



Sandwich Town Visitor Survey

December 2023



Contents:

Introduction	Page 3
Executive Summary	Page 4
Visitor Profile	Page 7
Trip Characteristics	Page 11
About Sandwich	Page 23
Destination Marketing	Page 26
Visitor Satisfaction	Page 29



Introduction:

This document presents the key findings of the Sandwich 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-Sandwich 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 Sandwich, 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 Sandwich only. The results for Dover and Deal are presented in separate reports.

Executive Summary:

Visitor Profile

- ◉ Visitors were spread across the age groups – 14% of all visitors were children under 16 and 62% were over the age of 45 years.
- ◉ Couples (44%) and family units (21%) accounted for two thirds of all visiting groups, followed by those who travelled with a group of friends and those travelling alone. The gender split was representative, with 49% male respondents and 51% female.
- ◉ The average group size was 2.66 people, comprising of 2.28 adults and 0.38 children.
- ◉ In terms of where were visitors to Sandwich from, 73% were from the South East, out of which 49% were Kent residents. 12% of all respondents lived in London.

Trip Characteristics

- ◉ Most respondents (96%) were visiting for leisure/holiday purposes, a significant increase compared to the 2017 results.
- ◉ A quarter (26%) were visiting Sandwich for the first time, with the repeat visitor market accounting for the majority of all visitors to Sandwich (74%).
- ◉ Two thirds of all visitors were 'day visitors from home' (64%). The majority of all day visitors stayed in Sandwich all day (66%) and a further 30% stayed for half a day.
- ◉ The overnight market accounted for 36% of all respondents. On average, overnight visitors who stayed in Sandwich (46%) spent 3.77 nights away from home.
- ◉ Those staying outside Sandwich were asked their reasons for not staying in the town. The most common response was simply that people were holidaying elsewhere (56%).

Accommodation

- ◉ Most overnight visitors stayed in caravan and camping sites (23%), followed by those who chose self-catering accommodation (22%).
- ◉ The majority of overnight visitors staying in paid accommodation (87%) rated the level of service received positively ('good' or 'very good'). Similarly, 87% thought their accommodation offered 'good' or 'very good' value for money.
- ◉ Overnight visitors to Sandwich 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 Sandwich, chosen by 76% of respondents.
- ◉ Less than half of car drivers (45%) used the town's car parks and most (91%) found parking in the town centre 'quite easy' or 'very easy'.

Expenditure

- ◉ The average overall expenditure among staying visitors to Sandwich (per person per 24 hours) on accommodation, eating out, shopping, entertainment and transport was £46.53.
- ◉ Day visitors from home who are visiting Sandwich spent an average of around £25.22 per person per day in the town.

Activities undertaken and associations

- ◉ Walking and rambling were the most popular activities undertaken by visitors to Sandwich, enjoyed by 56% of visitors overall. 34% engaged in other types of activities such as eating out and shopping, whilst 33% indicated attending an event.
- ◉ The **best** things about Sandwich according to visitors were the local history and heritage, the old streets and buildings, the riverside, as well as the cleanliness of the town and the relaxing and friendly atmosphere.
- ◉ The **challenges** when it comes to Sandwich are related to the shortage and cost of parking, as well as the limited availability of public toilets and accessibility, and the early closing times of shops.

Sources of information

- ◉ Almost three in five (59%) 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 smaller proportion preferring to look through brochures/leaflets or to ask their friends for recommendations.

Executive Summary:

Satisfaction

- ⦿ All visitors were invited to rate a set list of aspects about their visit to Sandwich using a scale of 1 (very poor) to 5 (very good). History and heritage (4.67), followed by the feeling of welcome (4.65), pedestrian signage (4.46) and road signage (4.45) 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, 38% of visitors to Sandwich rated their enjoyment as 'very high' and a further 53% rated it as 'high'.
- ⦿ Overall, 62% of visitors to Sandwich said it was 'very likely' that they would recommend the town to somebody else and a further 34% said it was 'likely'.

Survey Findings – Visitor Profile



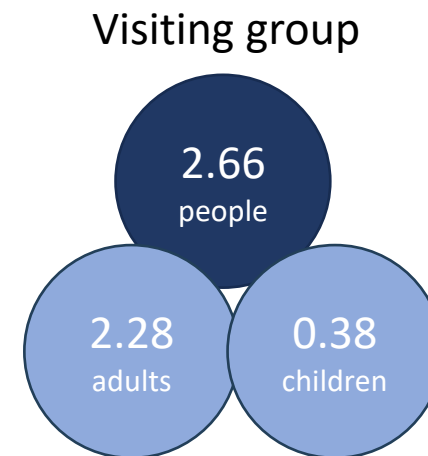
Visitor Profile – Group composition

Age groups

Visitors were spread across the age groups. Children under 16 accounted for 14% of visitors. Overall, 62% of all visitors were over the age of 45 years.

The average group size was 2.66 people, comprising of 2.28 adults and 0.38 children. The gender split was almost equal, with 49% male respondents and 51% female. The 2023 results include larger groups, with more children and less adults aged 45 and over, compared to the 2017 survey.

Couples (44%) and family units (21%) accounted for two thirds of all visiting groups. Groups of friends made up 12% of the sample, and those travelling alone accounted for a further 9%, highlighting a significant change compared to 2017, when those travelling alone were the second highest of the visiting party types.



Group composition	2023	2017
Alone	9%	26%
A couple	44%	40%
Family unit	21%	20%
Intergenerational family (with grandparents)	8%	2%
Extended family (with relatives and / or friends)	6%	6%
Groups of friends	12%	7%
Specialist / interest group	1%	0%
Other	0%	0%

Age group composition			
	Male	Female	Total
0-15	7%	7%	14%
16-24	2%	1%	3%
25-34	6%	5%	10%
35-44	4%	6%	10%
45-54	8%	7%	15%
55-64	8%	9%	17%
65+	14%	15%	30%
Total	49%	51%	100%

Age group composition 2017			
	Male	Female	Total
0-15	4%	5%	9%
16-24	2%	2%	4%
25-34	2%	5%	7%
35-44	4%	5%	9%
45-54	7%	9%	16%
55-64	9%	11%	20%
65+	16%	20%	36%
Total	44%	56%	100%

Visitor Profile – Employment

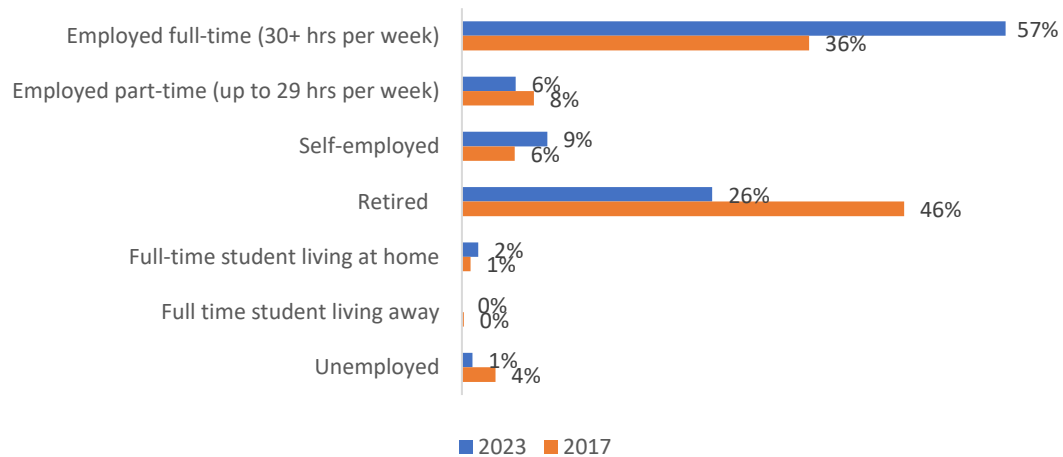
Employment status and occupation

As a consequence of the overall younger demographic of visitors interviewed, almost three in five (57%) 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.

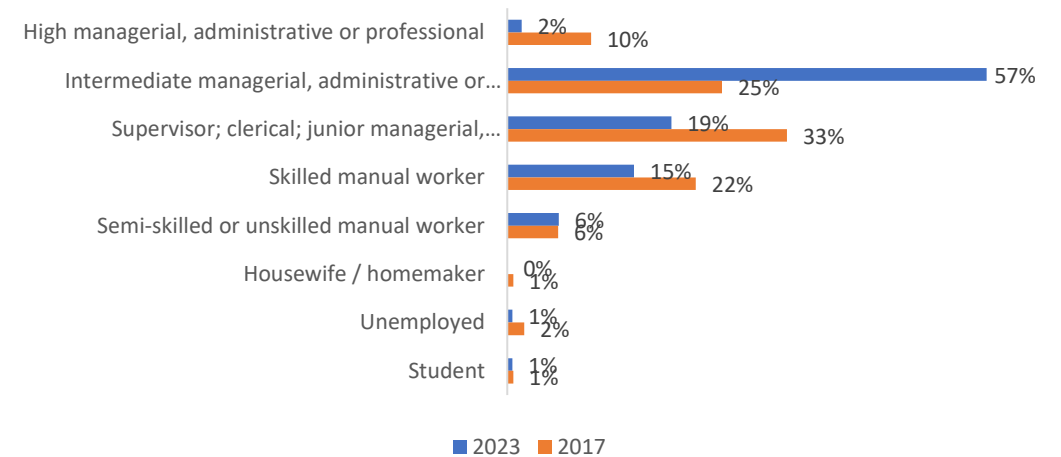
Occupation

The largest proportion of respondents (57%) were in middle managerial roles. Junior managerial roles (19%) and Skilled manual workers (15%) followed. This highlights a shift from the 2017 results.

Employment status



Occupation household's main income earner

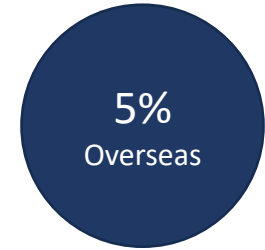


Visitor Profile – Origin of visitors

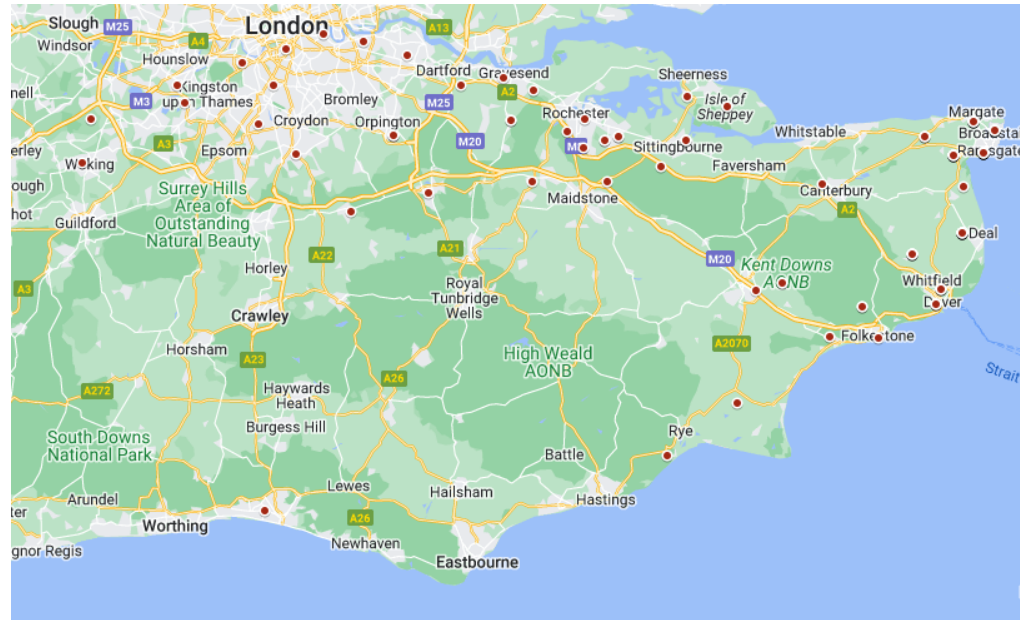
About three quarters (73%) of respondents were from the South East. This was followed by those who lived in London (12%), which shows an increase compared to the 2017 sample, and the East of England (7%).

There were large concentrations of respondents from Kent, which accounted for 66% of respondents, and in particular visitors from Ramsgate (18%), Dover (10%), and Canterbury (10%). See maps below and right.

A small proportion of respondents (5%) were residents from other countries, including Germany, France, Australia, and Canada.



Respondent distribution by home location		
	2023	2017
South East	73%	79%
London	12%	5%
East of England	7%	4%
Yorkshire and Humber	3%	1%
South West	3%	1%
East Midlands	2%	3%
Northern Ireland	1%	1%
West Midlands	0%	1%
North West	0%	3%
North East	0%	1%
Scotland	0%	1%
Wales	0%	0%
Sample	100%	100%



Survey Findings – Trip Characteristics



Trip Characteristics

Main purpose of visit

Most visitors were visiting for leisure or holiday purposes (96%). A minority of visitors (representing 1% of all visits) were visiting Sandwich to see friends or relatives. Other purposes (3%) related to attending events (car show, Folk Ale Festival, cycle event).

Purpose of visit	2023	2017
Leisure/Holiday	96%	79%
Shore visit from cruise ship	0%	-
(Non-regular) Shopping trip	0%	5%
Visiting friends/relatives	1%	7%
On a Golf trip	0%	-
Other	3%	9%

First time or repeat visitors?

A quarter (26%) were visiting Sandwich for the first time, a slightly higher proportion compared to 2017 (22%), with the repeat visitor market accounting for 74% of all visitors to Sandwich.

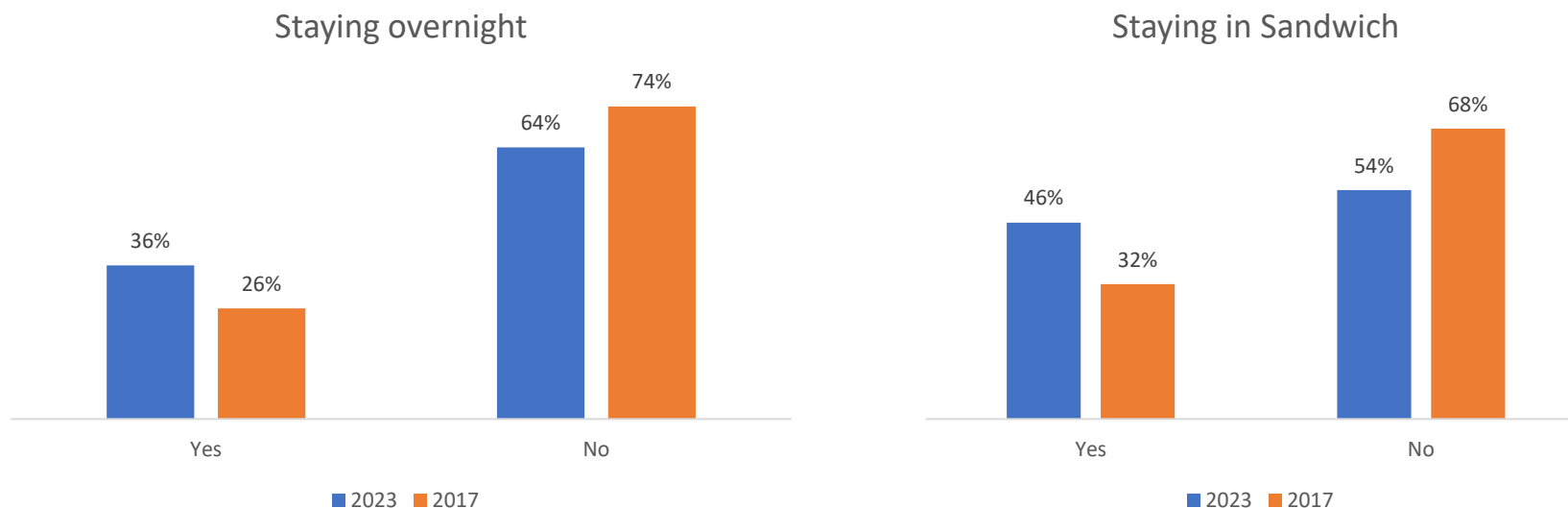
Have you visited the area before?	2023	2017
Yes	74%	78%
No	26%	22%

Trip Characteristics

Day trips or overnight stays?

About two thirds (64%) 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 36% were in Sandwich as part of an overnight stay. However, not all overnight visitors were staying in Sandwich. The results show that 46% of overnight visitors interviewed were staying in Sandwich and 54% were staying elsewhere.

Compared to 2017, we can see an increase in overnight stays generally, and encouragingly, an increase in those staying overnight in Sandwich.



Where else are they staying?

About half (52%) of overnight visitors who chose other destinations stayed within the Dover district. Others stayed in Canterbury, Folkestone & Hythe and Thanet.

Destination	Percentage
Deal	24%
Canterbury	18%
Walmer	9%
St Margaret's at Cliffe	6%
Worth	6%
Ramsgate	6%
Whitfield	3%
Lyminge	3%
Wingham	3%
Folkestone	3%
Westgate-on-Sea	3%
Great Mongeham	3%
Whitstable	3%
Rye, East Sussex	3%
Margate	3%
Hythe	3%
Rhodes Minnis	3%

Trip Characteristics

Reasons for not staying in Sandwich

Those staying outside Sandwich were asked their reasons for not staying in the town. The most common response was simply that people were holidaying elsewhere (56%). Two in five (38%) gave 'other' reasons, primarily related to staying with friends and relatives based elsewhere.

Reasons for not staying overnight	2023	2017
Holidaying elsewhere	56%	63%
No decent accommodation	0%	1%
It is not an appealing place to stay	0%	-
Lack of availability	3%	4%
Too expensive /cheaper elsewhere	3%	7%
Other	38%	24%

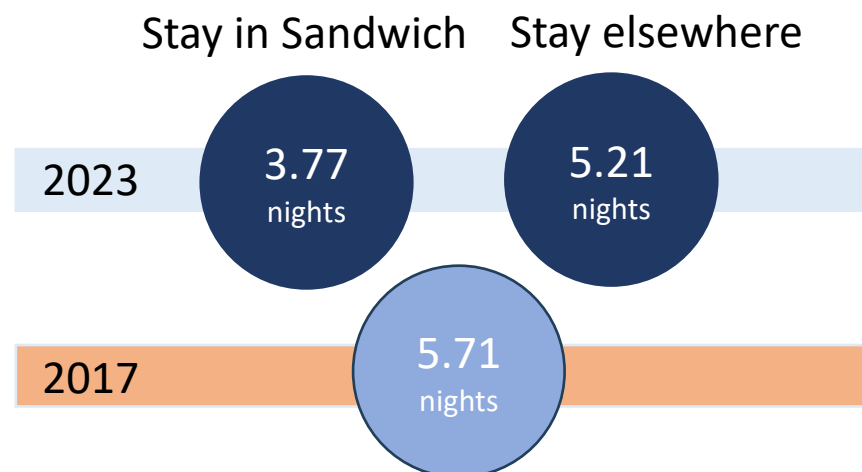
Day Trip duration

Two thirds of all day visitors (66%) stayed in Sandwich all day and a further 30% stayed for half a day. Only 4% of day trips lasted less than two hours. This highlights a significant shift from the 2017 results, with those indicating they stayed a full day more than doubling. This is a testament of visitor economy in Sandwich and of the changing visitor trends, so continuing to communicate the variety of activities and experiences available in the destination will be important in further increasing the length of stay and subsequently the visitor spend.

Day trip duration	2023	2017
Less than two hours	4%	15%
Half a day	30%	57%
All day	66%	28%

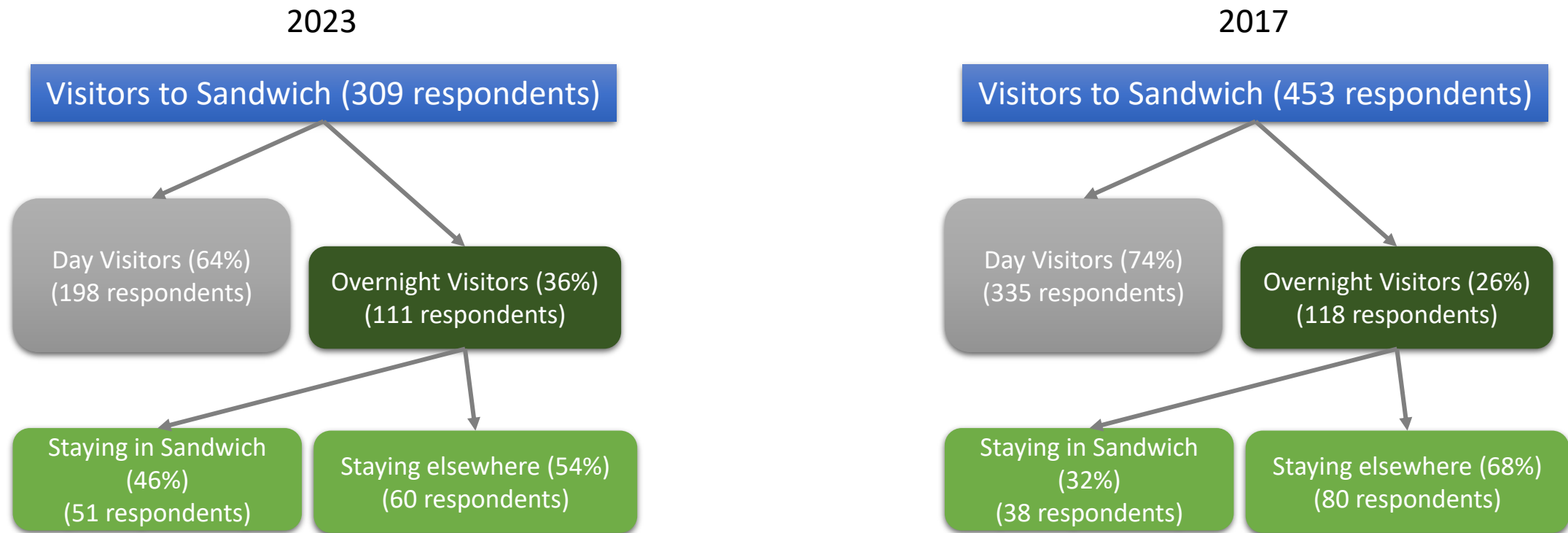
Overnight Trip duration

On average, overnight visitors staying in Sandwich spent 3.8 nights away from home. Those who stayed elsewhere spent 5.2 nights away. Whilst the trip duration is shorter compared to 2017, this is in line with regional and national trends that indicate a bigger appetite for shorter breaks.



Sample composition – 2023 and 2017 comparison

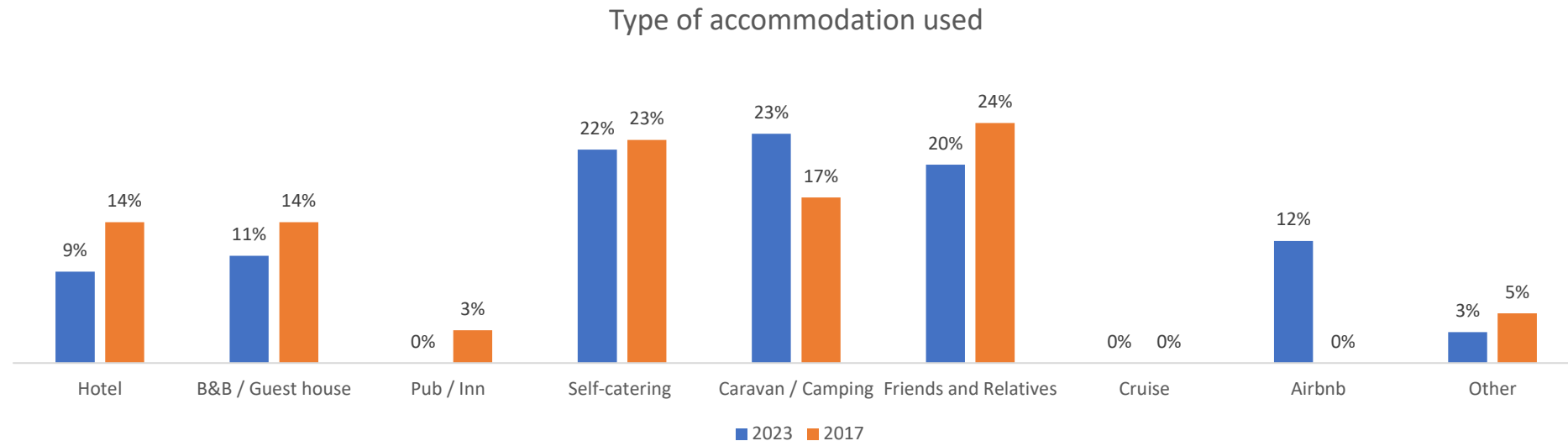
Just under two thirds (64%) of respondents to the 2023 survey were visiting for a day trip. The remaining 36% were staying overnight. However, as it was the case in 2017, not all overnight visitors were staying in Sandwich. The results show that 46% of overnight visitors interviewed were staying in Sandwich and 54% were staying elsewhere.



Trip Characteristics

Overnight trip - Accommodation used

The highest proportion of overnight visitors stayed in caravan and camping sites (23%), followed by those who chose self-catering (22%) or shared accommodation such as Airbnb (12%), with the latter showing the biggest growth since 2017. One in five (20%) stayed in homes of friends or relatives, down from 2017 when this accounted for 24% of all overnight stays.



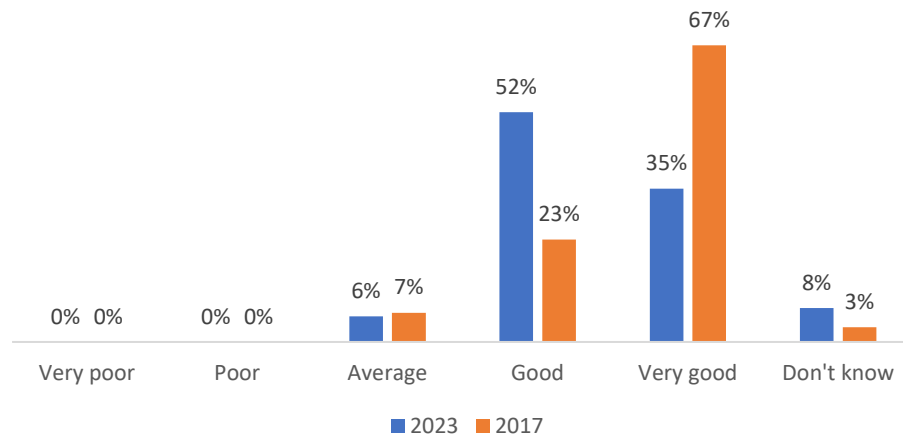
Trip Characteristics

Overnight trip - Accommodation used

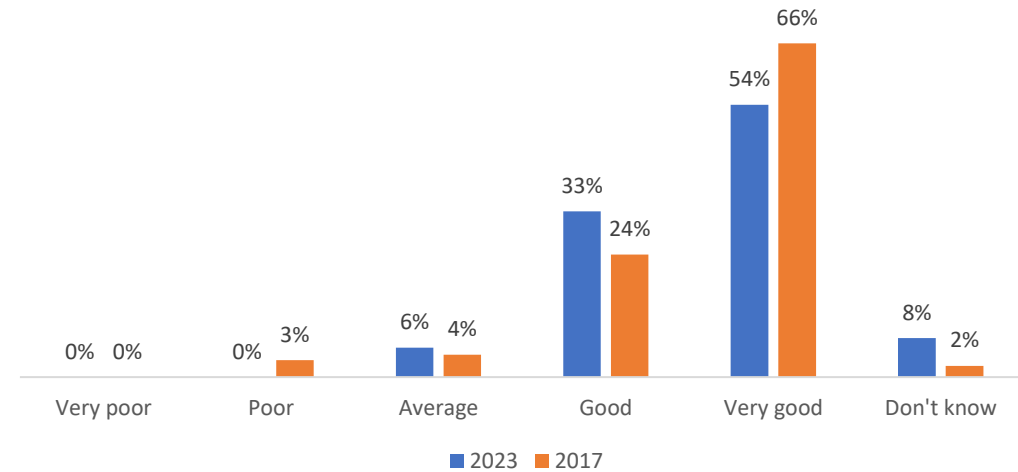
The majority overnight visitors staying in paid accommodation (87%) rated the level of service received as either 'good' (52%) or 'very good' (35%). Overall, this is lower than the levels achieved in 2017, when 90% rated the service received as 'good' (23%) or 'very good' (67%). This highlights the importance of further communicating with potential visitors and sharing information on quality overnight provisions, to inspire them and to further raise the quality of service received.

Just over half (54%) thought the accommodation used represented 'very good' value for money and a further 33% thought it was 'good'. Again, the 2017 results show slightly higher scores, with 90% saying value for money was 'good' (24%) or 'very good' (66%). Given the current economic climate this is not surprising, and the destination should continue to promote quality and value for money as means to raise awareness and to drive visitation.

Quality of Service Received



Value for Money Provided

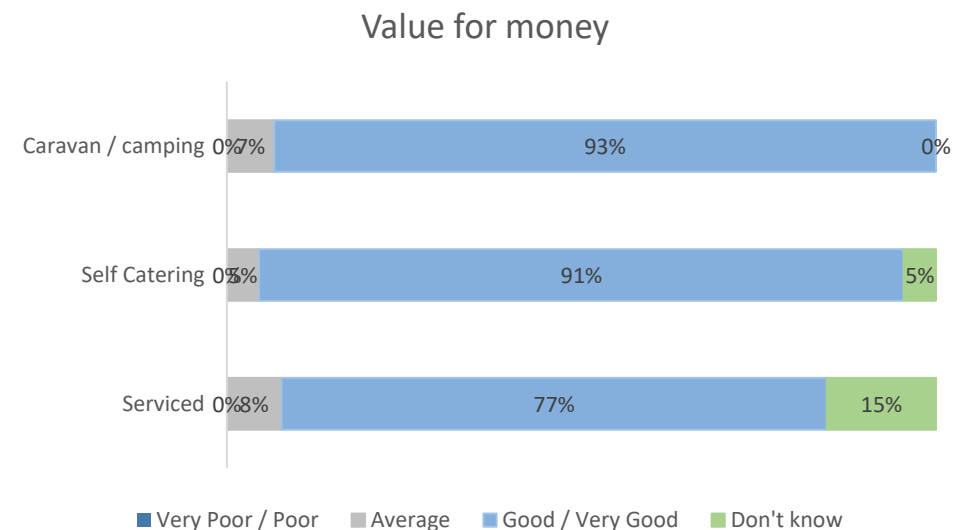
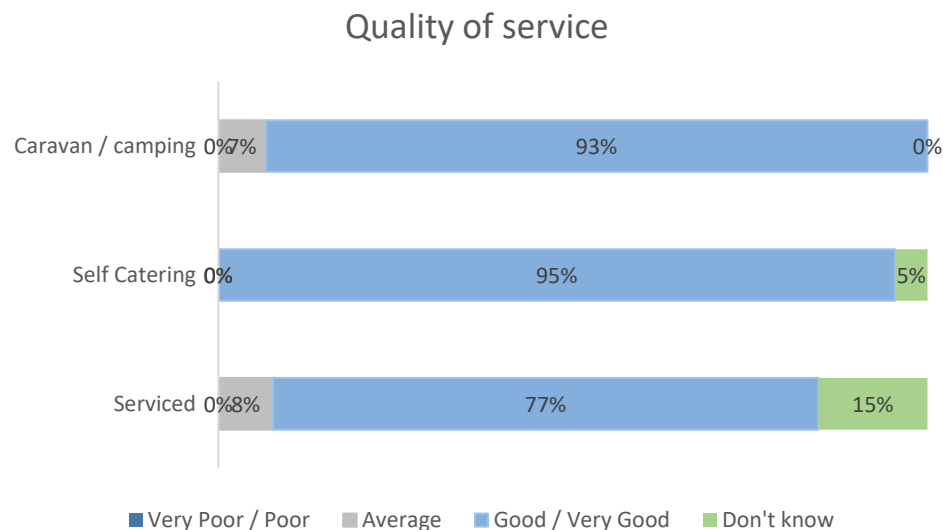


Trip Characteristics

Overnight trip - Accommodation ratings

Three quarters (77%) of visitors staying in serviced establishments rated the quality of service received as being 'good' or 'very good' and 8% rated it as average. The majority (95%) of those staying in self-catering accommodation rated the quality of service received as being 'good' or 'very good'. Similarly, 93% 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, 77% of overnight visitors staying serviced accommodation rated the value for money as being 'good' or 'very good', with 8% rating it as 'average' and 15% unable to say. For caravan and camping sites, the good/very good score was 93%, and 91% of those staying in self-catering accommodation rated the value for money as being 'good' or 'very good'.



Trip Characteristics

Overnight trip - Accommodation booking

Looking at booking patterns, the results follow a similar pattern to those recorded in 2017. Visitors to Sandwich were most likely to book directly with the accommodation provider, with over half of respondents (54%) using this method. A quarter of overnight visitors used ‘other’ methods (primarily AirBnB and online travel agents such as Hoseasons, cottages.com, etc.), and 12% 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.

Booking accommodation	2023	2017
Direct with accommodation provider	54%	53%
Other	27%	25%
Booking.com	12%	9%
None	6%	6%
Expedia	2%	1%
TripAdvisor	0%	6%
Trivago	0%	0%

Trip Characteristics

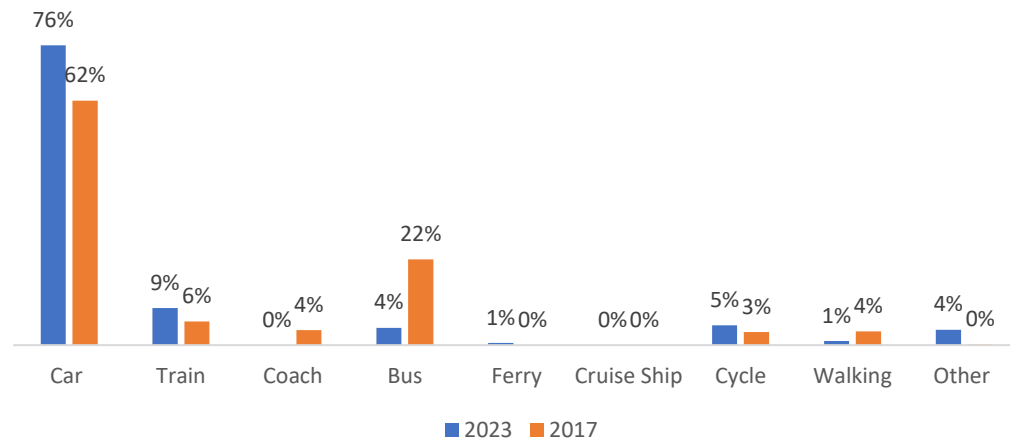
Mode of transport used

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 Sandwich, chosen by 76% of respondents (up from 62% in 2017). Just under half of car drivers (45%) used the town’s car parks. Of these, the vast majority (91%) found parking in the town centre ‘very easy’ (71%) or ‘quite easy’ (20%), slightly down from 93% in 2017.

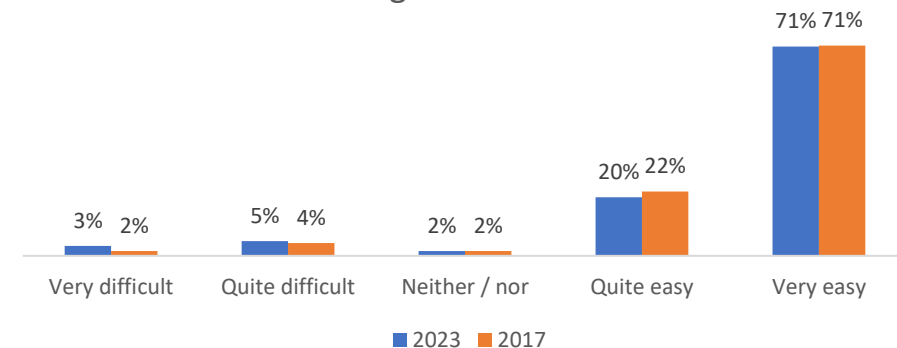
Some arrived by public transport (9% train and 4% bus), a reduction since 2017, when public transport (train, coach and bus) accounted for 32% of the sample. Whilst this might also be due to the type of trip people are on (i.e. holidaying elsewhere, but visiting for a day), or where visitors come from, efforts should be made to promote and encourage the use of public transport, as this will contribute to the environment and to reducing traffic and any potential friction with residents.

Paid to use town centre car park	2023	2017
Yes, in a car park	5%	52%
Yes, using pay and display	40%	10%
No	55%	38%

Transport used



Parking in town centre



Trip Characteristics

Activities undertaken whilst visiting

Walking and rambling were the most popular activities undertaken by visitors to Sandwich, enjoyed by 56% of visitors overall. Over a third of respondents mentioned ‘other’ activities, mainly shopping and going out for meals. A further third of the sample mentioned local events, exhibitions and festivals, followed by visiting history/heritage (12%) and 3% visited attractions. Significant changes compared to 2017 relate to a decrease in walking/rambling, but a strong leap for events, which we also know are generally a strong destination influencer.

Activities undertaken	Percentage	
Walking/Rambling	56%	
Attended an event	33%	→ '40s / '50s Festival Ale Festival Car Show Medieval Festival
Visited history/heritage	12%	
Cycling	3%	
Visited attractions	3%	→ Museum
Visited arts/culture	2%	
Bird Watching	0%	
Fishing (Pier / lakes / riverside)	0%	
Sailing	0%	
Sea Fishing	0%	
Outdoor activities, watersports	0%	
On a Golf trip	0%	
Visited the coastline/beaches	0%	
Took part in organised experience	0%	
Other	34%	→ Went shopping Eating and drinking (lunch out)

Trip Characteristics

Expenditure levels

The average overall expenditure among staying visitors to Sandwich (per person, per 24 hours) on accommodation, eating out, shopping, entertainment and travel and transport was £46.53 (£48.78 in 2017). Accommodation and food and drink accounted for the highest proportion of the expenditure. The average overnight visit lasted 4.60 nights (5.71 in 2017), meaning that the average expenditure per person and per overnight trip was £214.04 (£278.53 in 2017).

Day visitors from home spent an average of £25.22 per person and per day in the town (£16.71 in 2017), with eating out and shopping accounting for the highest proportions of expenditure.



Survey Findings – About Sandwich



Challenging aspects about Sandwich...

The **challenges** related to Sandwich according to visitors have also been grouped into key themes. The biggest concern related to the shortage and the cost of parking. A second theme emerging was linked to facilities, such as the lack of public toilets and accessibility, with some mentioning poor signage to find their way round. Finally, the range of shops, but also the early closing times of some shops made up the third theme.



Survey Findings – Destination Marketing



Destination Marketing

Information used

Almost three in five (59%) of all visitors had not searched for destination information pre-trip – rather they relied on their previous knowledge. This is a significant decrease compared to 2017 results, maybe also indicative of a larger proportion of first-time visitors. Of those who did search for tourism information, 8% visited websites / search engines other than destination websites and a further 8% looked for recommendations on social media. Brochures and leaflets were used by 6% of the sample and a further 4% asked friends for recommendations. Almost one in five (19%) use ‘other’ sources of information. These include event websites (Ale festival, Le Weekend), specialist sites (Classic cars), and destination and attractions sites (Explore Kent, Visit Kent, English Heritage).

Once in Sandwich, the majority (92%) did not make use of any type of visitor information. Those who did, relied on social media (3%) and printed guides (3%).

Information Used (Planning stage)	2023	2017
I did not use any information	59%	80%
I looked for recommendations on social media	8%	1%
I visited other websites / search engine	8%	2%
I looked through brochures / leaflets	6%	4%
I asked friends for recommendations	4%	3%
I visited review websites (Trip advisor etc.)	2%	2%
Advertisement (Paper / Magazine/ TV / radio)	1%	0%
I visited the destination website (whitecliffscountry.org.uk)	1%	0%
I followed an influencer	0%	0%
Other	19%	5%

Information during the visit	Percentage
None	92%
Other social media	3%
Printed guides	3%
Other	2%

Destination Marketing

Visitor Information Centre

Overall, 1% of visitors made use of the Visitor Information Centre so the following results should be considered as indicative only. They were asked to rate the levels of satisfaction with the service received. The VIC scored well on the ease of finding the VIC and the quality of service, both achieving a score of 4 out of 5 respectively. However, these scores are below those achieved in 2017. The score for information provided was higher (5.00) and also better than in 2017.

VIC Satisfaction scores			
	2023	Three towns 2023	2017
VIC Ease find	4.00	3.75	4.90
VIC Quality service	4.00	4.69	4.86
VIC Information received	5.00	4.56	4.90

Survey Findings – Visitor Satisfaction



Visitor Satisfaction

Most 'liked' aspects of Sandwich as a destination

All visitors were invited to rate a set list of aspects about their visit to Sandwich using a scale of 1 (very poor) to 5 (very good). History and heritage achieved the highest score (4.67 out of 5), followed by the feeling of welcome (4.65), pedestrian signage (4.46) and road signage (4.45). These scores are marginally below the ones achieved in 2017, however the history and the welcome in Sandwich fared better than the average for the three towns (Dover, Deal and Sandwich).

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.

Satisfaction scores	2023	Three towns 2023	2017
History & Heritage	4.67	4.51	4.75
Feeling welcome	4.65	4.61	4.74
Pedestrian signage	4.46	4.52	4.69
Road signs	4.45	4.54	n/a
General atmosphere	4.35	4.38	4.69
Maps and information boards	4.18	4.21	4.65
Places to Eat and Drink	4.17	4.18	4.72
Outdoor recreation / watersports	4.01	4.12	n/a
Attractions	3.73	3.85	4.55
Shops	3.39	3.14	4.35
Public toilets - availability	2.94	2.41	4.28
Public toilets - cleanliness	2.54	2.19	4.29

Visitor Satisfaction

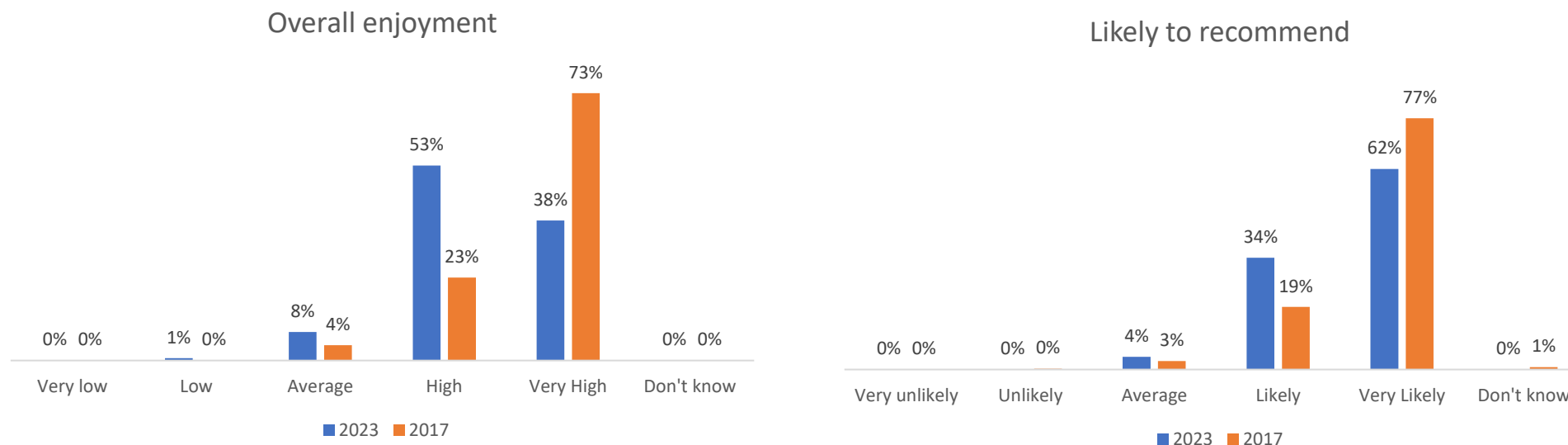
Overall Enjoyment

In terms of overall enjoyment of the visit, 38% of visitors to Sandwich rated their enjoyment as ‘very high’ and a further 53% rated it as ‘high’. These results are below the ratings achieved in 2017, when 73% rated their enjoyment as ‘very high’.

Likelihood of recommendation

Overall, 62% of visitors to Sandwich felt that the likelihood of them recommending the town to somebody else was ‘very likely’ and a further 34% said it was ‘likely’. These results are overall on par with the ratings achieved in 2017.

Focus should be placed on solving challenges and perceived challenges, as well as on communicating these changes to visitors, to ensure their perceptions around the quality of the trip and likelihood to recommend the destination improve. This will also increase the rate of repeat visitation.



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