DOVER BIG LOCAL

Tourism Research Project

Tourism Works - June 2016

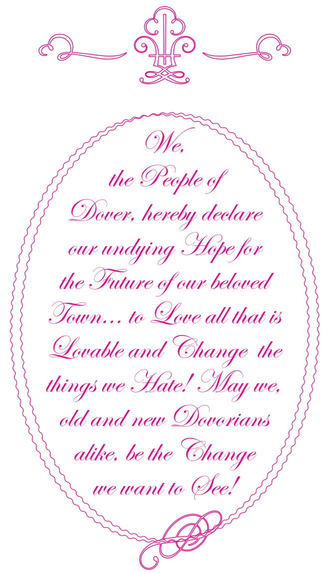
LOTTERY FUNDED

BIG LOTTERY FUND

Creating change
in the heart of Dover

Contents

Appendices



*By Edda Venusia Jones.
First shown as part of
"Spinning a Yarn",
an elaboration on a hoardings
commission by Dover Pride in 2009*

NB There are two further documents available to be used in conjunction with this report

a Dover Big Local Audit of Tourism businesses
b Dover Big Local workshop report

DOVER BIG LOCAL

Creating change
in the heart of Dover

1 Summary and Recommendations

Where are we now?

Dover is a unique destination in tourism terms. Its position as the closest point in the UK to Europe, its transport connections to London and its proximity to other re-emerging coastal towns in East Kent place it in a position of which many other destinations are enviable.

With four million visitors creating 3,700 jobs (full-time equivalents), Dover District as a whole is the third highest performing district in Kent (excluding Medway).

A further layer of opportunity presents itself; Dover is home to two of the best known and iconic attractions in Europe, if not the world - Dover Castle and the White Cliffs of Dover, together attracting over 600,000 annual visitors, many of whom visit these destinations without going into the town. The elusive opportunity for Dover are the five million ferry passengers, who pass within 100 metres of the town centre, and the 200,000 cruise passengers either leaving and returning on a cruise, or arriving as a port of call destination. The vast majority, however, does not stop in the town or experience any of its attractions.

Yet another layer of this multi-faceted destination is the town's amazing, unrivalled military history. The Dover Heritage Strategy (a groundbreaking supplementary planning document) lists numerous internationally significant heritage sites and scheduled monuments in and around the town, offering the opportunity to tell Dover's (and Britain's) story; sites, which are not regularly accessible and are available to add to the visitor offer.

The challenges of Dover start with its topography, a valley town with the castle and cliffs above it. The lack of both national brand shops and quality small businesses in the main town centre, and the current limited food, drink and accommodation offer, set against a confusing one-way system, visually cutting off the beautiful promenade and seafront, create challenges for both visitors and residents.

While both Dover District Council and Dover Town Council invest in tourism and recognise its importance, there is no one body taking responsibility directly for Dover town tourism. Moreover, budgets are dwindling and the councils are constantly fighting to maintain resources for tourism against the backdrop of severe budget cuts from central government. The many private and voluntary sector tourism businesses promote their services and attractions in varying degrees to potential visitors, and it is important to them that Dover has a positive image over its competitors but, ultimately, their objective is to preserve heritage, or sell tickets etc, to sustain their core objectives. The public and private sectors are, of course, inextricably linked in the promotion of tourism, but it is likely that small business owners will not have the expertise or resources to promote Dover competitively to a national/international audience. Collectively there is little cohesion, and no one organisation, whose priority it is to promote the tourism assets of Dover; there is no dedicated, central point of management and organisation for tourism in the town.

There is, however, a wealth of support from volunteers in the sector and now a welcome intervention from Dover Big Local to revive the discussions between the private, public and volunteer sectors to mastermind positive change and partnership working.

1 Summary and Recommendations

Destination Dover: an opportunity

This is an extraordinary opportunity to change the status quo for Dover town. Set against rising competition in the domestic market from destinations all over Britain, and opportunities to increase the near Europe market at a time of growing reticence towards air travel due to potential security threats, the time is right for establishing Destination Dover. A challenge, yes; but also an unrivalled opportunity, if residents, businesses and the public sector pull together now to make a change, a rallying call for Dover, to encourage everyone to tell their friends, relatives and visitors what they are missing, what they don't know about Dover and how its future is shaping up.

That future includes:

- The recent demolition of Burlington House, facilitated by Dover District Council, making way for the new St James retail and leisure park and hotel, due to open in early 2018
- Changes to the management of the museum, including discussions about introducing free entry, facilitated by a partnership between Dover District and Dover Town Councils
- The enormous changes to the Western Docks and harbour, creating a new future for the seafront and its businesses, by the Port of Dover
- A coordinated and supported Coastal Communities funding programme
- Plans for opening up the Western Heights to improved visitor access, with a possible new hotel development
- Land Trust investing in Fort Burgoyne
- Bold plans aimed at revolutionising the movement of visitors between the castle and the town centre include various options such as a cable car, scenic lift etc.
- Proposals for the new Commonwealth War Memorial
- The substantial investment into the Maritime Skills Academy, potentially attracting trainees from all over the world
- The opportunity of the Open Golf Championship in 2020
- Emerging plans to create more amenity value from the River Dour and the establishment of the Bluebird Heritage Trail
- The plans articulated in the Heritage Strategy, the Cultural Framework and the Local Plan, which will serve to support future development and funding applications
- The establishment of a new East Kent Mining Museum at Betteshanger Sustainable Park

The first stage of the journey is to gain financial commitment from the key partners in Dover to employ a Destination Manager working with a board of partners, who are committed to the principles of a Destination Management Plan (DMP) approach and committed to supporting Destination Dover over an initial five-year period.

We realise that a five-year commitment is a difficult thing to ask, but we have an opportunity to do things differently and tackle those issues that have brought failure to many tourism initiatives in the past. Short-term annual budgeting commitments result in tourism managers constantly battling to gain funds to pay salaries, reducing the time spent delivering. Through Dover Big Local's community-led approach, we have a chance to create a sustainable, growing and successful destination management model, with a solid bedrock from which to operate effectively.

1 Summary and Recommendations

Recommendations

1 Create an annual fund (ideally £100,000 per annum) to employ a Destination Manager, provide backroom facilities and a budget for projects, and provide match funding for grant applications

2 DBL to continue its involvement in the project and the process in order to bring and maintain an independent overview and provide an interim solution to budget management and employment of the Destination Manager

3 Create an interim board structure to oversee the recruitment process

4 Agree and set up an appropriate governance system, with partners

5 Agree the priorities for the first three months, the first year and subsequent years up to year five, with partners

6 Agree which priority projects go forward for funding applications, with partners

7 Seek to develop a team to support the Destination Manager, made up of secondees from the partners and volunteers

2 Destination Dover - The Destination Management Planning Journey

Extracts from Visit England's Principles for developing destination management plans

"A Destination Management Plan (DMP) is a shared statement of intent to manage a destination over a stated period of time, articulating the roles of the different stakeholders and identifying clear actions that they will take and the apportionment of resources. In these definitions, 'manage' and 'management' are taken in their widest sense. Crucially, destination management includes the planning, development and promotion of a destination, as well as how it is managed physically, financially, operationally and in other ways."

Visit England has produced detailed guidance on how to develop a Destination Management Plan (DMP) in order to help manage, develop and promote an area to visitors in a coordinated way, which encourages the engagement of both the public and private sectors. The DMP model and this guidance has been followed and interpreted by many destinations across Britain. Visit Britain produces many advice and support documents for destinations to use, enabling towns, cities and areas to develop their own DMPs.

The work carried out for Dover Big Local by Tourism Works has embraced the DMP principles and started the process of developing the DMP through consultations, workshops and the gathering of research to articulate the priorities for Dover's tourism industry, and establish a route to achieving these collective aims.

Following the establishment of an interim Destination Dover board and the employment of a Destination Manager, the team will be able to take the next steps in the development of a form of DMP by agreeing the priorities and actions over the next five-year period. The result will be an agreed plan that can be shared across the industry and used as a basis for funding applications.

In summary, a DMP:

- Establishes a common purpose, and collaborating to achieve it is the key to "offering compelling destinations of distinction".
- Ensures that all the components that make a successful destination should be managed in an integrated and long-term way, with a clear focus on the needs of residents, businesses and visitors.
- Is a shared statement of intent to manage tourism over a 5-year period
- Articulates the roles of the partners and identifies clear actions that each will take, including the apportionment of resources
- Is not about including everything, but about prioritising actions, identifying quick wins and longer term actions, putting some actions on the back burner until resources are available, and leaving some things out of the plan to re-evaluate at a future date

2 Destination Dover - The Destination Management Planning Journey

Developing a Destination Management Plan

The five key DMP steps

1. Agree to plan together
2. Gather the evidence
3. Set the direction
4. Identify the action
5. Measure progress

Factors for consideration

- Partnership structure and communication
- Product quality and investment
- Branding and identity
- Tactical marketing
- Infrastructure investment
- Research and intelligence
- Skills and training

The who and the how

- Who can do it
- How can we measure it
- Resources required
- Funding sources

The work commissioned by Dover Big Local and this report represent the first stages of the development of a DMP approach for Destination Dover and the partners. It is still work in progress and will evolve and develop over time.

3 Destination Manager - Outline Job Description

Destination Manager:
Job description

Job Title:	Destination Manager for Dover
Reporting to:	Destination Dover Board
Hours of work:	37 plus some evenings and weekends as required
Salary:	c £35-40,000 per year depending on experience, 3-5 year fixed term contract
Start date:	October - December 2016

SUMMARY OF POSITION

To provide leadership for Destination Dover tourism; to plan, manage and deliver a marketing programme in partnership with individuals and businesses in Dover's tourism sector, as well as public sector organisations, such as the town and district councils, Dover Big Local, the Port of Dover, English Heritage and the National Trust. The manager will facilitate an active relationship with attractions, accommodation providers, transport operators, retailers and restaurants in Dover

BACKGROUND

In 2014, a community group, Dover Big Local, was awarded £1 million Lottery funding over 10 years to help residents make Dover a great place to live, work and play. Through community consultation, tourism was identified as a key economic driver, but one that needed urgent help. The town's heritage sites, iconic landscape, the port and the surrounding area gives Dover great tourism potential, the full extent of which has yet to be realised.

A five-month tourism project has just been completed. It has brought together market research and the local industry's ambitions through consultation, to kick start a tourism plan for the area. It has recognised that Dover tourism needs to be coordinated and managed, and the industry has therefore created the post of destination manager.

The idea is to develop a more professional approach that provides both local people and visitors with high quality opportunities to experience the best of Dover - its history and its environment - while tying it into the broader context of the Dover District, East Kent and the Continent.

3 Destination Manager Job Description

PRINCIPAL DUTIES AND RESPONSIBILITIES

1. To develop a 5-year marketing strategy and development plan for Dover tourism, identifying existing and new markets, and creating a detailed action plan in consultation with the Destination Dover board using the national Destination Management Plan model (Visit England)
2. To deliver, review and monitor the plan, working in collaboration with Dover's tourism sector
3. To report to the Destination Dover Board monthly/bi-monthly
4. To build close and collaborative working relationships across the tourism sector, including public and private bodies
5. To ensure best practice in destination marketing, and advise and inspire Dover businesses to do the same
6. To manage and achieve budgetary targets
7. Research funding opportunities, plan and write funding applications
8. To grow the potential tourism market from the transit passengers arriving at the port
9. To develop high quality marketing collateral
10. To develop a digital strategy, including website and social media
11. To maintain and develop existing databases
12. Assess need for new market research, and undertake if necessary
13. To represent Dover at local, regional, national and international meetings and events

GENERAL

The person will be expected to be flexible in working arrangements, and will be required to work outside normal office hours, eg, to attend industry events. They will need to understand how to form collaborations and mobilise the sector.

PERSON SPECIFICATION

KNOWLEDGE AND EXPERIENCE

Essential

- Knowledge of the tourism industry and experience in a similar role
- A degree in a relevant subject
- Experience of developing and implementing destination marketing strategies
- Excellent organisational and analytic skills
- Knowledge of standard office software, including excel and PowerPoint
- Excellent writing skills
- Experience of bid writing
- Experience of partnership working between public and private sectors
- Solid project management skills

Desirable

- Knowledge of Dover and Kent, and the area's tourism offer
- Knowledge of other languages, especially French

PERSONAL

- Strong interpersonal skills and a confident communicator and presenter
- Ability to inspire and influence
- Ability to work under pressure, and work independently or as part of a team
- Creativity and enthusiasm
- Positive 'can do' attitude, even in the face of opposition

4 Governance Options

We have articulated three main options for future management of tourism in Dover. This excludes maintaining the status quo, which all stakeholders agree is no longer an acceptable option. It has already been agreed that a new destination manager is required to pull all the tourism activity together and gain more of a local, regional and national profile for Dover, and help further the tourism arguments for developing and supporting projects and campaigns.

Option 1 - New Company (Destination Dover)

This option would involve the creation of a newly dedicated enterprise, in the form of a not-for-profit company, to lead destination marketing and tourism development activity in Dover town. For this to be viable, the key stakeholders in Dover town would all need to be fully committed in terms of joint leadership, provision of core and in kind funding, and representation on the Board of Directors.

The potential stakeholders have been identified as:

- Dover Big Local
- Dover Town Council
- Dover District Council
- Port of Dover
- P&O Ferries
- DFDS
- De Bradelei Wharf
- St James Retail Centre
- Leaf Hotels
- English Heritage
- National Trust

The benefits of this model would be that the company would be totally focused on Dover town; it would focus on tourism and not be distracted by other issues or sectors; it would have separate legal status to enable applications for matched and project-based funding; and it would be a statement of intent of Dover's determination to improve its tourism performance and image.

This requires a significant level of commitment from the main stakeholders; the need to commit to (preferably) five-year cycles of funding and the need to recruit a new dedicated destination manager and supporting expertise.

There are four possible models in terms of the type of non-profit company, which could be set up to house the new service.

1.1 Model A - Unincorporated Association

A new Association could be set up for "Destination Dover" along the lines of the White Cliffs Country Tourism Association. This would not be a distinct legal entity, but it would be based on contracts between the main partners/ members, and members would make financial contributions as "subscriptions". The Association would typically have a Managing Committee.

The advantage of such a set-up is that it is quick, flexible and inexpensive, and there are few statutory requirements that dictate how it is run.

The disadvantages are that the individuals in control of the association are personally liable for the acts and activities of the association; it can become unmanageable if membership grows and, because it does not have any legal status, it does not have the power to enter into contracts, make bids for funding or employ people. Therefore, one of the founding partners would need to take the role of legal employer and trading entity.

4 Governance Options

1.2 Model B - Company Limited by Guarantee

This is the most common and widely understood legal model for non-profit entities in destination marketing organisations (DMOs), and many DMOs have followed this classic model. Instead of holding shares, the stakeholders are known as "members" of the company and are required to pay a nominal figure (i.e. £1) in the event of insolvency of the company; ie the company is limited by guarantee rather than shares.

The benefits of a company limited by guarantee are that it can have fairly wide ranging objectives; members' liabilities can be restricted and it is overseen by a Board of Directors carefully selected on the basis of their expertise and relative stakeholder role in the destination. Directors owe a duty to the company to act in the company's best interest and exercise reasonable care.

Disadvantages are the administrative requirement of holding Board and general meetings, as well as preparation and submission of accounts. They can also be time consuming and the company may be difficult to wind up/dissolve.

1.3 Model C - Company Limited by Guarantee with Charitable Status

A company limited by guarantee could be acceptable to the Charity Commission, if charitable status is envisaged in the future. However, it might be difficult for an organisation dedicated to the promotion of a particular economic sector (and the businesses that work within that sector), to be defined as having dedicated "charitable purpose".

Charitable status certainly brings potential benefits in terms of reduced VAT and relief on corporation tax.

However, there are distinct disadvantages to operating as a charity; a charity might face restrictions on the work that it carries out, particularly in relation to commercial work; there are considerable regulatory and administrative requirements to comply with (more so than with normal limited company status); Board members/trustees must not be paid, and this may compromise the role of the destination manager, who would ordinarily need to be one of the Board members.

1.4 Model D - Community Interest Company (CIC)

A CIC is a social enterprise, a low cost and flexible model, which has recently been selected as the model for two newly relaunched destination bodies in the South West - Visit Cornwall and Visit Devon.

It is not a separate form of company, but merely a non-profit company with certain characteristics (it can for instance be a company limited by guarantee or by shares). It is designed for social enterprises that want to use their profits and assets for the public good, with the specific aim of providing a benefit to the community. It must use its income, assets and profits for the community it is formed to serve. It will have all the characteristics of a company, including separate legal status and limited liability. Not all of the activities carried out by a CIC need to have a direct benefit to the community which it serves, but organisations must demonstrate that a reasonable person would perceive their activities as being in the interests of the community (this is an ongoing test).

Ultimately, a CIC has much in common with a charity, but, importantly, charities must be established exclusively for charitable purposes. CICs, however, can be established for any lawful purpose, as long as their activities are carried out for the benefit of the community. CICs are, thus, more flexible and subject to less regulation than charities.

4 Governance Options

Key benefits are positive PR, as it has to be run for the benefit of the community; profits are recycled back into service delivery; it can have governance arrangements (via the Board of Directors) that include the input of stakeholder groups, as well as the people of Dover; and it is able to access a wide variety of funding. Crucially, they are more lightly regulated than charities.

The usual model is for the CIC to have a small core staff and then to use freelancers or contract staff for project delivery. In this way, it remains flexible and adaptable. One body could be the sole shareholder, and charities are allowed to be the owners of a CIC.

Potential disadvantages are that it will be regulated by the Regulator of CICs, which means it also has to deliver an annual CIC report with its annual accounts (this records the CIC's activities for that year, including any details on assets transferred for less than market value, dividends paid and the remuneration of directors); and in addition to complying with the law specific to CIC, CICs must also comply with the principles of company law and the Companies Act 2006.

4 Governance Options

Option 2 - Visit Kent Management

Visit Kent is the Destination Marketing Organisation for the county, with a mission to sustain and develop the Kent tourism brand. Based in Canterbury, Visit Kent is a non-profit company with a Board of Directors drawn from the County Council, representatives of leading District Councils and key private sector players, such as Eurotunnel, Shepherd Neame and Southeastern. Its funding is based on around 70 investor/member contributions and these funds are used to leverage match funding from other sources, in particular from the EU Interreg programme (the impact of Britain leaving Europe on current bids is unknown). Dover District Council, the Port of Dover, English Heritage, P & O and Ramada Dover are all current investors.

Visit Kent aims to support destinations within Kent and has developed a number of support packages to local authorities to help their tourism industries grow. Tailored packages are available both for those local areas with a supported tourism service in place and for those without. Visit Kent's expertise can be harnessed, at an additional cost over and above core membership, to deliver dedicated research, development, marketing, business advice and national engagement activities. These services mean that a council or other body can potentially support tourism without the need for an in-house resource, with the employment obligations lying elsewhere. A clear set of objectives along the lines of a service level agreement (SLA) are set and monitored.

An option would be for a dedicated person/officer resource for Dover to be employed by Visit Kent so that an identifiable resource for the area exists and will also benefit from being part of the wider Visit Kent team, which can provide a huge breadth of skills and resources to call upon, plus the bonus of clear line management.

The benefit of reaching an agreement for enhanced Visit Kent services would be the ability to tap into existing expertise; the outsourcing of responsibility for overseeing personnel issues; flexibility to renegotiate the terms of the SLA on an annual basis

The disadvantages would be blurred lines between Visit Kent's current core services provided to Dover district; lack of PR impact at the community level; and the source of the additional funding, which Visit Kent would require.

4 Governance Options

Option 3 - Tourism Business Improvement District (TBID or BID)

A BID is a company set up to represent a defined area of a city or town centre and is funded by a special levy on all business ratepayers within that area. BIDs became popular in the USA in the 1990s and have gathered popularity in the UK over the last 10 years. There are now an estimated 200 BIDs in the UK, most centred on protecting and promoting the retail heart of town centres. In more recent years, there have been several tourism-led BIDS, which have emerged as an alternative destination funding model to promote and develop the tourist industry in a city. Two examples are Lincoln and Bournemouth. (Canterbury was modelled as a conventional BID, though it is partially evolving; it is not yet a Tourism BID.)

BIDs work on simple principles whereby businesses decide which projects they wish to undertake to improve the area and their profitability, and a business plan is prepared. A vote is then held and if the majority of businesses vote yes, and they represent at least 50% of the rateable value of those who vote, then a BID can be set up, usually for a term of five years. Every eligible organisation must then contribute a small percentage of their business rateable value (usually around 1% or 2%) and from these many contributions, a significant fund is built up to be used for destination activity. Under the legislation, the levy is mandatory on all the eligible businesses once the BID has been voted through.

BIDs emerged in the post 2009 austerity period, where local authorities have been forced to withdraw partially from town centre management and destination management activity. We are not aware at present of any plans to develop a BID in Dover.

The benefits of setting up a BID would be that it is a model capable of raising a significant annual budget for tourism, that it encourages the retail sector to contribute to the development of the visitor economy, and that the area of the BID can be exactly defined.

The potential disadvantages of a tourism BID are that they take at least two years to set up and have a cost attached; they have a mixed reputation in terms of successful delivery; critics claim that they are undemocratic and tend not to be popular with small businesses; and some BIDS have been criticised for being dominated by the large multiple retailers.

4 Governance Options

Summary of key benefits, disadvantages & risks of each potential option

	New Company - Destination Dover	Visit Kent Management	Tourism BID
Key Benefits	Focus on Dover town Focus on delivery Statement of intent	Easy to arrange Engage with expertise of VK Flexible	Can raise significant funds Clearly defined destination area
Disadvantages	Requires new company to be set up	Local stakeholders less engaged High management costs	Can take two years to set up Likely to be promotionally focused and not strategic
Risks	Lack of full commitment of any of the 4 identified key partners	Unlikely to elicit further funding from key local stakeholders	Can be unpopular with small businesses Retail sector focus

Recommendation

Our recommended option is Option 1 - setting up a new company, modelled as either a CIC or a company limited by guarantee.

In order to reduce costs, the new company could be housed by Dover Big Local/Red Zebra, as their independence from the tourism sector and lack of any political constraints would be seen as advantageous and community-focused.

5. Proposed Launch Action Plan

This is an outline for the Destination Dover Interim Board to consider at its first meeting on 8 July.
Actions, timetable, outputs and monitoring need to be agreed and added to the plan

July to November 2016

Action	Date/timing	Outputs and Monitoring	Notes
Set up Interim Board			
Commit to meeting 3 times or until new governance structure set up	8 July, 3 August 9 September		
Employ Destination Manager Agree: Timetable Job description Terms and conditions Advert content, schedule and location Interview panel Office location and hot desk arrangements Agreement to centralise funding for first six months to pay the manager	October 2016		
Agree structure and governance for Destination Dover			Will require legal advice
Agree priorities for first 3 months and first year including actions, timetable, outputs and monitoring			
Consider the Destination Management model as a basis for a strategy for Destination Dover			See Section 2 of the report
The first three months of Destination Dover (DD) starting 1 January 2017 **Develop partnerships with:** Coastal Communities Team Members of the Destination Dover board Bluebird Heritage Trail Greeters Tourism South East Visit Kent Visit Britain Dover Arts Development Sandwich and Deal Calais and Boulogne Tourisme Town Team East Kent Districts Pas de Calais Tourisme	From January 2017	To be agreed	

5. Proposed Launch Action Plan (continued)

Action	Date/timing	Outputs and Monitoring	Notes
Set up working groups to establish DD role in 1. Marketing strategy Digital, web, social media, press & PR 2. Wayfinding and signposting To and from cruise terminals, port, promenade, castle, cliffs, heritage attractions, museum, station, car and coach parks, 3. Cruise (use existing group) Role of businesses, review Greeters, information provision, training and relationship with cruise partnership 4. Events and Festivals Work with partners to consider development of major new town event for 2018 5. Funding • Discover England fund (Visit Kent) • South East Local Enterprise Partnership tourism fund (September) • Interreg (investigate what will happen with the cycling project that partners have signed up to) • Heritage Lottery Fund • National Coastal Tourism Academy • Coastal Communities Fund • Business Improvement District 6. Research • Consider recommendations from the report • Establish what can be done at low or no cost			
Industry communications and development • Inform businesses of progress with Destination Dover • Liaise with local press/press releases • Case study for tourism bodies • Develop training for tourism businesses on customer care, how to develop websites, write good promotional material and use social media effectively • Familiarisation visits for front line staff - understand new projects etc being developed			

6 Research Recommendations

1 Visitor Profile Survey

The last major survey of visitors in Dover was produced in 2008. We recommend that a new survey is commissioned of a similar size and methodology as the 2008 survey to enable comparisons of profile and attitudes amongst visitors.

a. Cost - £10,000 to £12,500
b. Timing - summer 2017

2 Economic Impact Data for 2015

Work with Visit Kent and Dover District Council to produce.

a. Contribution Cost - £750
b. Timing - end of 2016 once all 2015 data is available

3 Research database

We recommend that a simple research database is established as a profile of the tourism industry in Dover. The data already gathered for this study presents the baseline data from which to develop this. It will need to be refreshed and updated each year with new data as other research is commissioned and produced.

a. Cost - nil
b. Timing - Spring 2017

4 Cross Channel Tourism

Much expensive research work has been carried out over the last 20 years into understanding the cross channel tourism market. We do not propose that this is revisited, but there are opportunities to work with the main carriers (DFDS and P&O) to extract greater information about the market from their own ongoing and future planned research, especially in relation to perceptions of inbound visitors.

a. Contribution Cost - in kind
b. Timing - spring 2017

5 Cruise Market

Rather than a research exercise, we recommend a review be commissioned of the local support and local marketing given to cruise ship passengers. This would be best negotiated as a joint exercise with Visit Kent.

a. Contribution Cost - £1,000
b. Timing - 2017

6 Research into themes and content for future town trails and itineraries by foot.

We suggest that a working group be set up with representatives of the Dover Society (Bluebird Trail) and local guided walks operators to develop three new walking trails linking the seafront and town centre, based on possible themes such as:

- Arts and sculpture
- Roman Dover based around the Roman Painted House
- Architectural highlights

a. Contribution Cost - to be determined and can be included in funding applications
b. Timing - Spring 2017

7 Key projects research

Listed in the Dover Coastal Community Team Economic Plan 2017-2021. A project development fund is required to support the development of these initiatives plus other important ongoing work related to tourism signposting and wayfinding.

a. Contribution cost - to be determined
b. Timing - Autumn 2016

These research recommendations will be considered by the Dover Destination board and prioritised for funding and action

Appendices

Appendices

1. Headline Tourism Data
2. Summary of Research Reports
3. Benchmarking Report
4. SWOT Analysis

7 Headline Tourism Data April 2016

1 UK Tourism*

- Value of UK tourism - £127 billion, 9% of UK GDP (2013)
- Employs 3.1m people (UK's 3rd largest employer)
- Over 262,000 tourism businesses in the UK (10% of all businesses)
- Since 2010, tourism has been the fastest growing sector in the UK in employment terms
- Predicted to be 10% of UK GDP by 2025
- Revenue generated as follows:
    - £54bn from day visits
    - £23bn domestic tourism
    - £22bn inbound
    - £28bn outbound and air fares (i.e. via outbound businesses, UK based airlines, taxes etc)
- UK is 8th largest tourism destination in world, ranked by visitor numbers and expenditure
- Inbound tourism (2014)
    - 34.4m visitors spending £21.8bn
    - Provisional figure for 2015 visits - £35.8m
    - Average spend - £624
    - Average length of stay - 7.5 nights
    - London accounts for 54% of all inbound tourism spend
- Domestic tourism
    - 114m visitors spending £23bn
    - Average spend - £198
    - Average length of stay - 3.1 nights

**Source Visit Britain/Tourism Alliance*

7 Headline Tourism Data April 2016

2 Kent Tourism

Economic impact data for the tourism sector was last measured in early 2015, based on 2013 data. It is expected that the next impact study will be conducted by Visit Kent in late 2016/early 2017, based on 2015 data. The figures were derived using the Cambridge Economic Impact Model undertaken by Tourism South East (TSE) and the report was compiled by The South West Research Company (TSWRC). The figures for Kent include Medway.

Kent	Total Visitors	Staying Visitors Trips	Day Visitor Trips	% of Staying Visitors from outside UK	Total Direct Spend	Staying Visitor Spend	Day Visitor Spend	Jobs Supported FTE	Actual Jobs	Value of Tourism (incl. induced impact)
2013	58.3m	4.6m	53.7m	21%	£2,702m	£831m	£1,871m	48,832	67,931*	£3,445m

Approximately 12% of all jobs in Kent

Of the total direct spend, the spending mix is shown below

Spend Category	%
Accommodation	11%
Shopping	37%
Food and Drink	31%
Attractions/Entertainment	10%
Travel/Transport	12%
Total	100%

In terms of jobs supported by tourism in Kent, comparisons with 3 counties are shown below.

County	Number of FTE Jobs Supported
Kent	48,832
Essex	40,924
Norfolk	41,069
Somerset	26,156

7 Headline Tourism Data April 2016

3 Dover Economy and Tourism

3.1 Dover Demography and Economy

- Population of Dover District is approximately. 113,000
- Estimated population of Dover town (including the parishes of St Margaret's, Guston, Whitfield and Capel-le Ferne) is 44,290
- Dover district is the fourth most deprived district in Kent
- Current annual unemployment rate is 5.4% (Kent average 2.8%)
- 58% of households are owner occupied (Kent average is 67%)
- 18% of houses are rented from the local authority or housing associations (Kent average 14%)
- Car ownership is relatively low - 30% of households without a car (Kent average is 20%)
- 70% of over 50s have long term health problem or disability (Kent average 52%)
- Port activities directly employ 4,000 and support 22,000 jobs in the wider economy

All data above is taken from the recently published Dover Coastal Community Team Economic Plan 2017-2021

3.2 Economic Impact of Tourism in Dover District

Summary data related to Dover district from the Kent-wide economic impact study on tourism (described above) is presented below

Dover District	Total Visitors	Staying Visitors Trips	Day Visitor Trips	% of Staying Visitors from outside UK	Total Direct Spend	Staying Visitor Spend	Day Visitor Spend	Jobs Supported FTE	Actual Jobs	Value of Tourism (incl. induced impact)
2009	3.85m	0.44m	3.41m	16%	£181m	£78.3m	£102.7m	n/a	4,418	£211m
2011	3.9m	0.42m	3.47m	18%	£185m	£80.5m	£104.5m	3,776	4,559	£244m
2013	4.05m	0.38m	3.65m	19%	£191m	£79.8m	£111.4m	3,705	5,140*	£248m

**Approx. 16% of all jobs in Dover District*

7 Headline Tourism Data April 2016

The table below shows key impact figures for Dover compared to the other Kent districts

District (2013)	Domestic Trips 000s	Overseas Trips 000s	Domestic Nights 000s	Overseas Nights 000s	Total Staying Spend £m	Day Visitor Trips £m	Day Visitor Spend £m
Ashford	283	101	770	433	71	3.8	133
Canterbury	466	169	1,439	1,171	142	6.4	213.8
Dover	311	74	942	403	80	3.7	111.4
Gravesham	147	35	398	199	24	1.7	48.4
Maidstone	291	76	780	446	65	3.7	121.1
Medway	425	92	1,290	582	89	4.0	134.6
Sevenoaks	170	59	455	307	42	3.6	126.8
Shepway	374	66	975	366	75	4.0	122.1
Swale	351	39	1,251	270	55	4.5	135.7
Thanet	340	118	998	669	95	2.9	106.4
Tonbridge & Malling	191	43	553	261	37	2.5	80.9
Tunbridge Wells	250	58	750	370	58	4.0	145.5

- Dover has similar levels of staying visitors as Shepway and Maidstone
- Over the last 5 years however, numbers of staying visitors have declined
- There has been a decline in guest house bed stock - only partly replaced by new budget hotel supply

7 Headline Tourism Data April 2016

3.3 Port of Dover Statistics*

	Vessels Entering Port	All Passengers	Tourist Cars	Coaches	HGVs	Cruise Ship Calls
2012	17,202	12,129.491	2,400,471	84,246	1,952,138	147
2013	19.441	13,004,077	2,471,193	90,478	2,206,728	143
2014	18,669	13,481,599	2,456,817	96,576	2,421,537	122
2015*	16,869	13,190,117	2,335,531	96,592	2,539,918	n/a

**Port of Dover Annual Report 2015*

Ferry Market

- Passenger numbers are likely to be down in 2016, partly due to the Calais crisis
- Passenger numbers peaked at 21m in 1997 - the height of the duty free era
- Coach traffic through the port has almost halved since 1997, but HGV traffic is increasing
- Long term growth in ferry traffic is expected, but will be mainly freight/HGV orientated
- NB: the 13.3m movements number includes approx. 4m freight/HGV drivers, so actual tourist passenger movements are around 9.3m
- The majority of these go through the port twice (i.e. en route to their destination and on return,) so actual visitors who pass through Dover each year are estimated to be around 5m
- 80% of cross channel trips originate in the UK (taken from 2007 cross channel survey) - i.e. circa 4m ferry visitors are UK and 1m are overseas visitors
- 80% do not stop in Kent; only 7% stop overnight in Kent (2007 survey)
- Approximately 25% to 30% of ferry traffic is day visit-related
- It can be estimated that perhaps 10% (at most) of ferry passengers stop in Dover - perhaps 0.5 million visitors. Most of these will visit either the castle or the White Cliffs

7 Headline Tourism Data April 2016

- The cross-channel study, conducted in 2006/7, concluded that there is limited opportunity to stop ferry passengers. They are either focused on getting to their ultimate holiday destination, or getting home as quickly as possible after their holiday.
- Short stops are possible if passengers arrive for their ferry early; these are likely to involve a quick stroll/stretching legs on the waterfront. The St James development and the lure of easy parking, plus some branded shops/restaurants will help to persuade some additional ferry bound visitors to stop in town.

Cruise Ship Calls

- Numbers of cruise passengers vary from year to year, but tend to be around 200,000 on average
- Typically, there is 1 crew member per 2.5 passengers, so total numbers of passenger and crew each year is circa 280,000
- Cruise ship numbers seem to have stabilised over the last 10 years (2014 thought to be a one-off blip)
- For comparison, Southampton had 700,000 cruise passengers in 2014
- Approx. 20% of cruise calls are port of call, with 80% being turnaround (i.e. start and finish in Dover)
- Turnaround is considered more valuable for the port and destination - as it involves longer port calls, spend in port by crew and an opportunity for the port destination to gain overnight stays from passengers both before and after the ships departure/return
- However, the Cruise industry markets Dover port as "London-Dover" - this does tend to lead to passengers (especially from USA) staying their pre-departure night in London. A 2007 survey (Impact of Cruise Market on East Kent Economy) estimated that only 5% of cruise passengers stayed overnight in Dover
- In terms of spending some time in Dover though, in 2007, around 50% of cruise passengers chose to visit Dover Castle or Dover town (the other 50% visiting Canterbury, Leeds Castle, other destinations or staying on board)
- Though there is no evidence of any research into the average profile of cruise passengers leaving from or visiting Dover, there is a predominance of Baltic cruises and of medium scale ships calling at the port. The typical profile of cruise passengers is:
  - Older demographic - average age is now circa 50 (it is falling gradually)
  - High proportion of retirees - approx. 40%
  - Well above average wealth
  - Couples
  - Significant proportion of US travellers

7 Headline Tourism Data April 2016

3.4 Dover Town Visitor Survey 2008 (Britton McGrath) - Key Findings taken from Executive Summary

Total Sample

- 858 face-to-face interviews in 7 locations in August/September 2008 - only non-locals
- Visitors were skewed slightly to older age groups (compared to the UK population as a whole)
- Split of sample - 72% UK and 28% overseas
- Analysis split amongst core visitors and those interviewed at port (i.e. mostly transit visitors)

Visitors Interviewed in Town, Castle and White Cliffs (sample of 721)

- High proportion of visitors have been to Dover before
- 64% on day trip from home
- Just over 50% of overnight visitors staying in or just outside Dover
- Overseas visitors far more likely to be staying in town
- Average length of overnight stays - 4.9 nights
- Most people were visiting for general leisure purposes, though 31% participated in walking/rambling
- 64% claimed to have visited or planning to visit 1 or more attraction - Castle and White Cliffs are the most popular

Visitors Interviewed in Port (sample of 137)

- 43% en route to France/Europe; 28% on day trip crossing
- 77% had been to Dover before
- 61% had come from home that day
- Most ferry passengers arrived between 30 mins and 2 hours of their scheduled departure
- Only 13% were planning to spend time in Dover - lack of time was main reason
- Few positive reasons for spending time in Dover were offered
- 48% claimed an intention to visit Dover at some future point (NB likely to be "research over-claim")
- 29% said "nothing to see or do"; 25% said "Dover is not a holiday destination"

7 Headline Tourism Data April 2016

Satisfaction

- 80% of those staying overnight rated their accommodation as good or very good for quality
- VIC rated highly
- Dover Castle, White Cliffs and Museum all rated highly - over 90% approval
- Aspect of Dover rated poorly - maps and information boards

Perceptions

- Dover most associated with port, White Cliffs and Castle
- No longer spontaneously associated with asylum seekers and immigrants
- Main sample - Over 80% considered it to be an attractive seaside town
- 70% appreciated the open spaces on the cliffs as a great natural asset
- Strong negative perceptions among the non-visitors (esp. those at the port) - only 10% rated Dover as an attractive town
- General agreement that Dover was badly in need of a facelift

Reactions to Proposed Improvements

- Improvements felt most necessary were:
  - Better explanation of Dover's heritage and history
  - Better links between town and Castle
  - Improvements to town centre
- Ideas for improvement presented by researcher which would be most welcomed:
  - Refurbishment of run-down buildings (80% of sample)
  - New heritage trail (70%)
  - Pedestrian bridge linking town centre with waterfront (70%)
  - Cable car (60%)

8 Summary of Research Documents April 2016

Key documents and studies produced over the last decade related to tourism issues in Dover and East Kent are listed chronologically and summarised here for their content and usefulness. A star system has been employed to indicate their current value as sources of data and ideas (no stars indicating limited value and three stars indicating high value and relevance).

There was a spate of activity and commissioning of studies around 2007-2010, partly attributable to the drive given to local regeneration by Dover Pride. Since then, the only tourism studies have been conducted by Visit Kent or English Heritage. The most recent detailed visitor survey for Dover town was undertaken in 2008 - though it remains revealing and valid.

The documents are listed in star rating order, alphabetically, as in the table above with Tourism Specific studies first, economic regeneration studies second and east Kent or wider studies third.

	Dover Specific Tourism Studies	Dover Economic/ Regeneration Studies	East Kent or wider Kent Tourism Studies
High Interest/Use***	Coastal Community Plan 2016 Dover Castle Visitor Survey 2014 Dover Visitor Survey 2008 Economic Impact of Tourism 2011	Dover Big Local Plan 2015 Dover Cultural Framework 2010 Dover District Heritage Strategy 2013 Local Development Framework 2010	Economic Impact of Kent Visitor Economy 2013
Medium Use**	Castle Connections Study 2006 Cross Channel Tourism Study 2007 Dover Hotel Market Report 2011 Dover Hotel Market Study 2009 Tourism Development Strategy 2009		Vision for Kent Coast 2013
Some Use*		Dover Transport Study 2008 Port of Dover Annual Report 2014	East Kent Cruise Study 2007 East Kent Perceptions Study 2007 Kent Hotel Hotspots 2011
Specialist Use*		Dover Waterfront Study 2008	Kent Coastal Signage Report 2012

8 Summary of Research Documents April 2016

HIGH INTEREST/USE***

Dover Specific Tourism Studies

Coastal Community Team - Economic and Project Plan 2016 ***

- Need to shift from transit town to destination town
- High levels of retail leakage to Canterbury, Folkestone and Westwood Cross, Broadstairs
- Goal - to become one of England's top 10 visitor destinations
- Revival of heritage assets; promotion of cultural tourism; establish river walk; develop skills academy based on heritage restoration
- Project draws together wide cross section of the community
- Establish a team to become the key driver for tourism - "Destination Dover"
- £30m worth of projects (16 in all) - bidding for circa 10% contribution
- Many projects have a tourism or cultural related use

Dover Castle Visitor Survey 2014 (English Heritage)***

- Based on 195 interviews, summer 2014 - this is a comparison of the Castle to other English Heritage (EH) sites
- Age profile - under 34 (14%); 35 to 54 (43%); over 55 (43%)
- Higher proportion of day trip visitors than other EH sites (64%)
- Higher proportion of domestic visitors then EH average (80%)
- Higher proportion of members than EH average (36%)
- Higher proportion of families and experience seekers
- High repeat visitation (46%)
- Visitor experience is rated higher than any other EH property
- Very much considered a "destination site"
- On-site events have major impact on visitor experience
- Catering offer is not rated highly
- Approximately 95% of visitors to Castle arrive by car

Dover Visitor Survey 2008 (Britton McGrath)***

- 858 face-to-face interviews conducted in town and port in summer 2008 (72% UK, 28% overseas)
- Methodology matched that of a previous survey in 2001
- Visitors value the castle and the walking/cliffs
- Only 13% of the port sample were planning on going into Dover
- Non visitors gave strong negative perceptions
- Over 50% of all respondents agreed that Dover needed a facelift
- The town was no longer spontaneously associated with asylum seekers and immigrants
- In terms of positive perceptions by visitors to Dover (excluding port sample):
- Over 80% think it an attractive seaside town
- Just under 70% appreciate the open spaces on the cliffs as a great asset
- However, there are a number of strong negative perceptions, particularly among non-visitors - i.e. ferry passengers
  - Less than 10% rate Dover as an attractive seaside town
  - Less than 10% would appear to be aware of the accessibility of the open spaces on the cliff

8 Summary of Research Documents April 2016

- Less than 20% agree that there are plenty of bars and restaurants in Dover
- Among both visitors and non-visiting ferry passengers, there is general agreement that Dover is badly in need of a facelift

Economic Impact of Tourism in Dover 2011 (Tourism South East/Visit Kent)***

- See Headline Tourism Data (Appendix 7)

Dover Economic/Regeneration Studies

Dover Big Local Plan 2015***

- Result of detailed community consultation
- Tourism relates to all 5 DBL themed working groups
- River revival/management is a key theme
- Projects include:
  - Tourism research project
  - Promoting idea of an arts/performance hub
  - Promoting new festivals and craft markets
  - Dover Community Roman Garden and other enhanced green spaces
  - Tree planting and signage improvements
- Small grant scheme set up and DBL mentors available

A Cultural Survey and Framework for Dover, 2010 (MUF Architecture/Art)***

- Commissioned by Dover Pride and funded through the Sea Change programme
- Steering group included Dover Arts Development (DAD)
- Extended interviews with residents and key players
- Proposes 3 guiding principles for future cultural investment:
  - Promote existing assets
  - Enrich rather than bolt on
  - Build on identity of purposefulness and playfulness
- Does not advocate any new "grand projects"
- Suggests lower key arts-based enhancements of museum, Townwall Street underpass, and more arts use of museum and Discovery Centre
- Ambition - Dover will be an international exemplar of a cultural host town by 2020
- This will attract international cultural players to base projects in Dover
- The Cultural framework is well regarded by arts community and DAD in particular

Dover District Heritage Strategy 2013***

- Co-authored by English Heritage and DDC
- Dover is a gateway in times of peace and a frontline in times of war
- Detailed review of District's history, heritage assets and key themes

8 Summary of Research Documents April 2016

- Heritage assets in District (all of which make an important contribution to the built environment and overall tourism product)
  - 48 scheduled monuments
  - 1,926 listed buildings
  - 57 conservation areas
  - 6 registered parks and gardens
  - 1 protected wreck site
- Assessment of significance and vulnerability
- Makes case for further heritage led regeneration, which would be significant in tourism terms
- Emphasises the contribution which the heritage environment could make to the future development and enhancement of the "sense of place" of Dover town
- Highest quality of design and materials are required for regeneration schemes incorporating heritage assets
- Advocates more community initiatives to improve public access to heritage sites

Local Development Framework Core Strategy 2010 (DDC)***

- 15-year plan
- Could see increase in town population of circa 10,000 over next 20 years
- Dover allocated Growth Point status in 2007 by Homes and Communities Agency (HCA)
- Imbalance between Dover's status and awareness - and its performance
- Port of Dover estimate that freight traffic likely to double over next 30 years
- Provides outline development visions for Port, mid-town, Connaught Barracks, Dover Waterfront and Whitfield.
- Mid-town - around redundant British Telecom building - mostly in public ownership - offers development potential
- Various Development Management planning policies stated at end of report. Whilst there are no specific tourism policies, Policy DM19 (Protection of Historic Parks and Gardens) and Policy DM25 (relating to Open Space) are relevant

East Kent or wider Kent Tourism Studies

Economic Impact of Kent Visitor Economy 2013 (Tourism South East/Visit Kent)***

- See Headline Tourism Data (Appendix 7)

8 Summary of Research Documents April 2016

MEDIUM USE

Dover Specific Tourism Studies

Castle Connections 2006 (Britton McGrath)**

- Profile of tourism and review of options to improve castle/town connections
- Good review of a number of unfulfilled projects in the 1990s and early 2000s
- Negative perceptions revealed - traffic, immigration, port, scruffy town centre
- Recommendations to improve connectivity and visitor traffic - events, public realm improvements, temporary visitor attraction
- Review of innovative transport connection ideas - cable car (last detailed work 1995), DUMPY/funicular, Guilford shaft - all rejected by Britton McGrath
- Proposed consideration of observation tower, big wheel; or removal of car parking at Castle

Cross Channel Tourism Study 2007 (Arkenford)**

- Study conducted in 2005-6 and followed similar study in 1999-2000
- Survey of 13,000 Cross Channel travellers, with 1,000 follow up telephone interviews and 8 focus groups - including ferries and tunnel
- 80% of cross channel trips originate in the UK
- Day trips account for 30% of cross channel traffic
- Of the 11m trips passing through Kent, 79% do not stay in Kent; 6% stop for up to 2 hours; 8% for a day; 7% overnight
- Conclusion - the opportunity is to sow the seeds for future stops/visits - exhibitions at terminals, screens on ferries, information at petrol stations, tourism signage around ports etc

Dover Hotel Market Fact File 2011 (Visit Kent/Hotel Solutions)**

- Drawn out from Kent Hotel Futures Study by Hotel Solutions
- Based on hotel supply only (not B&B or self-catering)
- In 2011, report assessed current hotel room supply at 464 rooms
- 100-bed Travelodge will be part of St James redevelopment
- Possible new hotel as part of Western Docks marina scheme
- In summer and all school holidays - high occupancy rates -90% plus
- Minimal residential conference market
- Cruise market boosts summer occupancies
- No recommendations for development were made but prospects for growth in key markets was rated as "good" subject to progress being made with the key regeneration projects.

Dover Hotel Market Study 2009 (Christie and Co)**

- Commissioned by SEEDA and Regeneration Partnership to assess future hotel needs
- Assumed 100 bed budget hotel will go ahead at St James to replace County
- Recommend 200 bed upscale mid-market hotel for waterfront or Western Heights
- Further opportunity for 100 bed mid-market hotel along port approach or Whitfield

8 Summary of Research Documents April 2016

Distinctively Dover Tourism Development Strategy 2009 (Britton McGrath)**

- Tourism development strategy for Dover - regarded as being at a "tipping point"
- Key issue - 3 major attractions are outside town centre - there is a two-tier offer
- Lots of "missed" heritage - distinctiveness is hidden
- Keen on cable car
- Vision for Brand Dover is offered:
  - Celebrate town's natural and built heritage
  - Join the dots that make up the whole of the Dover story
  - Present Dover as a modern outward facing town
  - Turn the gateway status around to make it a positive attribute
  - Create a cluster of attractions in the town centre to develop a sense of critical mass
  - Reconnect the seafront with the town centre
  - Ensure tourism support facilities (e.g. Visitor Information Centre) are located where they should be

East Kent or wider Kent Tourism Studies

Kent's Tourism Future - a Vision for the Kent Coast 2013 (Acorn Tourism Consulting)**

- Part of CAST Interreg project (see above) overseen by Visit Kent
- Vision for East Kent coast to harness its distinctiveness
- Advocates small scale investment along lines of:
  - Character buildings - re-adaptation of heritage sites for holiday accommodation
  - Reinvention and style makeover of beach huts
  - Improving the management of and customer offer on beaches
- Advocates potential for East Kent districts to work together to realise vision
- Persuasive vision though lacking in delivery ideas

8 Summary of Research Documents April 2016

SOME USE

Dover Economic/Regeneration Studies
Review of Dover Transport Study 2008 (SEEDA/Peter Brett)*

- Mode share of rail to commute to work is low compared to rest of Kent
- Railway station comparatively lightly used - poorly integrated with town centre
- CTRL will reduce rail journey times to London by 38 mins
- Radial bus network
- No park and ride
- 85% of all port traffic uses M20/A20
- Severance of town centre from seafront
- Dover has net inbound commuting - twice as many commute in to work than commute out
- Key recommendations
  - Proposes land bridge /super-crossing at Townwall St/York St
  - Move bus interchange to York St
  - Encourage more HGVs to use A2 to access port
- *Postscript - CTRL (despite the current line rebuild issue) has clearly made a significant difference to Dover's accessibility - albeit it is yet to see the dramatic rise in commuter traffic seen in Folkestone and Canterbury*

Port of Dover Annual Report 2015*

- Cross channel freight traffic expected to rise by 40% up to 2030
- Key traffic data is summarised in linked "Headline Data" document
- 2015 passenger traffic through the port -13.2 million

East Kent or wider Kent Tourism Studies
East Kent Cruise Economic Impact Study 2007 (Roger Tym)*

- Cruise sector - Local economic impact of circa £20m a year
- Dover has a limit of 300 metre vessels (medium sized)
- Crew are a substantial element of the impact (one third of all spend)
- Leakage of spend out of Dover due to poor retail and High Street and popularity of Canterbury as an excursion

East Kent Perceptions Study 2007 (Arkenford)*

- A summary document in the form of a power-point presentation
- Survey of 1,500 people (mainly in South East England)
- Tested awareness of 40 destinations in East Kent and wider South East
- After Brighton, Dover had highest awareness (e.g. higher than Eastbourne and Hastings)
- The White Cliffs - most well-known rural destination in East Kent
- But Dover lacks identity and emotional resonance (perceived to be strong for heritage and scenery, well known as a port, but lacking in any strong emotional offer/pull)

Kent Hotel Development Hotspots 2011 (Visit Kent/Hotel Solutions)*

- Telephone survey of 28 UK and international hotel companies (representing 50 brands)
- Development interest in Dover was expressed by 5 of these brands, (highest was Canterbury - 12). Interest was expressly for budget and upper tier budget
- Rated Dover as a "simmering" rather than burning hotspot

8 Summary of Research Documents April 2016

SPECIALIST USE

Dover Waterfront Study 2008 (BBP Regeneration)

- Draft report considering all potential transformational development around waterfront, esp. related to the Western Docks revival project
- Not a tourism report - a wider regeneration and planning report

Kent Coastal Signage Audit Report 2012 (Acorn Tourism Consulting)

- Part of Visit Kent's CAST project (Coastal Actions for Sustainable Tourism)
- Part funded by the EU cross-border Interreg programme
- East Kent wide analysis - some relevance for Dover town - but audit only - no recommendations drawn
- 78% of all visitor signs in DDC area considered to be "ok"; 22% considered to be worn, vandalised, out of date or redundant
- Dover District Council recognise that improvements to tourism signage and way finding are required
- Mentions some of the issues - clutter, graffiti, not welcoming - lot of "don't do" and out of date signs etc

9 Benchmarking Assessment

Three destinations have been selected for benchmarking, chosen (District comparisons) as they are illustrative of progressing tourism and culturally-inspired regeneration. This is only an initial exercise and is presented here for illustrative purposes. There may be merit in extending such an exercise as part of the research and development activity of a new dedicated destination manager for Dover. The destinations selected here are:

- **Shepway** - a mainly rural district like Dover, with many commonalities in terms of scale, tourist product, image and economic challenges. Crucially though, its core town destination (Folkestone) has been on a path of sustained cultural regeneration over the last 10 years.
- **Hastings** - a smaller and more urban district, centred on the coastal resort of Hastings town, but with similar levels of tourism and recent impetus to its regeneration efforts.
- **Hull** - a much larger urban area, but always seen as a port rather than a tourist destination. Hull has looked towards cultural regeneration for a decade or more, but is only now making progress, largely as a result of its selection as the UK's capital of culture for 2017.

9 Benchmarking Assessment

	Dover	Shepway	Hastings	Hull
Population	113,000	109,000	91,000	258,000
Area	315 sq. km	357 sq. km	30 sq. km	72 sq. km
Unemployment Rate (Average 2015)	5.5%	5%	8%	9%
Staying Visits (Volume)	0.38m	0.44m	0.42m	0.35m
Day Visits (Volume)	3.65m	4.00m	3.11m	4.4m
Total Value of Tourism	£248m (2013)	£235m (2013)	£245m (2012)	£260m (2013)
Jobs Supported by Tourism (% of all jobs)	5,140	4,509	3,856	5,610
Major Attraction (and visitor numbers)	Dover Castle (345,000)	Port Lympne Reserve (205,000)	Jerwood Gallery (est. 50,000)	The Deep Aquarium (460,000)
Assessed Serviced Accommodation Stock	830	2,280	500	n/a
Unique Visits to Web Site Home Page (2013)	91,936	309,578	315,871	n/a
Brand	White Cliffs Country	Discover Folkestone, Hythe, Romney Marsh	1066 Country	Yorkshire's Maritime City Hull and East Yorkshire
DMO	None, represented by Visit Kent	None Represented by Visit Kent	1066 Country Marketing	Visit Hull and East Yorkshire Partnership
Major Events	Port of Dover Regatta	Folkestone Book Festival Folkestone Triennial	Hastings Old Town Week Jack in the Green Festival 1066 International Festival	Hull Jazz Festival Freedom Festival
Major Current/ Planned Activity	St James retail quarter opening 2018. Western Docks Revival Project - new hotel, improved marina, retail.	£200m harbour and seafront development - completion in 2025. £7m indoor skate park - 2018. Next Triennial - 2017.	£4m Jerwood Gallery opened in 2012. Pier re-opened in 2016 after £14m restoration.	UK City of Culture 2017. £100m fruit market development - 2019.

Source: British Destinations - Destination Performance 2013/14 plus additional primary research. The data above is based on the District not the specific town or city.

9 Benchmarking Assessment

SHEPWAY/FOLKESTONE

The wider Shepway area offers a diverse tourism product, but most recent activity and destination improvements have been focused on Folkestone's old town/seafront and its cultural revival. Destination management, however, remains fragmented and lacking in leadership.

- Folkestone lacks a major tourist attraction (unlike Dover) and has lost its port status
- Although it has seen a decline in hotel bed-stock over the last two decades, it has more serviced accommodation than Dover, though occupancy levels tend to be lower and more seasonal
- Roger de Haan's Creative Foundation was founded in 2002 and has overseen the revival of Folkestone's old town into a new creative quarter, with a cluster of galleries centred around the Quarter house arts centre and new Paynes Park
- The arts theme is re-enforced by the successful Triennial Arts Festival (next due in 2017) and by the annual Book Festival
- The ambitious harbour development looks finally set to begin in 2017 and is likely to have a further impact on positive perception change of the town
- Destination management is low key in Folkestone, with Shepway District Council having a benign influence and current reliance on countywide activity led by Visit Kent. This may change, as there is currently a Destination Management visioning exercise being undertaken by consultants.

9 Benchmarking Assessment

HASTINGS

Hastings has long headed deprivation indices for the Southeast, but the last five years have seen a significant change of fortunes and some progressive regeneration, characterised by the recent reopening of the historic pier.

- Officially the most deprived town in the Southeast
- Ranked third in England for density of heritage assets
- £4m Jerwood Art Gallery opened on the Stade (seafront) in 2012
- Old town now a centre for galleries and vintage shopping
- Creative professionals and artists re-locating to town from London and Brighton
- Pier re-opened in May 2016 after £14m redevelopment. The "people's pier" was restored with Heritage Lottery funding, but also with significant community investment
- Major Heritage Lottery bid being prepared to expand Hastings Castle as a visitor attraction
- Brighton University has established a campus in Hastings, though recently announced it was scaling back future investment
- There is no official DMO for Hastings (the Council is still the lead body), but there is a marketing DMO of sorts for 1066 country, which includes the wider areas of Rye, Battle and Bexhill. This is a marketing partnership, which includes three District Councils (Hastings, Wealden and Rother), the County Council and various sector partners, such as English Heritage and the National Trust

9 Benchmarking Assessment

HULL

Hull is a significantly larger urban area, but displays some interesting parallels with Dover in terms of its heritage diversity, port status, and perception issues. The award of UK Capital of Culture status for 2017 is transforming its tourist identity.

- The UK's third largest port until the late 1970s, Hull then suffered 30 years of decline in the traditional shipping and fishing industries
- Rated officially as the UK's poorest city in 2010
- Alexandra Dock now being transformed into a renewable energy hub and green port
- Culture at centre of 10-year City Plan, 2013 to 2023
- Estimated 14% rise in visitor numbers in 2014 - over the 2013 figures shown in the table above
- Emergence of Humber Street creative quarter centred around the old fruit market - set for £100m renaissance
- Perception change signified, as Hull was ranked 8th in Rough Guide's global "cities to visit in 2016"
- £25m public realm investment over last two years as the city approaches its Year of Culture
- New Hilton and Radisson hotel schemes opening in 2017
- The DMO (Visit Hull and East Yorkshire) is a partnership between Hull City Council and East Riding of Yorkshire Council (which includes the Yorkshire Wolds, Beverley and the coastline to the east of Hull, including the resort of Bridlington). It was established in 2007 and has remained a public sector-led DMO (not a membership model), which seeks private funding for campaign and project initiatives

10 SWOT ANALYSIS

STRENGTHS

Very high brand awareness

High concentration of heritage assets

World-class attractions in Dover Castle and The White Cliffs

Iconic scenery

Rich in military history (also civil, religious and cinque port)

Set in an Area of Outstanding Natural Beauty

High-speed rail link to London

Proximity to France

Strong volunteer base

DBL - local community supports tourism growth

Large number of potential visitors due to the port, the Castle and the White Cliffs

Sea sports facilities

Cross Channel swimming

Water front and beach

WEAKNESSES

Relatively uncoordinated tourism industry

No tourism management specifically for the town

Poor connections between the multiple smaller attractions

Poor connection between the Castle and the town, and the White Cliffs and the town

Topography

A20 divides the town centre from the seafront and can get congested with lorries

Transit town (for ferry and cruise passengers)

Lack of signage

Lack of awareness of the good quality eating and drinking outlets

Limited shopping appeal

Deprived area

Lack of skilled labour force

Lack of destination hotels and restaurants

No up-to-date visitor market intelligence

Lack of leisure facilities

Limited events calendar of wider interest

Reluctance by private sector to invest in flexible trading hours

Poorly maintained/empty premises (private and commercial)

10 SWOT ANALYSIS

OPPORTUNITIES

DBL's support of tourism

Setting up a business-focused Destination Dover to which all can contribute

Enthusiasm of local people to harness Dover's offer

Various regeneration efforts

The development of the port and marina

The development of St James' shopping centre

Room for more quality eating and drinking outlets

Older, active population with more time for leisure activities and volunteering

The council's heritage strategy

The economic plan

The Coastal Communities proposal

East Kent College and the Maritime Skills Academy could offer a trained work force

Exploit the potential of transit visitors

Connect with visitors to castle and cliffs

The 'Greenbridge' linking the town and the seafront

Cutting out the cross traffic between eastern and western docks (A2 dualling and division of traffic to east and west)

Proximity to London, the Southeast and France

People looking to move out of London

Working closer with Visit Kent

THREATS

Empty town centre with development of St James

Continued central government reduction in council funding

Individuals or organisations, who refuse to cooperate/collaborate

Competition from other areas, eg Thanet

Possible lack of understanding of level of tourism offer needed

Lack of investment

Perception of Dover as transit town

Immigrant situation in Calais

Smaller attractions not keeping up with the times

Uncertainty over border controls caused by Brexit negotiations

This SWOT analysis was drawn from the Coastal Communities document, Sue Jones' Destination Management Hierarchy document and the Industry workshop)

Disclaimer

The information and analysis in this document is provided by Tourism Works and its subcontractors in good faith. It is based on information elicited from the Client, mutually agreed individuals and businesses in the tourism sector, and existing reports and research.

The achievement of any recommendations will depend on factors outside of our control.

DOVER BIG LOCAL

Creating change
in the heart of Dover