visitors to Dover, enjoyed by 47% of visitors overall. A further 35% visited the coastline/beaches as part of their trip. Almost three in ten (29%) visited an attraction, and 17% attended and event. The most popular attractions and events are listed in the boxes below. This shows the growing importance events and festivals have as a means of attracting visitation and giving people a reason to visit at specific times.

Over a quarter of respondents mentioned 'other' activities. Of these, 15% went out to eat and drink, 7% went shopping, 3% visited the local parks and gardens and 1% visited the marina.

Activities undertaken	Percentage
Walking/Rambling	47%
Visited the coastline/beaches	35%
Visited attractions	29%
Attended an event	17%
Visited arts/culture	7%
Visited history/heritage	5%
Outdoor activities, watersports (rowing, swimming)	4%
Took part in organised experience	2%
Cycling	1%
Bird Watching	0%
Sea Fishing	0%
Fishing (Pier / lakes / riverside)	0%
Sailing	0%
On a Golf trip	0%
Other	26%

Dover Castle
White Cliffs
Dover Museum
Cinema
Funfairs

Western Heights
Regatta
Cider Festival
Dover Multicultural Festival

Eating and drinking (15%)
Shopping (7%)
Parks and gardens (3%)
Visiting Marina (1%)

Trip Characteristics

Expenditure levels

The average overall expenditure among staying visitors to Dover (per person, per 24 hours) on accommodation, eating out, shopping, entertainment and travel and transport was £53.89 (£45.19 in 2017). Accommodation and transport accounted for the highest proportion of the expenditure. The average overnight visit lasted 3.98 nights (5.09 in 2017), meaning that the average expenditure per person and per overnight trip was £206.22 (£230.02 in 2017).

Day visitors from home spent an average of £28.10 per person and per day in the town (£16.47 in 2017), with eating out and transport accounting for the highest proportions of expenditure.

Survey Findings – About Dover

Best things about Dover…

Respondents were asked to state the **best** things about Dover. Their responses have been grouped into key themes. Most respondents mentioned the top attractions (Dover Castle, White Cliffs) as well as history, heritage and the local museums. The seafront and the sea views, the marina, shopping options and events and festivals are also perceived as key assets of the town. Smaller groups of respondents made comments in relation to the relaxing and friendly atmosphere.

Challenging aspects about Dover…

The **challenges** related to Dover according to visitors have also been grouped into key themes. The biggest concern related to the overall aspect of the town centre and the High Street in particular. Many said Dover looks run down and in need of investment and tidying up. A second theme emerging was the high number of empty shops and the limited variety of shops. Finally, the volume of traffic, the lack and cost of parking, and the availability of toilets made up the third theme.

Survey Findings – Destination Marketing

Destination Marketing

Information used

Almost a third (62%) 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, 12% visited websites / search engines other than destination websites. A further 7% asked friends for recommendations and the same proportion looked for recommendations on social media. This reliance on digital sources used to plan a trip highlights the importance of ensuring digital channels have inspiring content and imagery, and accurate information.

Once in Dover, the majority (90%) did not make use of any type of visitor information. Those who did, relied on travel guide websites, with 2% visiting the whitecliffscountry.org.uk website.

Information Used (Planning stage)	2023	2017
I did not use any information	62%	58%
I visited other websites / search engine	12%	9%
I asked friends for recommendations	7%	4%
I looked for recommendations on social media	7%	3%
I visited the destination website (whitecliffscountry.org.uk)	5%	3%
I visited review websites (Trip advisor etc.)	4%	5%
I looked through brochures / leaflets	2%	10%
Advertisement (Paper / Magazine/ TV / radio)	1%	6%
I followed an influencer	0%	0%
Other	8%	9%

Information during the visit	Percentage
None	90%
Travel guide website	4%
Other (please specify below)	3%
whitecliffscountry.org.uk website	2%
Apps	2%
Travel blogs	1%

Destination Marketing

Visitor Information Centre

Overall, 5% of visitors made use of the Visitor Information Centre. They were asked to rate the levels of satisfaction with the service received. The VIC scores particularly well on the quality of service and the information provided, with scores of 4.84 and 4.58 out of 5, respectively. The score for ease of finding the VIC was lower (3.58). Dover VIC scored higher than the average for the three VICs combined for quality service and information received but achieved a lower score in terms of ease of finding. Overall, the 2023 results are better than in 2017.

VIC Satisfaction scores			
	2023	Three towns 2023	2017
VIC Ease find	3.58	3.75	4.56
VIC Quality service	4.84	4.69	4.63
VIC Information received	4.58	4.56	4.72

Survey Findings – Visitor Satisfaction

Visitor Satisfaction

Most 'liked' aspects of Dover as a destination

All visitors were invited to rate a set list of aspects about their visit to Dover using a scale of 1 (very poor) to 5 (very good). Finding their way round the town (road signs) and History and heritage achieved the highest scores (4.58 out of 5), pedestrian signage (4.53) and the feeling of welcome (4.50). Compared to 2017, the score for feeling welcome has increased significantly, highlighting that the efforts done to improve this have not gone unnoticed.

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

Satisfaction scores			
	2023	Three towns 2023	2017
Road signs	4.58	4.54	0.00
History & Heritage	4.58	4.51	4.50
Pedestrian signage	4.53	4.52	n/a
Feeling welcome	4.50	4.61	2.71
Maps and information boards	4.32	4.21	4.00
General atmosphere	4.29	4.38	4.50
Beaches/coastline (cleanliness)	4.24	3.59	n/a
Places to Eat and Drink	4.11	4.18	3.62
Attractions	4.07	3.85	3.81
Outdoor recreation / watersports	4.05	4.12	n/a
Shops	2.79	3.14	0.00
Public toilets - availability	1.71	2.41	3.81
Public toilets - cleanliness	1.65	2.19	3.91

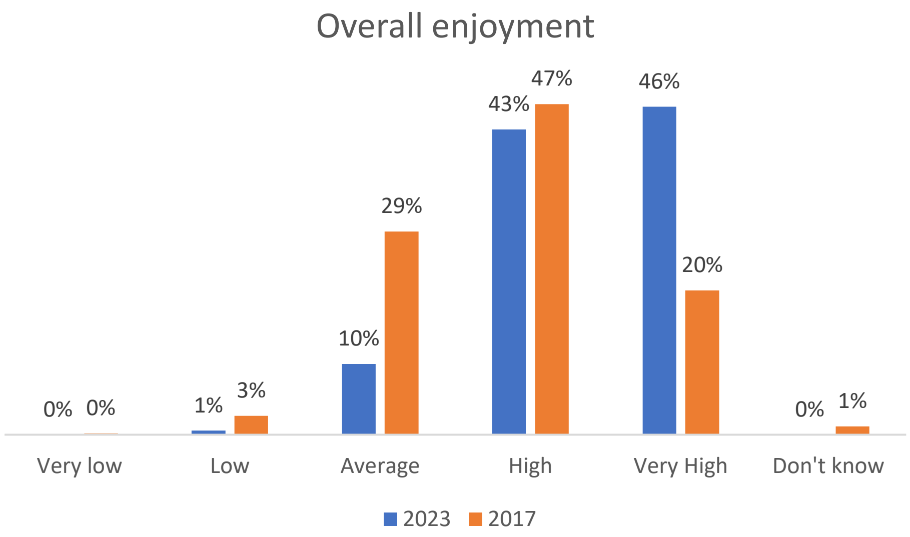
Visitor Satisfaction

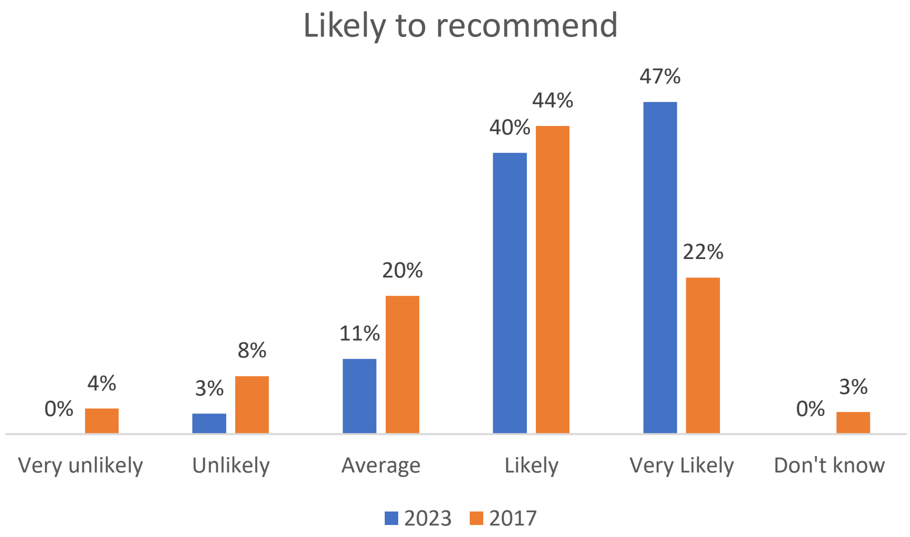
Overall Enjoyment

In terms of overall enjoyment of the visit, 46% of visitors to Dover rated their enjoyment as 'very high' and a further 43% rated it as 'high'. These results are above the ratings achieved in 2017.

Likelihood of recommendation

Overall, 47% of visitors to Dover felt that the likelihood of them recommending the town to somebody else was 'very likely' and a further 40% said it was 'likely'. Again, these results are higher to the ratings achieved in 2017.





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