

White Cliffs Country Factsheet

The Experiential Offer – Opportunities & Gaps

September 2020



The following factsheet will review:

- ✓ Key trends that resonate with the Dover, Sandwich and Deal offer
- ✓ Area product strengths & opportunities
- ✓ Building on the current White Cliffs Country product
- ✓ White Cliffs Country specific
 - ✓ Opportunities & examples
 - ✓ Gaps & considerations
- ✓ Opportunities offered by the NDW & Kent Downs AONB
- ✓ Experience product snapshot grid highlighting seasonal opportunities

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Key trends that resonate with the White Cliffs Country offer

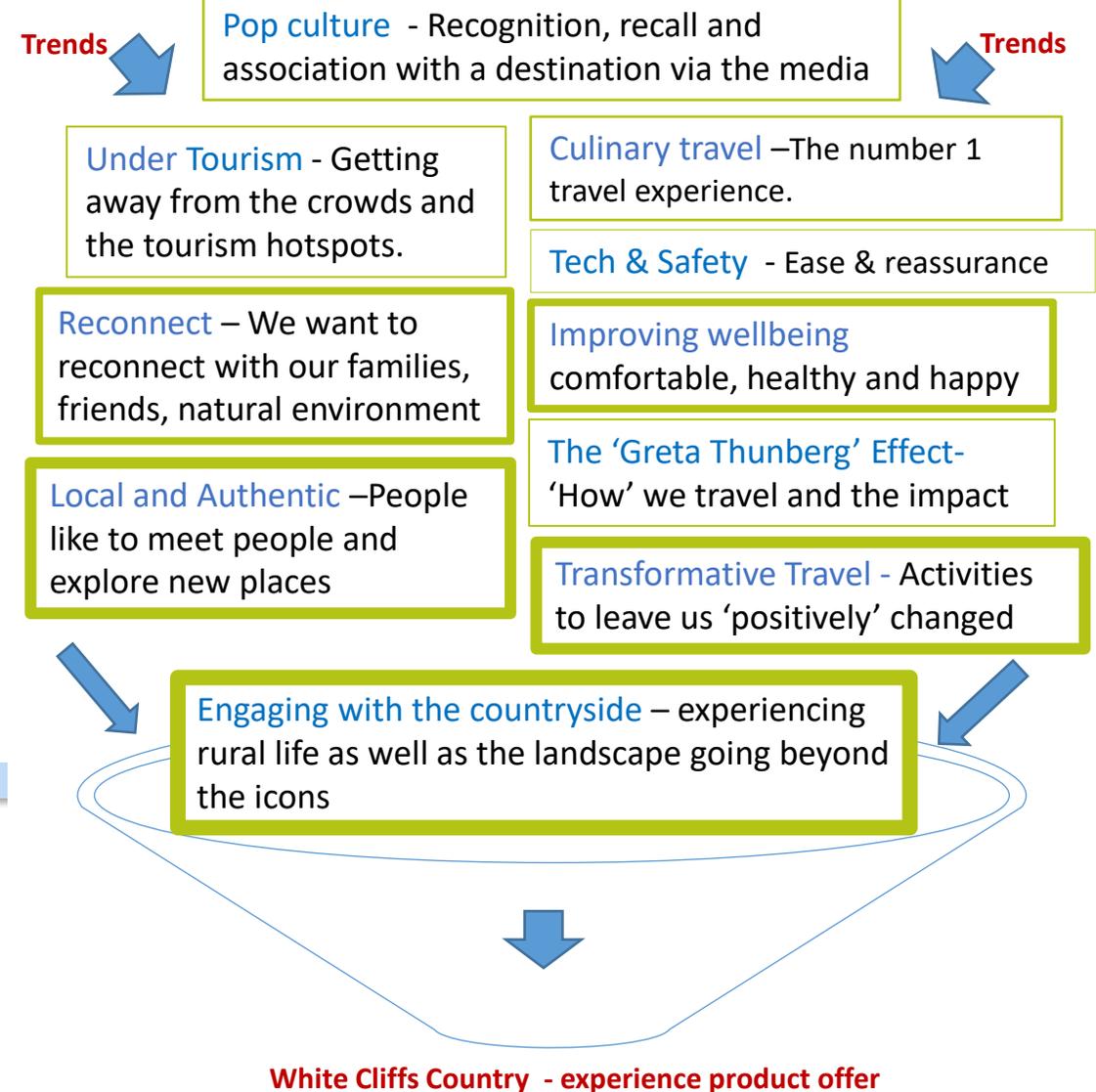
The White Cliffs have long held the iconic status of England’s ‘welcome home’ image, insuring the area’s inclusion on multiple coach day trips from London. However, dwell time for these groups is short, delivering lower than desired economic return and leaving much of the district undiscovered. The rich built and natural heritage across Dover, Deal and Sandwich aligned to the landscape of the North Downs, offers the perfect product to develop engaging travel experiences.

From recent research we already know that:

- ✓ **BOOK IN ADVANCE** - When booking an experience, 65% of the domestic market book before leaving home.
- ✓ **WILL TRAVEL UP TO 1 HOUR** - Approximately 80% of domestic customers looking to book an experience are more than prepared to travel up to an hour, any longer and the % drops dramatically.
- ✓ **EXPERIENCES INFLUENCE DESTINATION CHOICE** - Nearly 60% of the domestic market are influenced by an experience when selecting a destination

Extensive research undertaken as part of the Discover England Fund highlights that the top 4 outdoor activities include an additional interest beyond the actual landscape or walking and cycling activity. This emphasises the importance of developing a layered product

OTHER ACTIVITIES PURSUED ON HOLIDAY TO ENGLAND INVOLVING OUTDOOR ACTIVITY

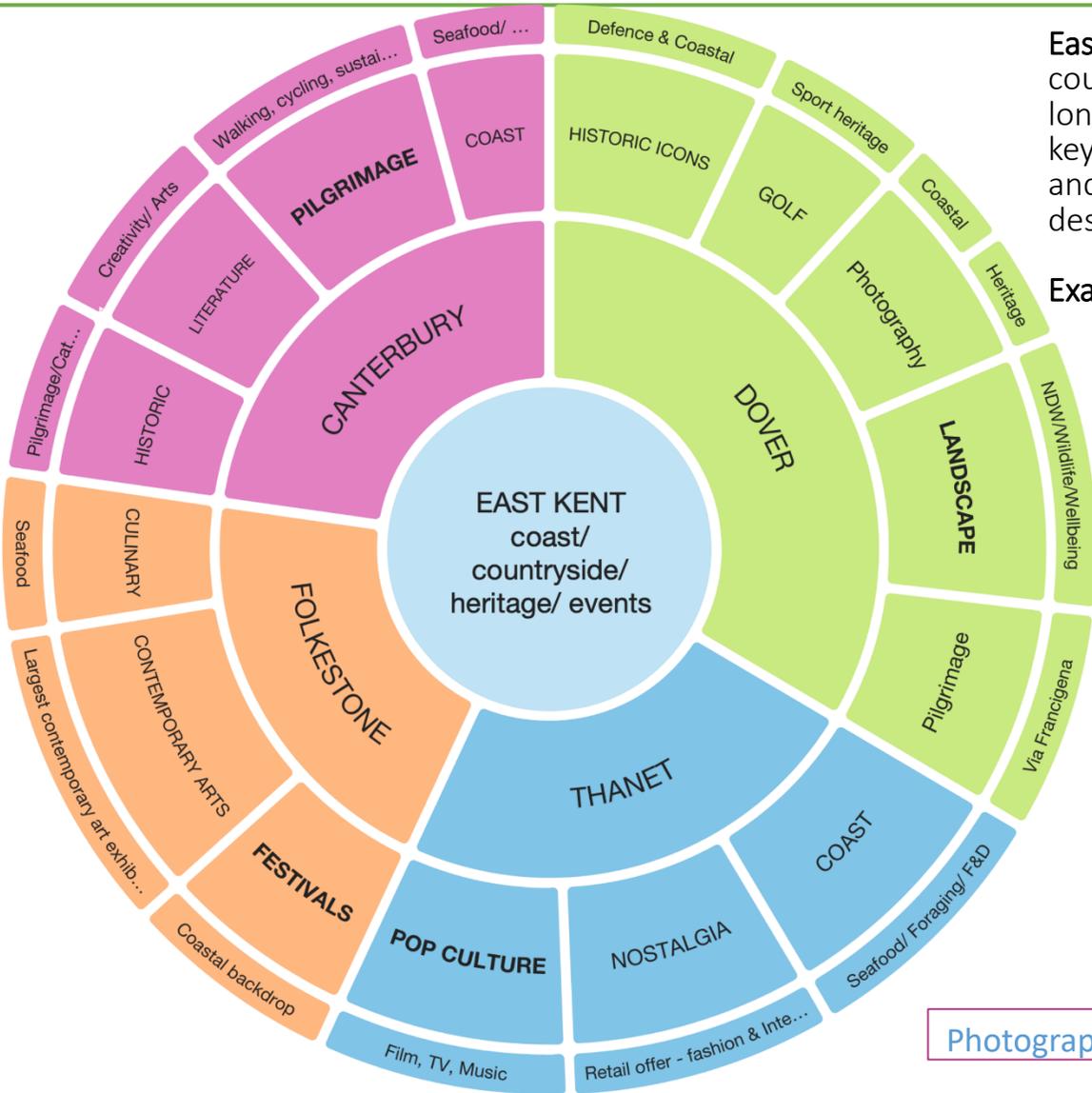




Strengths & opportunities for East Kent & White Cliffs Country

East Kent has an established product offer built around the coastal, heritage and countryside appeal, but it's dominated by icons. Because this recognition and recall of long-standing product such as Canterbury Cathedral & the White Cliffs is so strong, other key areas have often had to fight to be heard. Getting visitors to step into the countryside and surrounding towns is crucial for Dover to switch from a castle and cliffs stop-off destination to an enriched short break offer.

Examples of East Kent opportunities:



Landscape & Nature

- Off the beaten track tours/ discover nature
- Visitor engagement with the nature and conservation offer (Gen Z, Families etc..)
- Walking, Cycling – rivers/ country parks

The Great Outdoors

- Walking and cycling as a lead or component product
- Getting closer to nature- seal watching to fossils
- Activities - golf, kite surfing, sand yachting, surfing
- Wellbeing, transformative and pilgrimage

Closer to the coast /Seafood– engaging more with the seasons and the sea

- Catch, cook, eat, learn, care
- Beaches & coastline
- Heritage towns, coastal defence

Photography

- Stunning light/ sunsets
- Iconic coast – geological/ historical/ industrial



Building on the current White Cliffs Country product

Landscape – As one of the most iconic British images, the White Cliffs have become a ‘tick off list’ pit stop for visitors and groups. The opportunity here is 2-fold; To work with local enthusiasts to offer walking tour experiences to incorporate unique views and other points of interest via platforms such as Airbnb Ex. Working with group operators to potentially incorporate some of the environmental and heritage management messages into their tours, to raise visitor awareness of biodiversity, wildlife and sensitivities.

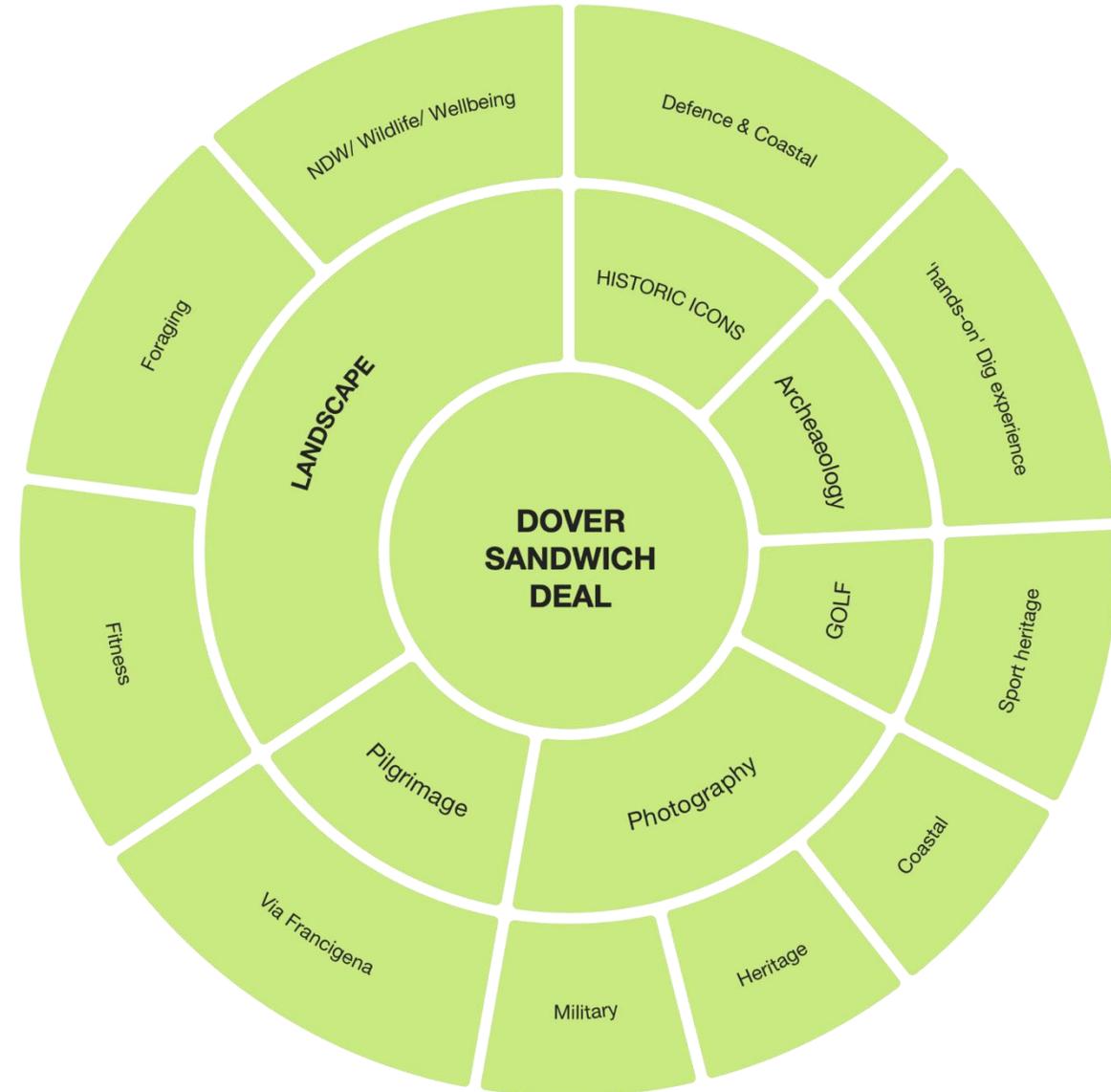
Getting more from the coast – organised experiences to get the visitors away from hot spot areas on the white cliffs to engage with the wider coastal/ countryside offer - combine other interests such as fitness foraging and photography.

Bringing heritage alive – Building on the current walking tour offer by getting this product onto bookable platforms. At present approx. 20% of walking tours are booked before arrival, this could significantly support the planned dwell time in Deal and Sandwich for day/ short break visitors. Archaeology experiences offer an opportunity to generate revenue for local societies.

Transformative and wellbeing focus: the **new pilgrimage** to find yourself and to reconnect using the resource of the NDW/ Via Francigena.

Golf – Extending the product beyond the major events is crucial for Sandwich. As Kent’s premier golf destination there is an opportunity for the town to be used as a golfing base for operators looking to develop a multi course experience package.

Strengthened and enhanced via a sustainable commitment





White Cliffs Country – Experience product opportunities

Dover, Sandwich, Deal: Product Strengths: Golf, Heritage, Iconic Natural Heritage, Coast,

| Experience | Lead Opportunity underutilised at present | Product example |
|---------------------------|---|--|
| Archaeology | Although Dover is dominated by one of the largest castles in England, its wealth of archaeological heritage remains a bit of a hidden gem. Building on the uniqueness of the bronze age boat discovery in 1992, there are a plethora of significant sites around the town that could offer the potential for the Dover Museum and the Archaeological Trust, to collectively package an opportunity for visitors to get involved by offering dig day experiences or museum behind the scenes days covering restoration projects. | Dig Ventures offers the opportunity for wannabe archaeologists to study and learn first-hand on one of their courses or by joining one of their experiences on a real dig. www.Digventures.com |
| Golf plus | Although the actual course proposition is strong, as with other high profile golf locations, there can sometimes be a disconnect with how local businesses both capitalise and develop their offer to align to strong appeal of the game. This is an opportunity for accommodation and hospitality providers, encouraging a greater economic return to the local community. | www.visitscotland.com not only for the way they present the golf offer, but how they place it into both a historical, cultural and environmental context for the destination. https://www.visitscotland.com/see-do/active/golf/ https://www.theexperiencestandrews.com/view-our-experiences.aspx |
| Getting close to Nature | The coastal and countryside offer is a strength, however there is still a clear opportunity to increase visitor engagement in a sustainable and managed way. At present the White cliffs countryside project offers a range of experiences aimed at all family members – however these predominantly target the local community rather than attracting visitors. | www.nationaltrust.com The National Trust coastal areas attract 1000s of visitors each year – but to engage them with the trusts conservation message they offer bookable courses e.g. Blean Beach, Somerset |
| Combination walking tours | Both Sandwich and Deal offer layers of history, good quality dining and rail access, making them the perfect destinations for historical food safaris. This combination, of walking, talking, eating and drinking is a fantastic way to introduce visitors to the local history while delivering a wider benefit to the local economy. | Great example walking tour format in Canterbury and York, but also for a smaller scale example at St. Peters village tours in Broadstairs and the Rotten Ramsgate Tours |
| Pilgrimage | Although Canterbury is seen as the main Kent pilgrimage destination - the Canterbury to Dover section of the North Downs Way also comprises the initial section of the Via Francigena. (The Canterbury to Rome Pilgrimage route) – A short section that could easily be packaged. Adding additional layers of experience, such as mindfulness walks, walking with different animals and historical walks increases the appeal. | The Camino de Santiago – walking the last 100k. Airbnb SW Coast Path experiences 3-4 hours walking with lunch. |
| Coastal Photography | Photography is an East Kent wide opportunity, but due to the iconic status of the white cliffs and the environmental sensitivities around their management access isn't always easy. Photographic opportunities from sea safaris as well as from other key vantage points like Samphire Hoe create new experiences around a currently popular attraction. This offers a great way to capitalise on the iconic popularity while introducing visitors to other areas. The other notable area for photographic opportunities are military/ industrial sites. | Paul Reiffer Photographer runs exclusive luxury workshops on the Jurassic coast which is all inclusive £££ - luxury/ top end experience. Both of the following run coastal courses www.paulreiffer.com www.melvinnicholsonphotography.com |



White Cliffs Country Product Priorities – Opportunities & Gaps

Core District Themes :Dover, Sandwich, Deal

| | Primary Themes | Gaps analysis for selected themes |
|---------------------------|----------------------|--|
| Dover Sandwich Deal | Landscape and nature | <p>The recent survey conducted by Natural England to monitor engagement with the natural environment (Sept 2019) highlighted, that the number one engagement with green spaces was via the urban park.</p> <p>Urban parks are easy, accessible and convenient, however, their experience scored low on positive outcomes (the way they made people feel). The areas that scored high on emotional outcomes were; Mountains/ Hills, Woodland / forests and Farmland. Therefore, the data indicates that the consumer has a high desire to engage with the natural landscape and nature yet perceives it to be difficult. To overcome these hurdles/ plug the gap, experience led activities that take visitors into the countryside would start to dispel these concerns. E.g. ‘Walking the Farm’ farm visits are often based in the farmyard location, however it’s the confidence to get out into the farmland where visitors need the reassurance, this can also be linked to the Kent Connected app to assist and educate visitors safely. Exploring the coast, getting away from the tourist beach and taking a closer look at the coastal wildlife with a guide.</p> <p>A way in which visitors can be encouraged back into the countryside is by combining the experience with another one of their passions, for example:-</p> <ul style="list-style-type: none"> a.) Foodies turned foragers - Moving the love affair they have with the plate to a new relationship with the plants. b.) Fitness – Trading in the Dumbbells for the Downs and the fitness class for the foreshore. c.) Stop scrolling and start shooting – Instagram has made wannabe photographers of us all, but how, when and where we can access the perfect shot is often a best kept secret. d.) And Breathe... - Focusing on the value of the landscape for wellbeing – walking, cycling, nature safaris or just taking in the view. <p>All of these experiences are linked by the fact that you need to get out into the landscape and experience the benefits of the surrounding natural environment... issues over uncertainty and safety can be overcome by joining a group/ having a guide.</p> |



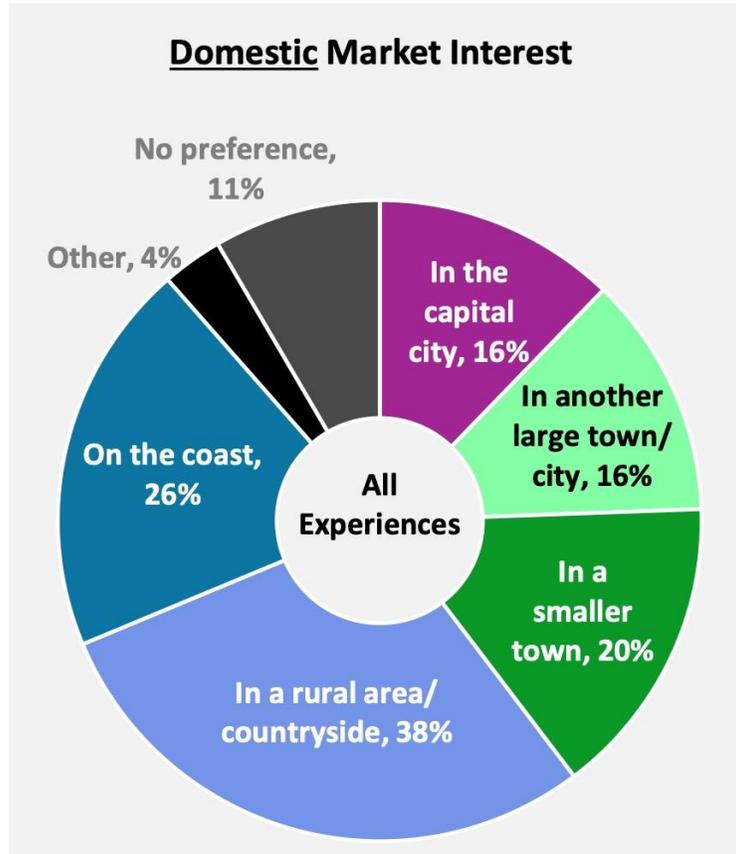
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Landscape & Nature

The Value of the North Downs Product

Rural assets are often underutilised when they are in close proximity to major heritage attractions.... The consumer/ group tour operator focuses their visit on the iconic attractions, which often leads to the dilemma of high footfall and low spend which isn't sustainable.

The Dover District section of the North Downs Way /Kent Downs AONB landscape offers a great extension to the core heritage offer. In addition the alignment of the NDW with the Via Francigena creates the perfect theme to capitalise on the trend of transformative travel. Product developed into 1-2 hour experiences could also potentially tap into the day excursion market from the cruise port.



- ❖ The Discover England Experiences research (June 2019) highlights the potential to develop product in the rural area, capturing the following insights for shaping new experiences:
- ❖ There is a high interest in engaging with a rural product for the domestic audience with 39% stating their preference for the countryside, rural area. International preference was less, however is still represented 29%.
- ❖ Both Domestic and International visitors highlighted journey time to an experience was a factor with 85% willing to travel up to 1 hour, any longer saw a dramatic drop.

They want the experience to be:

- ✓ Authentic & Unique
- ✓ Create a distinctive memory
- ✓ Deliver cultural or historical immersion
- ✓ Provide a challenge that they don't have access to at home

The North Downs Way & Kent Downs AONB deliver against all these consumer requirements. Accessible in less than 30 minutes journey time; offering an authentic rural and historical experience that complements the iconic heritage offer and encourages extension of stay.

White Cliffs Country Challenge

- High volume day visitor market targeting set locations
- Port of entry discourages visitor dwell time in the immediate location
- Low dwell time/ spend per head
- Environmental sensitivity of key sites

Dover District needs it's visitors to:

- Stay longer & spend more
- Disperse from port of entry and key iconic attractions
- Visit out of core season

Tapping into current trends

- Transformative & wellbeing experiences
- Under tourism – visitors wanting to get away from the hot spots
- Sustainability appeal for Gen Z re transport, once in destination
- Bubble booking – offering an experience that can appeal to multiple family members



Opportunity



The added value of the North Downs:

- Pilgrims Way/ North Downs Way is an established product
- Adaptation of the pilgrimage product to incentivise visitors to complete a section of the route
- Accessibility via public transport; the appeal of rural life
- Proximity to cruise terminal to offer an instant access experience to the British countryside
- This product can be self guided or guide led
- This product delivers across the full sustainable filter

What makes a good walking experience?

- ✓ Landscape/ views/ architectural vistas
- ✓ Historical or cultural insight often delivered as insider knowledge
- ✓ A chance to relax, unwind and recharge – linking to the well-being and mindfulness trend.

Engaging the visitor with the landscape

Experience products: E.g. Food & Drink – Hidden Heritage – Literary – Agricultural tours – Pilgrimage – Wellness

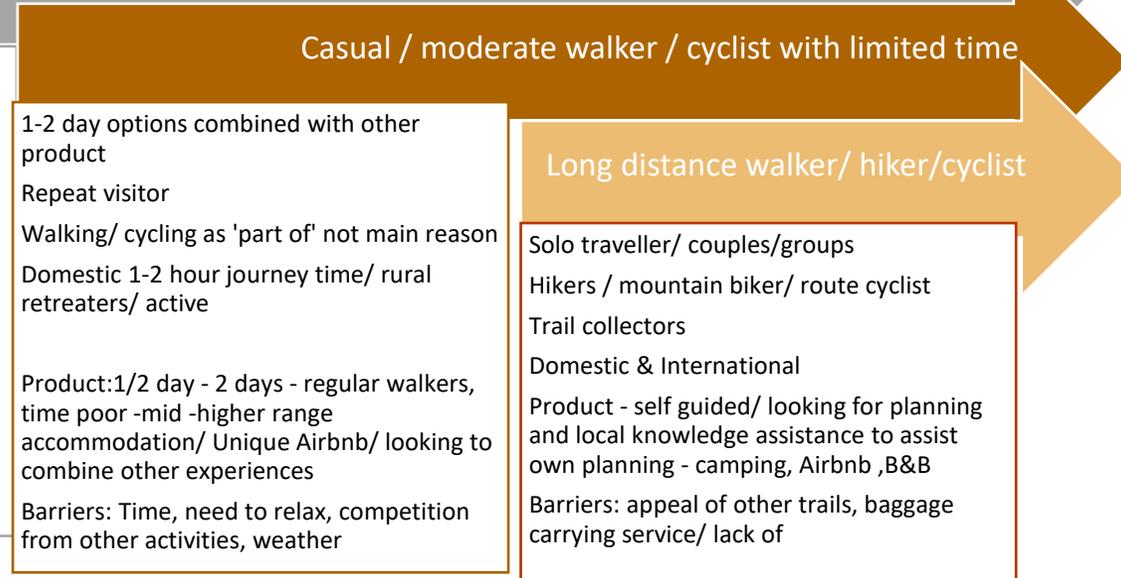
How do visitors engage with the countryside?

Engaging with the North Downs Way/ AONB Walking / Cycling/Nature

Local
Day visitor
Leisure walker/ group tour
Families
outdoor activity is not the main reason for travel
Local/ Domestic/ group international

Product; 1-2 hours walking combined with other attractions - often circular routes to car park with other products

Barriers: Concern about getting lost, accessing the countryside, weather



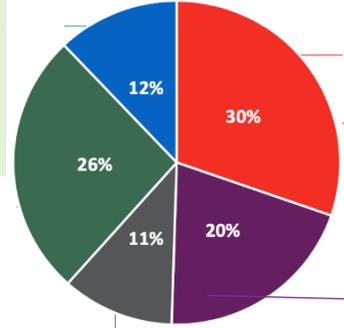
Example experience –
Dover cliffs comparison encouraging visitors to walk from iconic tourist attraction



HILL & NATURE WALK ~ DISCOVER REAL EDINBURGH WITH A LOCAL EXPERT!

Who are the lead segments?

The countryside appeals across all VisitEngland segments, due to the White Cliffs iconic status all segments would engage, however the best prospects to extend a cliff visit to a wider experience are 1&2.



1. COUNTRY-LOVING TRADITIONALISTS

Empty nesters with traditional values, they are likely to have recently taken a countryside break in England. Good quality, secure accommodation is a priority when booking a holiday.

2. FUN IN THE SUN

Typically parents looking for family-orientated summer holidays where beaches play a starring role. Tend to seek cheaper, more 'social' alternatives to hotel accommodation, such as caravans or holiday camps.

At one with nature As a result of lockdown, interest and awareness of the UK's natural environment has increased. The 2020 series of Spring Watch, hit viewing figures of over 8 million per episode. This new found interest coupled with a desire to reengage with the countryside offers a great opportunity to develop experiences to bring people back to landscapes that they are familiar with, but do not know. The key is grabbing their attention via more than one interest, and how to overcome barriers and concerns over getting lost and access

Appendix 1

Kent/Lead District Snapshot - Strength, Opportunity and Gap analysis

– Experience led product only

Please note: This is not a definitive list of the county's tourism product, each district factsheet will have a more in-depth product snapshot.

Strength (S) – The product is already established but could be more experiential/ season lengthened

Opportunity (O) – There is an opportunity to develop this product to raise the profile of the area through experience

Gap for development (G) – There is a consumer interest and potential for the destination to showcase this product

Seasonality Key for product delivery (Actual and Potential)

| | |
|-------------|--|
| High | Potential for high product delivery in this quarter – This product may not be currently delivering in this month |
| Med | Potential for Medium level product delivery in this quarter due to - weather, product, availability of local support |
| Low | Low product delivery in this quarter due to – Reliance on weather, volunteer base, product availability |

| Product Grid | Kent (All) | Kent Downs AONB | White Cliffs Country NDW/AONB | Folkestone & Hythe District | Canterbury NDW/ AONB | Thanet | Ashford NDW/AONB | Tun Wells | Gravesham NDW/AONB | Medway | Seasonality | | | | |
|----------------------------|------------|-----------------|-------------------------------|-----------------------------|----------------------|--------|------------------|-----------|--------------------|--------|-------------|------------|-------------|-----------|--|
| | | | | | | | | | | | Jan - Mar | Apr - June | July - Sept | Oct - Dec | |
| Golf | O | | S/O | O | | | O | | | | | | | | |
| Hidden Heritage | S | S/O | O | O/S | S/O | O | S | S | S/O | S/O | | | | | |
| Archaeology | O | | O/G | | O/G | | | | | O | | | | | |
| Gardens/ Gardening Courses | S/O | O | | O | | | O | S | O | | | | | | |
| Fossil Hunting | O | | O | O/S | O | O | | | | | | | | | |
| Military heritage | O | | S | S | | | O | | S/O | S | | | | | |

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|-------------------|------------|-----------------|-------------------------------|-----------------------------|----------------------|--------|------------------|-----------|--------------------|--------|-------------|------------|-------------|-----------|
| | | | | | | | | | | | Jan - Mar | Apr - June | July - Sept | Oct - Dec |
| Wildlife | O | S | S/O | S/O | S/O | O | O | O | O | O | | | | |
| Walking & Cycling | S/O | S | O/G | O/G | O/G | O | S/O | O/G | O/G | O/G | | | | |
| Water sports | O | O | O | O | O | O | | | | | | | | |
| Food & Drink | S | S/O | O | S/O | S | O | S/O | O | O/G | O | | | | |
| Multicultural | O | G | O | O | O | O | O | | S/O | O | | | | |
| Foraging | O | S/O | O | O | O | O | O | O | O | | | | | |
| Pilgrimage | O | S/O | S/O | | S/O | | O | | O | O | | | | |
| Photography | O/G | S/O | O/G | O/G | O/G | O/G | O | O | O | O | | | | |
| Agriculture | | S/O | S/O | S/O | S/O | O | S | S | O | | | | | |
| Vineyards | S/O | O | O | O | O | | S | O | O | | | | | |
| Theatre/ Music | O | | O | S/O | S/O | S/O | | S/O | | O | | | | |
| Creative courses | O | O | O | S/O/G | O | S/O/G | O | O | O | O | | | | |

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|---------------------------|------------|-----------------|-------------------------------|-----------------------------|----------------------|--------|------------------|-----------|--------------------|--------|-------------|------------|-------------|-----------|
| | | | | | | | | | | | Jan - Mar | Apr - June | July - Sept | Oct - Dec |
| Art tours | O | | | S/O/G | | O | | | | O | | | | |
| Lux escapes | O | | | S/O | O | | O | O | | | | | | |
| Wellbeing | O | S/O | O | O | O | O | O | S/O | O | O | | | | |
| Maritime | S/O | | O | O | O | | | | S | S | | | | |
| Seafood | O | | O | S/O | O | O | | | | | | | | |
| Outdoor pursuits | | | O | O/S | O | S/O | | | | | | | | |
| Events | S/O | | O | S/O | S/O | S/O/G | O | O | O | S/O | | | | |
| Markets | O | | | | O | | O | O | O | O | | | | |
| Retro culture | O | | O | O | O | S | | | | O | | | | |
| Pop Culture | O | | | O | | O | | | O | O | | | | |
| Screen tours | O | | O | O | O/G | O/G | O | | | S/O | | | | |
| Fishing | O | | O | O | O | O | | | | | | | | |
| Cooking | O | O | O | S/O | O | O | S/O | O | O | O | | | | |
| Family/ small group focus | | | O | O | S/O | S | O | O | O | O | | | | |
| Bespoke tours | S | O | O | O | O | O | O | O | O | O | | | | |

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