

[REDACTED]

---

**From:**

**Sent:**

[REDACTED]  
14 January 2021 17:33

**To:**

**Cc:**

**Subject:**

[REDACTED]; [REDACTED]  
Re: Draft Economic Strategy for our Local Plan - CONFIDENTIAL AND URGENT

Hi [REDACTED]

Many thanks including us within plan.

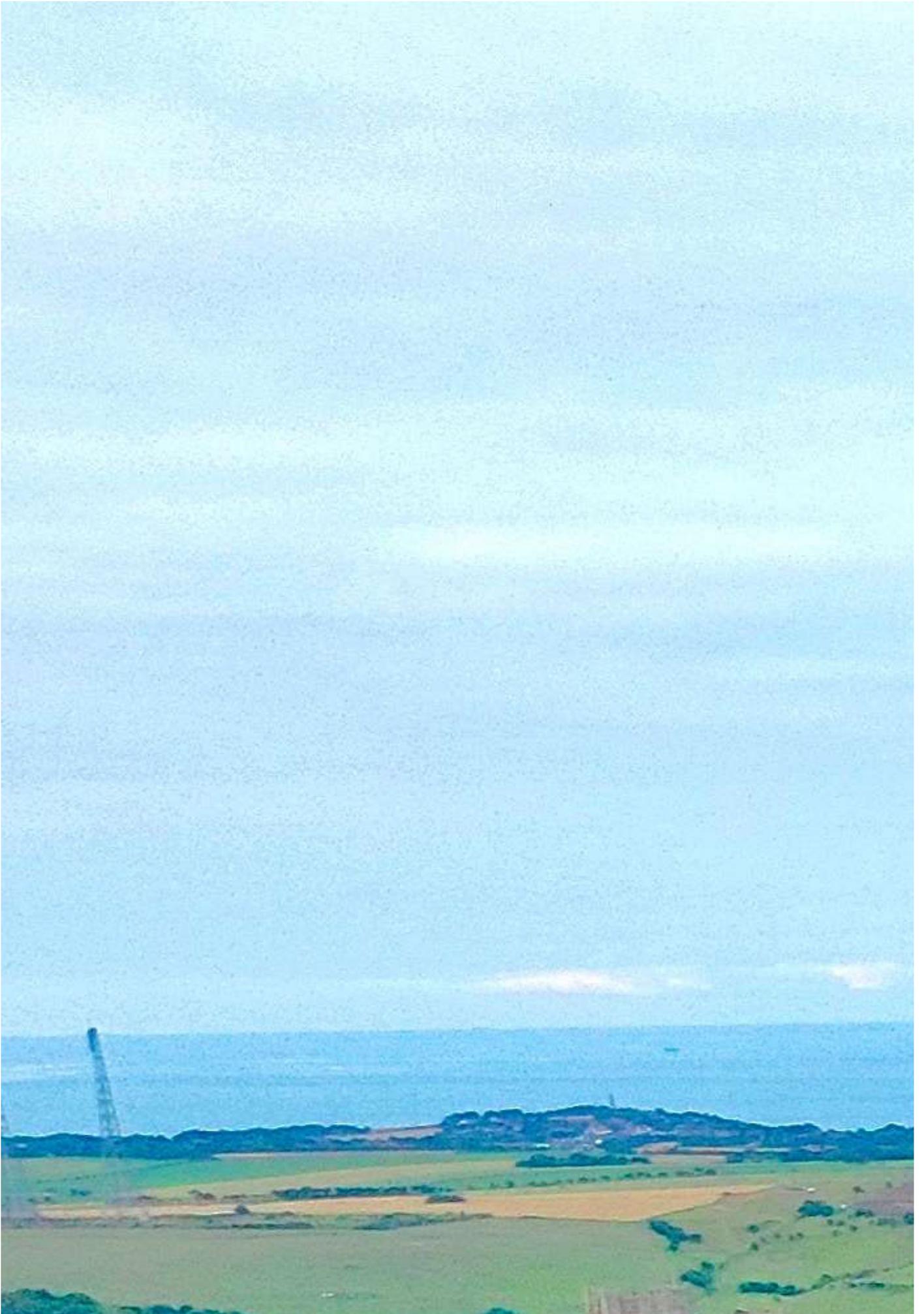
Please see attached two high res photos of the site that you can choose from.

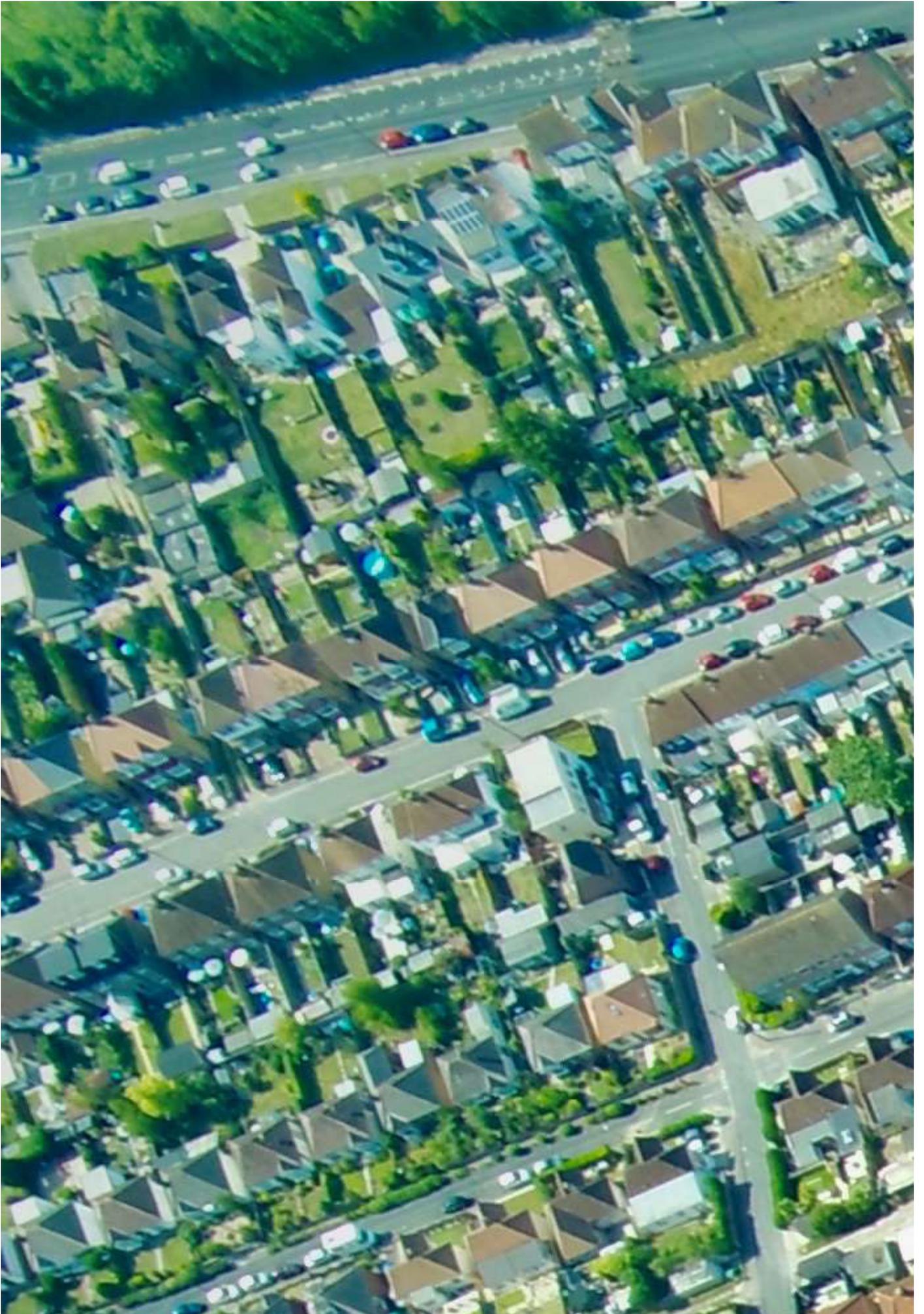
Also, would it be possible to amend the wording slightly to;

“Work to enable the development of TechFort at Western Heights into a cutting edge and world renowned innovation campus to support the creation of a mixed use ecosystem of start ups and early stage technology firms with complimentary facilities and amenities.”

Do let me know if you require anything else

Kind regards,





On Thu, 14 Jan 2021 at 11:10 am, [REDACTED]@dover.gov.uk> wrote:

[REDACTED]  
We are preparing the final draft of the above, as shown in confidence, for publication next week....

## Target activities:

1. Work to enable the **development of TechFort** at Western Heights into a cutting-edge and world-renowned innovation campus to support the creation of an ecosystem of start-ups and early-stage technology firms.
2. Work with Southeastern and Network Rail to secure **an "under-the-hour" service on High Speed 1** between Dover and London, with potential for further enhancements through additional future rolling stock and improved car parking provision at Dover Priory.
3. Continue to support and lobby for the **dualling of the A2** from Lydden to Dover Eastern Docks and improvements of **Brenley Corner**.
4. Through the Dover District Local Plan, **bring forward new high-quality employment and housing sites** to secure investment, and measures to support the upgrading and renewal of existing employment areas and supporting infrastructure.
5. Work with local partners, including Dover Technical College, to **develop skills and training programmes** linked to new sectors and investments in Dover District.

We've incorporated Techfort....

Need a high resolution best photo that we could drop in the document with a two line caption to go with it.

Can you help by return please.

Apologies for the tight turnaround..

Thanks,

[REDACTED]



[Redacted]

**Head of Inward Investment and Tourism**

Dover District Council

Council Offices, White Cliffs Business Park, Dover CT16 3PJ

**Please note that my normal working days are Monday, Tuesday and Thursday.**

**Mob:** [Redacted]

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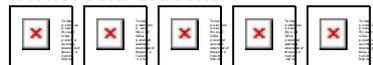
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[Redacted]  
CEO & Founder, TechFort

[Redacted] [Redacted]  
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[REDACTED]

---

**From:**

**Sent:**

[REDACTED]  
14 January 2021 19:46

**To:**

**Cc:**

**Subject:**

[REDACTED]; [REDACTED]  
Re: Draft Economic Strategy for our Local Plan - CONFIDENTIAL AND URGENT

[REDACTED] - apologies, I just noticed a typo, it should be *complementary* uses (as in interdependence) not complimentary;

"Work to enable the development of TechFort at Western Heights into a cutting edge and world renowned innovation campus to support the creation of a mixed use ecosystem of start ups and early stage technology firms with complementary facilities and amenities."

Many thanks,

On Thu, 14 Jan 2021 at 5:32 pm, [REDACTED] > wrote:

Hi [REDACTED]

Many thanks including us within plan.

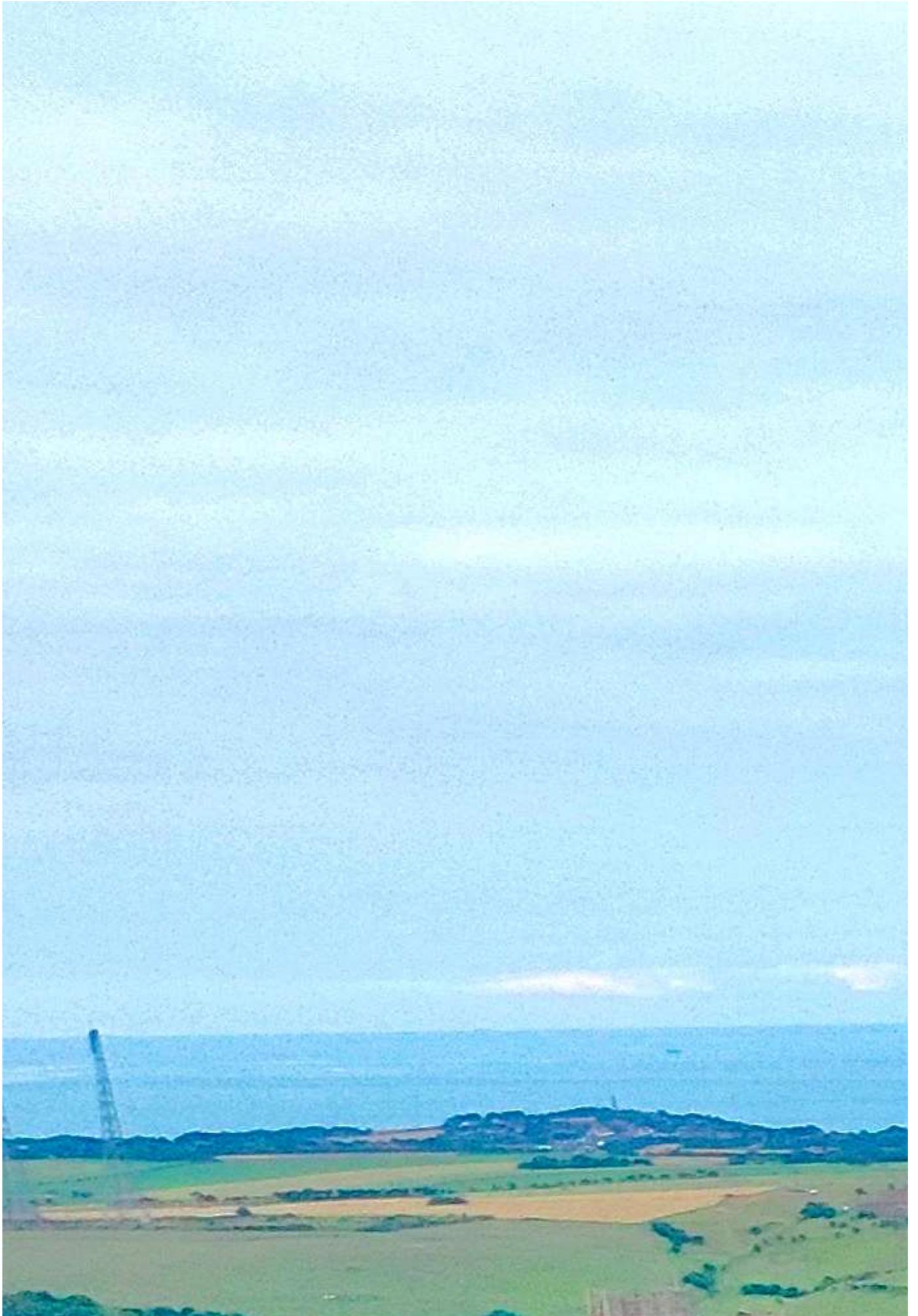
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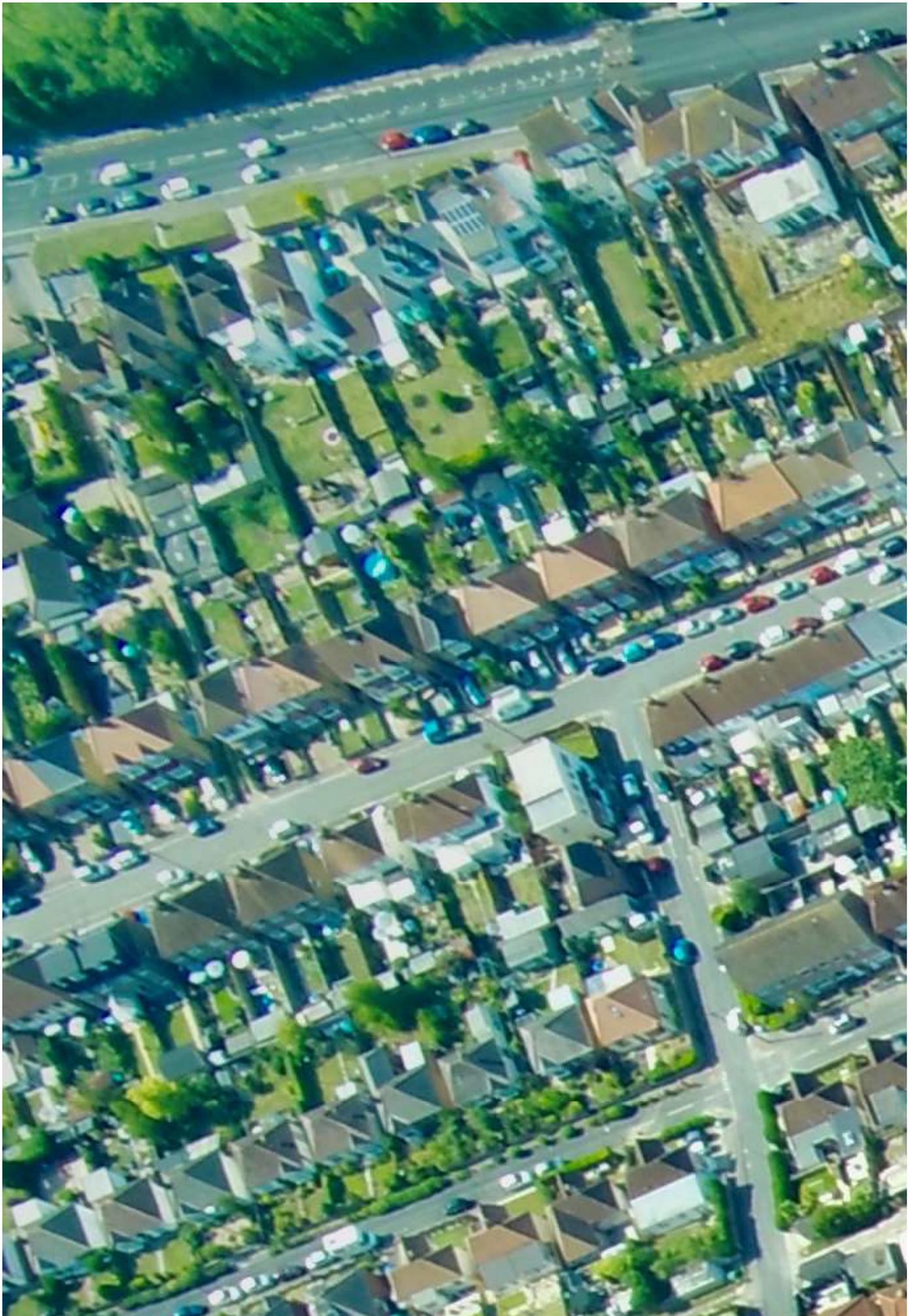
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[REDACTED]  
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## Target activities:

1. Work to enable the **development of TechFort** at Western Heights into a cutting-edge and world-renowned innovation campus to support the creation of an ecosystem of start-ups and early-stage technology firms.
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Can you help by return please.

Apologies for the tight turnaround..

Thanks,

[REDACTED]



[Redacted]

**Head of Inward Investment and Tourism**

Dover District Council

Council Offices, White Cliffs Business Park, Dover CT16 3PJ

**Please note that my normal working days are Monday, Tuesday and Thursday.**

**Mob:** [Redacted]

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[Redacted]  
CEO & Founder, TechFort  
[Redacted] [Redacted]  
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CEO & Founder, TechFort

+ ██████████ ██████████  
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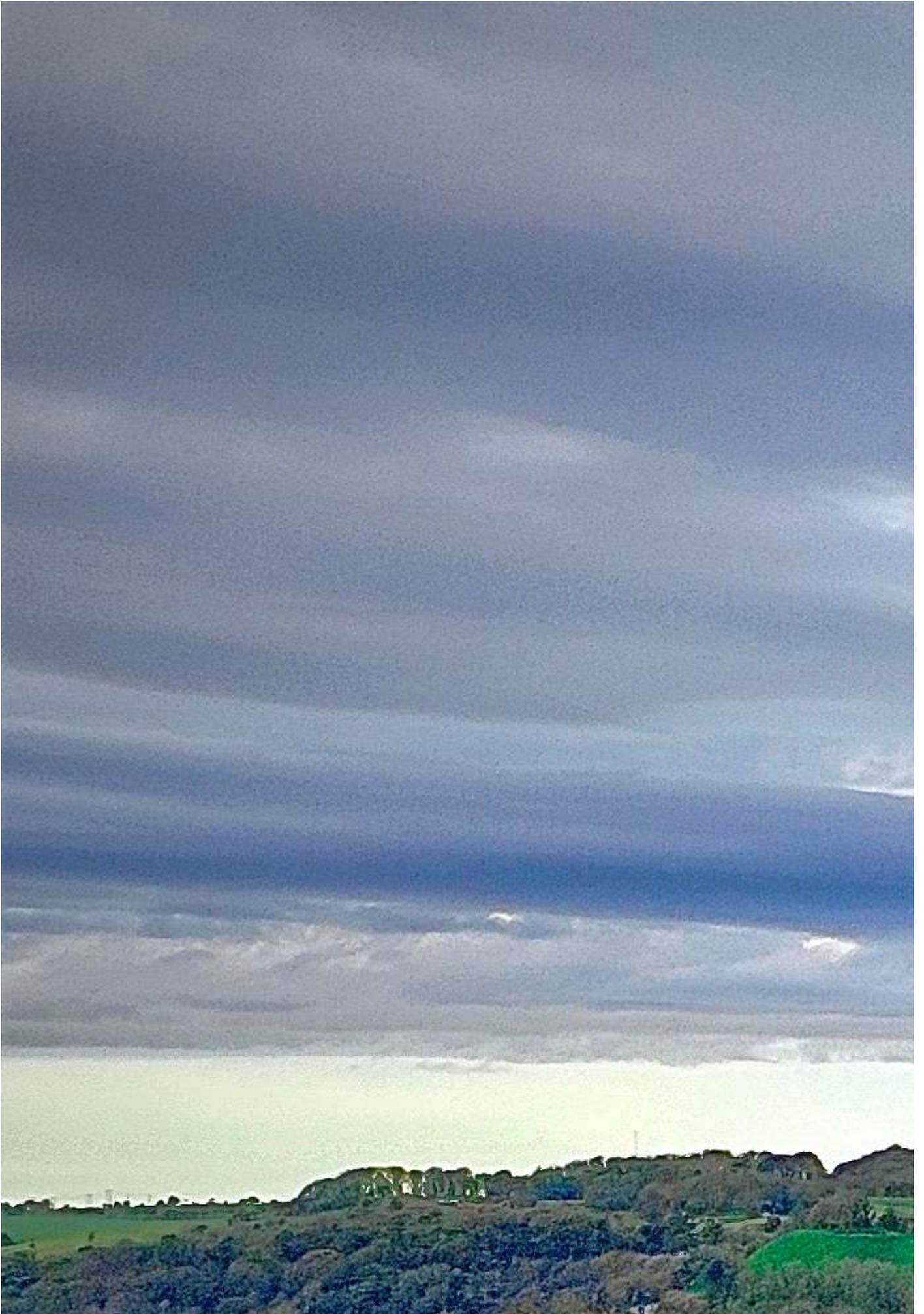
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**From:** [REDACTED]  
**Sent:** 15 January 2021 10:04  
**To:** [REDACTED]  
**Cc:** [REDACTED]  
**Subject:** Re: Virgin Cruise Liner

Good morning [REDACTED]

Please see attached, feel free to use

Regards,  
[REDACTED]



On Fri, 15 Jan 2021 at 9:56 am, [REDACTED] > wrote:

[REDACTED]

Good morning.

We are trying to source a shot of the above, one that has the cliffs and Castle in the backdrop, from the Port.

It occurs to me that you may have one that you could share and send to [REDACTED] cc'd.

Many thanks,

[REDACTED]



[REDACTED]

**Head of Inward Investment and Tourism**

Dover District Council

Council Offices, White Cliffs Business Park, Dover CT16 3PJ

**Please note that my normal working days are Monday, Tuesday and Thursday.**

**Mob:** [REDACTED]

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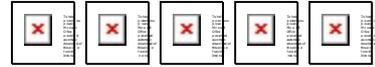
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[REDACTED]  
CEO & Founder, TechFort

[REDACTED] [REDACTED]  
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[REDACTED]

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**From:** [REDACTED]  
**Sent:** 18 January 2021 17:37  
**To:** [REDACTED]  
**Cc:** [REDACTED]  
**Subject:** RE: Virgin Cruise Liner

Hi [REDACTED]

I hope you are well and sorry to bother you.

We are very keen to use your photo of the Virgin Cruise Liner, but are struggling to make it work within portrait parameters. Do you have another version of the image, with the Virgin Cruise Liner, Dover, White Cliffs and Castle that may work as a portrait?

Thank you, as ever, for your continued help and support.

All the best,

[REDACTED]



[REDACTED]  
**Strategic Tourism & Visitor Economy Manager**  
Dover District Council  
Council Offices, White Cliffs Business Park, Whitfield, Dover CT16 3PJ  
Tel: [REDACTED]  
Mob: [REDACTED]  
Email: [REDACTED]  
Web: <http://Dover.gov.uk>  
Web: <https://WhiteCliffsCountry.org.uk>

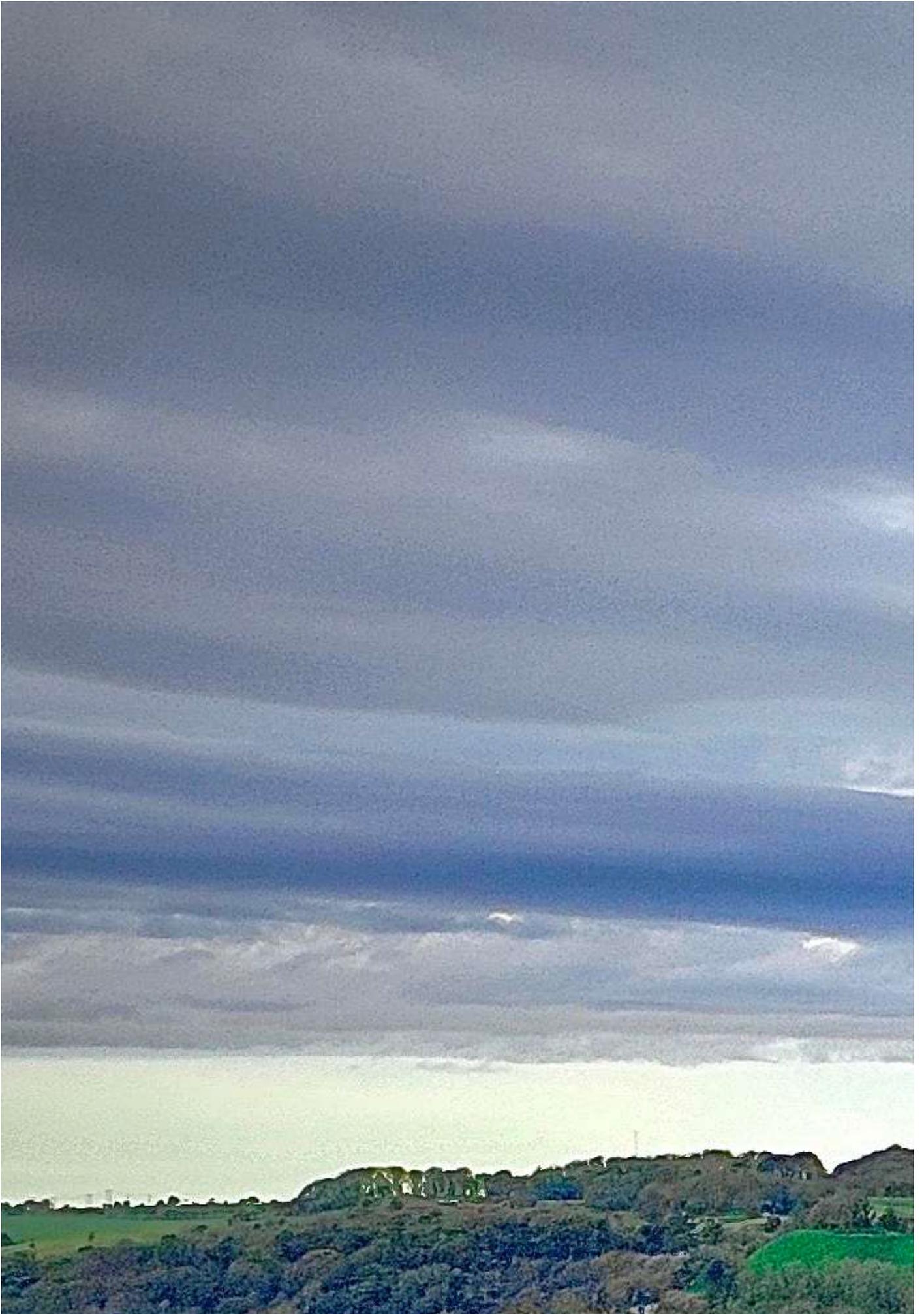
**From:** [REDACTED]  
**Sent:** 15 January 2021 10:04  
**To:** [REDACTED]  
**Cc:** [REDACTED]  
**Subject:** Re: Virgin Cruise Liner

Good morning [REDACTED]

Please see attached, feel free to use

Regards,

[REDACTED]



On Fri, 15 Jan 2021 at 9:56 am, [REDACTED]@dover.gov.uk> wrote:

[REDACTED]

Good morning.

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It occurs to me that you may have one that you could share and send to [REDACTED] cc'd.

Many thanks,

[REDACTED]



[REDACTED]

**Head of Inward Investment and Tourism**

Dover District Council

Council Offices, White Cliffs Business Park, Dover CT16 3PJ

**Please note that my normal working days are Monday, Tuesday and Thursday.**

**Mob:** [REDACTED]

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CEO & Founder, TechFort

+ ██████████ ██████████

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**From:** [REDACTED]  
**Sent:** 19 January 2021 09:12  
**To:** [REDACTED]  
**Cc:** [REDACTED]  
**Subject:** Re: Virgin Cruise Liner

Hi [REDACTED]

I hope all is well.

I went through my archives this morning and unfortunately that was the only still photo I took as I was using the drone to film so all the content is in 16x9 aspect ratio so even if I was able to pull a still frame it would still be in landscape. Perhaps the best solution would be to crop in on the photo?

Kind regards,  
[REDACTED]



[REDACTED]  
CEO & Founder, TechFort

[REDACTED] | [REDACTED]  
[www.TechFort.com](http://www.TechFort.com)



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On Mon, 18 Jan 2021 at 17:36, [REDACTED] <[\[REDACTED\]@dover.gov.uk](mailto:[REDACTED]@dover.gov.uk)> wrote:

Hi [REDACTED]

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We are very keen to use your photo of the Virgin Cruise Liner, but are struggling to make it work within portrait parameters. Do you have another version of the image, with the Virgin Cruise Liner, Dover, White Cliffs and Castle that may work as a portrait?

Thank you, as ever, for your continued help and support.

All the best,  
[REDACTED]

[REDACTED]  
**Strategic Tourism & Visitor Economy Manager**

Dover District Council

Council Offices, White Cliffs Business Park, Whitfield, Dover CT16 3PJ



Tel: [REDACTED]  
Mob: [REDACTED]  
Email: [REDACTED]  
Web: <http://Dover.gov.uk>

Web: <https://WhiteCliffsCountry.org.uk>

**From:** [REDACTED]  
**Sent:** 15 January 2021 10:04  
**To:** [REDACTED] [@DOVER.GOV.UK](mailto:[REDACTED]@DOVER.GOV.UK)>  
**Cc:** [REDACTED] [@DOVER.GOV.UK](mailto:[REDACTED]@DOVER.GOV.UK)>  
**Subject:** Re: Virgin Cruise Liner

Good morning [REDACTED]

Please see attached, feel free to use

Regards,

[REDACTED]



On Fri, 15 Jan 2021 at 9:56 am, [REDACTED] [@dover.gov.uk](mailto:[REDACTED]@dover.gov.uk)> wrote:

[REDACTED]

Good morning.

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It occurs to me that you may have one that you could share and send to [REDACTED] cc'd.

Many thanks,

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[REDACTED]  
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Dover District Council

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[REDACTED]  
CEO & Founder, TechFort

[REDACTED] [REDACTED]  
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CEO & Founder, TechFort  
[Redacted] [Redacted]  
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[REDACTED]

---

**From:** [REDACTED]  
**Sent:** 25 August 2021 12:07  
**To:** [REDACTED]  
**Cc:** [REDACTED]  
**Subject:** Re: FW: Princes's Foundation workshop of Western Heights

Dear [REDACTED]

Thank you for your prompt response this morning and I note your diary issues at such short notice.

Given the logistics I have already encountered in arranging for four separate parties to find a date when they could each be persuaded to come down to Dover for the whole day, maybe it's better if I can ask you to provide clear days for the council's attendance from 1 October so that these can then be offered to the other parties not least the Prince's Foundation and their lead director.

I look forward to hearing from you

Best regards

[REDACTED]

On Wed, 25 Aug 2021 at 9:49 am, [REDACTED] wrote:

Hi [REDACTED]

I'm picking up your email thread regarding the proposed workshop.

Whilst we're keen to move this forward at pace, having checked the diaries of those who need to be involved from DDC, regrettably neither date suggested is possible. Can we look at alternatives in early October? Do you want to suggest a couple of dates?

Best regards

[REDACTED]

[REDACTED]

**Strategic Director (Operations & Commercial)**

---

**From:** [REDACTED] >

**Sent:** 24 August 2021 12:20

**To:** [REDACTED]

**Subject:** Princes's Foundation workshop of Western Heights

Dear [redacted] dear [redacted] dear [redacted]

Workshop with Western Heights Stakeholders.

I am pleased to report that the Prince's Foundation can hold their workshop to formulate components for a coherent and economically literate regeneration of the entire Western Heights. The dates offered by the PF are Monday 20th or Wednesday 29th September.

Can you please indicate your availability for either date.

So that as many stakeholders as relevantly possible can be included in the workshop, can you please let me know of any recommendations you might wish to make.

Thank you and looking forward to confirmation of dates.

Kind regards,

[redacted]

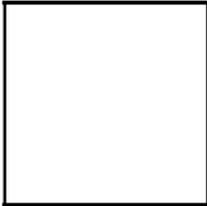


[redacted]

CEO & Founder, TechFort

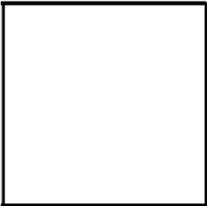
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**David de Min**  
CEO & Founder, TechFort  
+4477 666 80070 | [david@techfort.com](mailto:david@techfort.com)  
[www.TechFort.com](http://www.TechFort.com)



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[REDACTED]

---

**From:** [REDACTED]  
**Sent:** 27 December 2021 11:04  
**To:** [REDACTED]  
**Cc:** [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]; [REDACTED]  
**Subject:** Re: Western Heights, Dover

Hi [REDACTED]

Many thanks for your email. I'd like to confirm my support for the approach you've suggested below. We believe this is the only way forward to deliver a comprehensive and deliverable scheme on the Western Heights.

Please do suggest some dates early next year and we look forward to progressing this exciting opportunity.

Kind regards,  
[REDACTED]

On Wed, 22 Dec 2021 at 12:47 pm, [REDACTED] <[\[REDACTED\]@doover.gov.uk](mailto:[REDACTED]@doover.gov.uk)> wrote:

Hi [REDACTED]

I'm writing further to the conversations over recent months regarding the potential offered by the Western Heights in Dover recognising that changes in ownership over significant parts of the site have brought new impetus to releasing the regeneration opportunities offered by this extensive site, whilst at the same time improving access to the significant heritage interests.

Following on from the email exchanges a couple of months ago, I'm therefore keen for the Council to facilitate a discussion between landowners as to how we might best encourage development of the Western Heights and would like to convene a meeting of the key landowners to discuss how we might develop a memorandum of agreement between us, as a first step in taking forward and delivering a comprehensive plan for the site, building on the existing planning policies contained within the Dover Western Heights Supplementary Planning Document (SPD), produced in 2015.

I acknowledge that we had initially looked to hold this discussion in November, but I hope you'll understand that it made sense to delay for a few weeks so that we had some clarity regarding the Council's Levelling Up Fund bid and also recognising the pressures on staff within the planning team at a key time in the Local Plan process.

If you could confirm your support and co-operation for this approach, I'll now try to set a date early in the new year so that we can move this forward with pace.

Best regards

[REDACTED]

[REDACTED]

**Strategic Director (Operations & Commercial)**



Dover District Council, Council Offices, White Cliffs Business Park, Dover, CT16 3PJ.

Tel: [REDACTED]

Mob: [REDACTED]

Fax: 01304 872240

Email: [REDACTED]

Web: [www.dover.gov.uk](http://www.dover.gov.uk)

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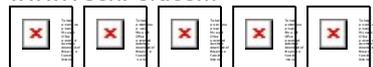
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[REDACTED]  
CEO & Founder, TechFort

[REDACTED] [REDACTED]  
www.TechFort.com



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[REDACTED]

---

**From:** [REDACTED]

**Sent:** 24 January 2022 14:29

**Cc:** [REDACTED]

**Subject:** Re: **\*\*TEAMS\*\*** A Vision for TechFort and the Western Heights



[REDACTED]  
CEO & Founder, TechFort

+ [REDACTED] | [REDACTED]

[www.TechFort.com](http://www.TechFort.com)



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On Mon, 24 Jan 2022 at 14:02, [REDACTED] <[\[REDACTED\]@dover.gov.uk](mailto:[REDACTED]@dover.gov.uk)> wrote:

**TEAMS LINK:** [REDACTED]

[REDACTED]

Note: [REDACTED] has asked for a meeting to be in held in the council chamber to discuss the Vision for TechFort and the Western Heights to include delivery of a presentation from [REDACTED] of Techfort.

Disclaimer: this meeting will be in person unless guidance changes, at which point we will update this invitation and hold the meeting virtually through TEAMS.

We hope you can all make it.

Many kind regards, [REDACTED] (on behalf of [REDACTED])



[REDACTED]  
**PA to the Heads of Service**

Dover District Council  
Council Offices, White Cliffs Business Park, Whitfield, Dover CT16 3PJ  
Tel: [REDACTED]

Int Ext: [REDACTED]  
Email: [REDACTED]  
Web: <http://dover.gov.uk>

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Microsoft Teams meeting

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[Redacted]

**From:** [Redacted] >  
**Sent:** 04 March 2022 15:04  
**To:** [Redacted]  
**Subject:** Western Heights Dover - Meeting of Landowners Session

Dear [Redacted]  
Many thanks for organising the workshop yesterday. It was helpful to understand the ambitions of the other land owners.  
To confirm the Citadel position we are delighted to work with [Redacted] and scope the masterplan exercise. We want to see a land owners cooperation agreement that delivers and funds an agreed overarching Western Heights transport and heritage integrated plan. TechFort will co fund this exercise and makes its advisors available to assist in this exercise.  
We will also continue to develop a “stand alone” detailed development plan for the Citadel. I look forward to hearing from [Redacted] next week to scope this exercise.

Many thanks again,  
[Redacted]

[Redacted]  
CEO & Founder, TechFort  
[Redacted]  
[www.TechFort.com](http://www.TechFort.com)  
[Redacted] [Redacted] [Redacted] [Redacted] [Redacted]

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[Redacted]

**From:**  
**Sent:**  
**To:**

[Redacted]

04 March 2022 15:04

[Redacted]

**Subject:**

Western Heights Dover - Meeting of Landowners Session

Dear [Redacted]

Many thanks for organising the workshop yesterday. It was helpful to understand the ambitions of the other land owners.

To confirm the Citadel position we are delighted to work with [Redacted] and scope the masterplan exercise. We want to see a land owners cooperation agreement that delivers and funds an agreed overarching Western Heights transport and heritage integrated plan. TechFort will co fund this exercise and makes its advisors available to assist in this exercise.

We will also continue to develop a “stand alone” detailed development plan for the Citadel.

I look forward to hearing from [Redacted] next week to scope this exercise.

Many thanks again,

[Redacted]



[Redacted]  
CEO & Founder, TechFort  
[Redacted] | [Redacted]  
[www.TechFort.com](http://www.TechFort.com)  
[Broken image icons]

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[Redacted]

**From:** [Redacted]  
**Sent:** 12 March 2022 14:11  
**To:** [Redacted]; [Redacted]  
**Subject:** Western Heights Process  
**Attachments:** Methodology flowchartv2.pdf

Dear [Redacted] and [Redacted]

[Redacted] has kindly sent me a high level flow diagram of how we can get from where we are now to a cooperation agreement in 3 months. This will then enable the council or a SPV to submit for placemaking grants and LUF in particular. I think it would be helpful if we asked [Redacted] to come down to Dover in the next couple of weeks and talk us through this so that we can then scope the exercise properly. I say this because I am now being asked to let my heritage adviser get involved which I am very happy to do, provided we get some project management and deliverables in place first.

[Redacted] has done this successfully before at Greenwich, Ebbsfleet, Islington on large scale projects and I'm sure Dover can also benefit from his advice. He was hugely helpful to me in the negotiations with the Ministry of Justice in 2020.

Please let me know if we can do this as I think it's needed to move the process smoothly forward. If you agree, I will ask [Redacted] what dates he has available. We'll only need a few hours with him.

I look forward to hearing from you.

Kind regards,

[Redacted]

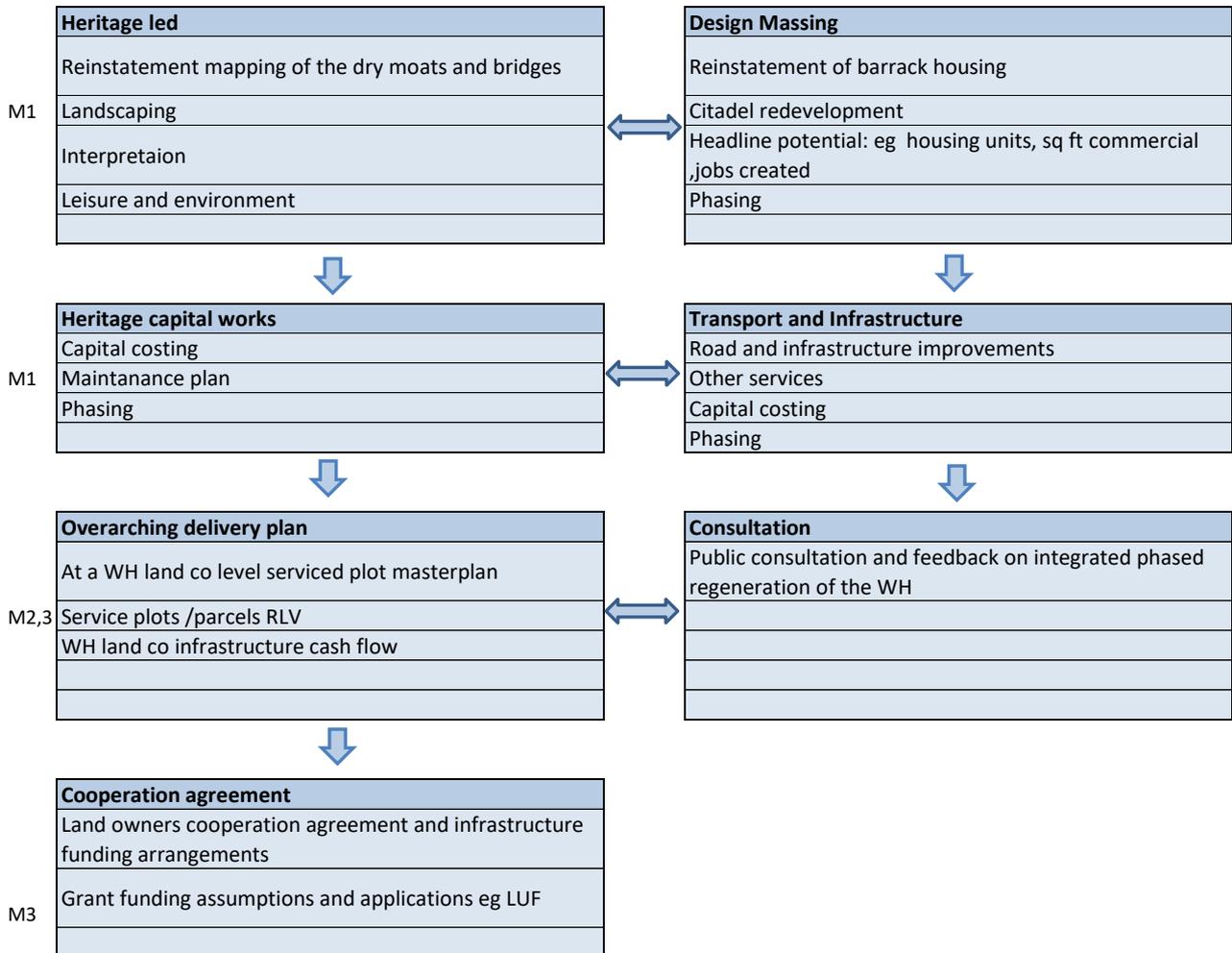


[Redacted]  
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+ [Redacted] [Redacted]  
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[REDACTED]

---

**From:** [REDACTED]  
**Sent:** 16 March 2022 17:50  
**To:** [REDACTED]  
**Cc:** [REDACTED]  
**Subject:** Fwd: Western Heights Process  
**Attachments:** Methodology flowchartv2.pdf

[REDACTED] [REDACTED]

I haven't had a response to my email below. However I had a meeting today with Historic England regarding the casements phase 1 for the Citadel. They repeated the need for an overarching heritage strategy for the whole of the Western Heights and without this it will be a barrier to future support from HE. As we have pointed out this all needs to be properly scoped and I would welcome a discussion with the council to ensure this happens over the next few months.

I look forward to hearing from you soonest.

Kind regards,  
[REDACTED]

----- Forwarded message -----

**From:** [REDACTED]  
**Date:** Sat, 12 Mar 2022 at 2:10 pm  
**Subject:** Western Heights Process  
**To:** [REDACTED] <[\[REDACTED\]@dover.gov.uk](mailto:[REDACTED]@dover.gov.uk)>, [REDACTED]  
[REDACTED] <[\[REDACTED\]@dover.gov.uk](mailto:[REDACTED]@dover.gov.uk)>

Dear [REDACTED] and [REDACTED]

[REDACTED] has kindly sent me a high level flow diagram of how we can get from where we are now to a cooperation agreement in 3 months. This will then enable the council or a SPV to submit for placemaking grants and LUF in particular. I think it would be helpful if we asked Stephen to come down to Dover in the next couple of weeks and talk us through this so that we can then scope the exercise properly. I say this because I am now being asked to let my heritage adviser get involved which I am very happy to do, provided we get some project management and deliverables in place first.

[REDACTED] has done this successfully before at Greenwich, Ebbsfleet, Islington on large scale projects and I'm sure Dover can also benefit from his advice. He was hugely helpful to me in the negotiations with the Ministry of Justice in 2020.

Please let me know if we can do this as I think it's needed to move the process smoothly forward. If you agree, I will ask [REDACTED] what dates he has available. We'll only need a few hours with him.

I look forward to hearing from you.

Kind regards,



  
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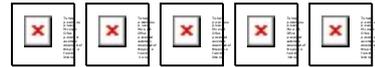
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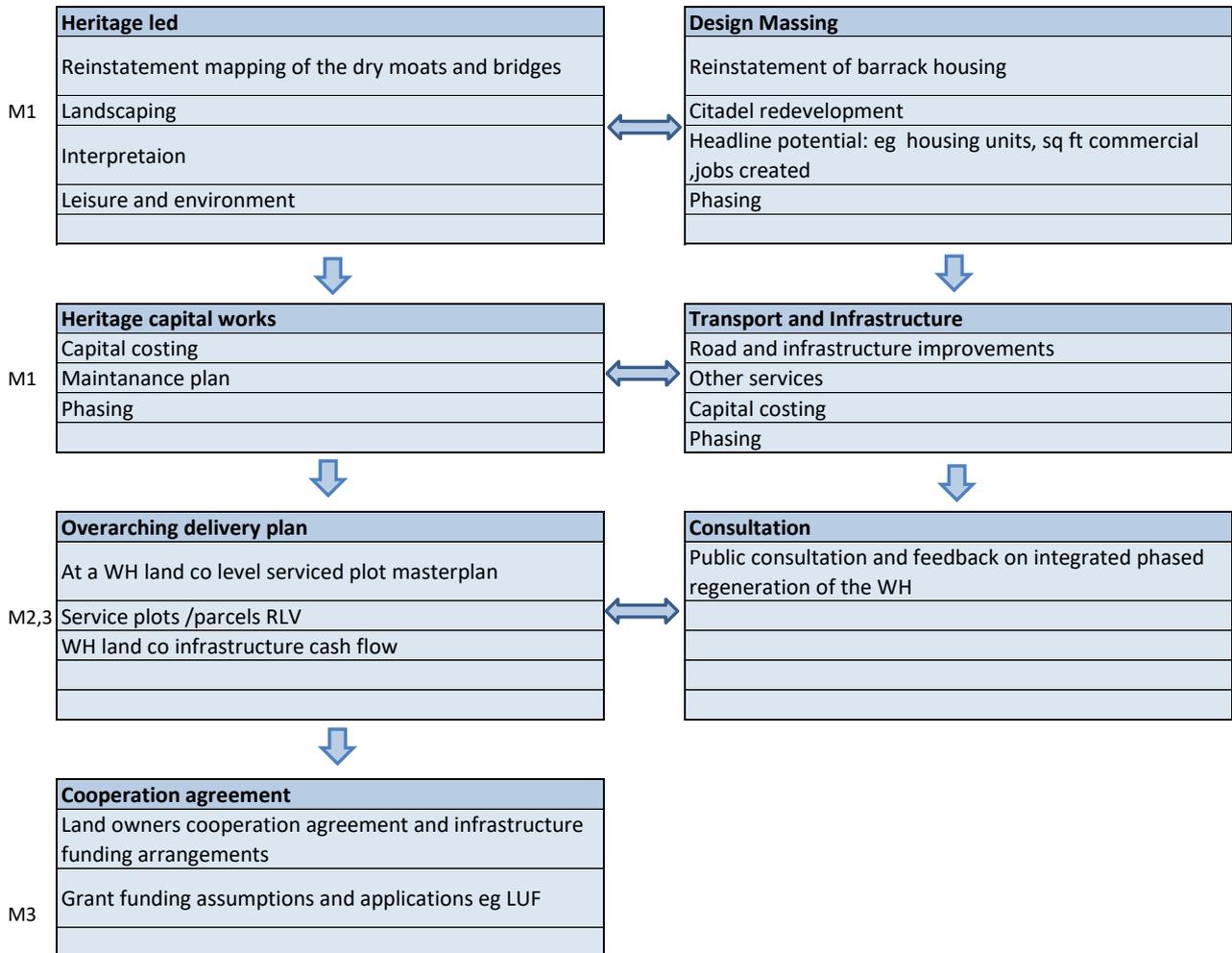


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**From:** [REDACTED]  
**Sent:** 21 March 2022 10:28  
**To:** [REDACTED]  
**Subject:** Western Heights - Meeting, Discussion & Options

Hi [REDACTED] - looking forward to speaking at 11. Can you pls send the link to [REDACTED] who will be joining us who's working on the vision with us

Thanks  
[REDACTED]

**Western Heights - Meeting, Discussion & Options**  
Scheduled: 21 Mar 2022 at 11:00 am to 12:00 pm, GMT  
Location: Microsoft Teams Meeting  
Invitees: [REDACTED], [REDACTED], [REDACTED]



[REDACTED]  
CEO & Founder, TechFort

+ [REDACTED] | [REDACTED]  
[www.TechFort.com](http://www.TechFort.com)



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[Redacted]

**From:** [Redacted]  
**Sent:** 21 March 2022 10:37  
**To:** [Redacted]  
**Subject:** RE: Western Heights - Meeting, Discussion & Options

No problem – all done. See you soon.

All the best,

[Redacted]

---

**From:** [Redacted]  
**Sent:** 21 March 2022 10:28  
**To:** [Redacted]  
**Subject:** Western Heights - Meeting, Discussion & Options

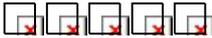
Hi [Redacted] - looking forward to speaking at 11. Can you pls send the link to [Redacted] who will be joining us who's working on the vision with us

[Redacted]

Thanks

[Redacted]

**Western Heights - Meeting, Discussion & Options**  
Scheduled: 21 Mar 2022 at 11:00 am to 12:00 pm, GMT  
Location: Microsoft Teams Meeting  
Invitees: [Redacted], [Redacted], [Redacted]

 [Redacted]  
CEO & Founder, TechFort  
[Redacted] | [Redacted]  
[www.TechFort.com](http://www.TechFort.com)  


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**From:** [REDACTED]  
**Sent:** 21 March 2022 13:13  
**To:** [REDACTED]  
**Subject:** Various Strategies, Plans, Information and Documents - DDC  
**Attachments:** Visit Kent Cruise Partnership Passenger Research Report v1 - White Cliffs Country.pdf

Hi all,

Thank you for your time this morning.

As discussed, please find below links to various strategies, plans, information and documents – that I think may be of help to us and our thinking.

---

### **Corporate Strategy / Supporting Documents (Dover District Council)**

- Local Plan, new (emerging): [Dover District Local Plan](#) / Core Strategy, current (2010): [Core Strategy \(dover.gov.uk\)](#)
- Corporate Plan (2020): [Corporate Plan \(dover.gov.uk\)](#)
- Tourism & Visitor Economy Strategy (adopted, May 2021): [Tourism Strategy May 2021 update v3 - WEB \(whitecliffscountry.org.uk\)](#)
- Economic Growth Strategy (adopted, December 2021): [Dover Economic Growth Strategy](#)
- Heritage Strategy (2020): [Heritage Strategy \(dover.gov.uk\)](#)
- Climate Change Strategy (2021): [Climate-Change-Strategy-January-2021-web.pdf \(dover.gov.uk\)](#)
  
- Historic England – Historic Places Panel Report (Dover): [Historic Places Panel Review Paper - Dover July 2021 \(historicengland.org.uk\)](#)
- A Cultural Survey & Framework for Dover (2009): [CulturalFrameworkWeb.pdf \(dadonline.uk\)](#)

### **Government Strategy and Other Useful National Supporting Documents**

- Levelling Up White Paper: [Government unveils levelling up plan that will transform UK - GOV.UK \(www.gov.uk\)](#)
- Build Back Better – Plan for Growth: [Build Back Better - our plan for growth \(publishing.service.gov.uk\)](#)
- Industrial Strategy: [Industrial Strategy: building a Britain fit for the future \(web-optimised PDF\) \(publishing.service.gov.uk\)](#)
- Tourism Sector Deal: [Industrial Strategy: tourism sector deal - building a world-class experience economy \(publishing.service.gov.uk\)](#) and the Tourism Recovery Plan ([The Tourism Recovery Plan \(publishing.service.gov.uk\)](#))
  
- National Bus Strategy for England: [Bus Back Better: national bus strategy for England \(publishing.service.gov.uk\)](#)
- National Vision for Cycling and Walking: [Gear change: a bold vision for cycling and walking \(publishing.service.gov.uk\)](#)
- National Railways Plan: [Great British Railways: Williams-Shapps plan for rail - GOV.UK \(www.gov.uk\)](#)
  
- Let's Create 2020-2030 Strategy: [Strategy 2020-2030 | Arts Council England](#) (Dover named as a Priority Place)

- Creative High Streets (SELEP & Arts Council England): [We-Made-That 231 SELEP-Creative-high-streets 220131.pdf \(southeastlep.com\)](#)
- Levelling Up Fund (Round 1): [Levelling Up Fund: prospectus - GOV.UK \(www.gov.uk\)](#) ((Dover Priority Category 1))
- UK Community Renewal Fund: [UK Community Renewal Fund: prospectus - GOV.UK \(www.gov.uk\)](#)
- UK Shared Prosperity Fund: [UK Shared Prosperity Fund: pre-launch guidance - GOV.UK \(www.gov.uk\)](#)
- Arts Council Funding: [Our open funds | Arts Council England](#)
- Historic England Funding: [Grants to fund repair work and research | Historic England](#)

#### **Dover District Summary – Facts & Figures:**

- Facts & Figures: [Dover District Summary](#)
- Dover District Summary; July 2020: [Dover-District-Summary-July-2020-FINAL.pdf](#)
- Authority Monitoring Report 2019/2020: [Authority-Monitoring-Report-2019-20.pdf \(dover.gov.uk\)](#)
- State of the District: [State of the District \(dover.gov.uk\)](#)

#### **Economic Impact of Tourism Data:**

- White Cliffs Country (Dover District): <https://www.whitecliffscountry.org.uk/pdfs/Economic-Impact-of-Tourism-White-Cliffs-Country-Dover-District-2019.pdf>
- Dover town: <https://www.whitecliffscountry.org.uk/pdfs/economic-impact-of-tourism-dover-town-2019.pdf>
- Kent: [economic-impact-of-tourism-kent-2019.pdf \(visitkentbusiness.co.uk\)](#)

#### **Visitor Survey:**

- Dover: <https://www.whitecliffscountry.org.uk/pdfs/dover-visitor-survey.pdf>
- Cruise Partnership Passenger Research: *attached*

#### **Port of Dover – Performance Data etc:**

- [About - Performance - Port of Dover \(doverport.co.uk\)](#)
- Cruise liner passengers (Port-of-Call and Turnaround visitors) – around 130 calls in 2019 to Dover Cruise Port and over 200,000 passengers.
- Ferry - [Ferry - Ferry home - Port of Dover \(doverport.co.uk\)](#)
- Cruise - [Cruise - Cruise Sailings & Destinations From Dover Cruise Terminal - Port of Dover \(doverport.co.uk\)](#)
- Marina - [Marina - Award Winning Marina - Port of Dover \(doverport.co.uk\)](#)
- Dover Western Docks Revival (DWDR) - [About - DWDR - Dover Western Docks Revival - Port of Dover \(doverport.co.uk\)](#)

#### **Please also find below links to a selection of news stories that might also be of interest and of help:**

- [White Cliffs Country Recognised as One of the Best Places in the World to Visit in Lonely Planet's 'Best in Travel' 2022 \(dover.gov.uk\)](#)
- [Kent Property Market Report sees highest rate of growth in house prices in Dover \(investindover.co.uk\)](#)
- [Dover Named as a Priority in the South East as Arts Council England Announces Commitment to 54 Priority Places \(investindover.co.uk\)](#)
- [Green Light for New Homes at Former Connaught Barracks in Dover \(investindover.co.uk\)](#)

- [Dover Secures £3.2m Future High Streets Funding](#) [Dover Secures £3.2m Future High Streets Funding](#)
- [Ground Breaking on Dover's Market Square Revamp / Reinventing Dover's Market Square](#)
- [Rapid Bus Plans Move Into the Fast Lane \(dover.gov.uk\) / KCC confirm electric bus fleet for Dover Fastrack](#)
- [Maison Dieu Repairs Ahead of £9m Lottery Funded Restoration](#) [Maison Dieu Repairs Ahead of £9m Lottery Funded Restoration \(dover.gov.uk\)](#)
- [Dover Priory footbridge and canopy upgrade thanks to £3.5m investment from Network Rail](#) [Dover Priory footbridge and canopy upgrade thanks to £3.5m investment from Network Rail \(investindover.co.uk\)](#)
- [Kearsney Abbey and Russell Gardens Fly the Flag as Two of the Country's Best Parks \(dover.gov.uk\)](#)
- [Tourism Minister Tees Off a Summer Boost for White Cliffs Country \(dover.gov.uk\)](#)
- [Dover is set for the boat to come in | Markets | Property Week](#)

---

If you have any questions or require any further information please feel free to contact me and I will be happy to help.

All the best,



**Head of Investment, Growth & Tourism**

Dover District Council

Council Offices, White Cliffs Business Park, Whitfield, Dover CT16 3PJ

Tel:

Mob:

Email:

Web: <http://Dover.gov.uk>

Web: <https://WhiteCliffsCountry.org.uk>

Web: <https://InvestInDover.co.uk>



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# Visit Kent Cruise Partnership: Cruise Passenger Research 2019





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<a href="#"><u>Findings: All respondents.....</u></a>	<a href="#"><u>9</u></a>
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# Aim and Background

This report presents the main findings from the cruise passenger survey, giving insight into both the port of call and turnaround markets, while establishing recommendations for future activity and support of planned partnership activity.

The Visit Kent Cruise Partnership was formed to help attract more cruise ships to the Port of Dover by developing Kent's product for the cruise market and promoting Kent as a premier cruise destination.

## The partnership aims to:

- Establish Kent and Dover as premier cruise destinations
- Attract more cruise operators to use the Port of Dover
- Increase the number of port calls and length of stay
- Encourage passengers to spend their shore time in Kent
- Increase cruise passenger spend at visitor attractions and destination partners

To further support the work of the partnership, a passenger survey was carried out, which looked to understand the behaviour of passengers and identify how and when their decisions about how they spend their time can be influenced. The survey looked at two types of passengers, as outlined below.

**Port of Call-** Passengers that visit Dover for one day, either joining an organised excursion or choosing to travelling independently. The partnership aims to encourage them to spend their time ashore in Kent and to understand what activities appeal to them.

**Turnaround-** Passengers that either join or depart a cruise at Dover. The partnership would like to encourage them to spend time in Kent either before or after their trip.





## Data collection

- A survey was designed and data was collected via face-to-face interviews conducted at the Port of Dover cruise terminals
- The survey took no longer than 10 minutes to complete and targeted those passengers who were returning or departing from the cruise terminal
- Throughout the survey there were a series of interviewer instructions to follow, with certain questions requiring the respondent to self-select an answer
- The survey also included a mix of both closed and open-ended questions for the respondent to answer

## Limitations

- Surveys were scheduled to take place at certain times to ensure a variety of cruise liners and nationality of passengers were covered. Although, this scheduling was subject to change, due to availability of interviewers.
- Where possible throughout the report, comparisons to the previous cruise passenger research have been made. However, it should be noted that direct comparisons cannot be made as the previous research question structure and sample differs.
- As the results are based on a limited sample, in order to gain a deeper understanding into the behaviour of particular demographics such as age and country of origin further research would need to be conducted with a larger sample size. Therefore, this research can be used as a benchmarking piece, with the possibility to repeat it at a later date and gain a deeper insight into specific areas of interest.





## National context and trends

The cruise market has evolved in recent years, seeing a changing demographic taking to the seas and cruise operators adapting to cater for their needs. This has led to an increased demand for a wider variety of activities to suit different interests. Itineraries and choices of destinations are the main reasons for passengers choosing a cruise, so it is essential that Kent provides a strong offer to attract cruise lines and passengers thought the work of the Visit Kent Cruise partnership and beyond.

According to the CLIA UK and Ireland Cruise Review 2017, **1.9 million** holidaymakers from the UK and Ireland took an ocean cruise in 2016, a **5.6%** increase compared to the previous year, led by worldwide destinations and high levels of service. Alongside this, the number of passengers starting their cruise at home grew in 2016, accounting for **48%** of the market. The review also highlighted the growing trend surrounding passengers booking further in advance, in order to secure the accommodation and departure dates they desire.<sup>1</sup> Consequently, passengers may plan shore excursions and activities in advance, so to encourage them to do so and to stay in the county, informative and inspirational content on things to do needs to be easily accessible and readily available.

Furthermore, looking at some of the wider trends, a report published by CLIA (2019) identified some of the key cruise industry trends for the year ahead. Firstly, it identifies the rise in **'Instagrammable'** cruise travel, giving passengers opportunities to fill their feeds with a range of travel experiences both on board and on land. Alongside this, it strongly expresses the idea of **achievement over experience**, with the notion that travel experiences will go beyond sightseeing and will be more centred on goal-oriented experiences.<sup>2</sup>

Looking at demographic influences, the report also highlights the increasing trend of **multi-generational travel** and the need for particular shore excursions and pre-cruise itineraries to appeal to various ages.<sup>3</sup> The report also specifies that by 2020 **generation z** will be the largest consumer group, even outpacing millennials, with this generation prioritising experience over material items.<sup>2</sup> Moreover, it is important to monitor and react to emerging industry trends, ensuring that Kent's offer to cruise passengers align with these.





**Findings-  
All Respondents**

## All respondents: Sample and Demographics

This section of the report presents the findings from all respondents, which include both port of call and turnaround passengers. Following data collection, the survey had a total sample of 251 respondents, with those travelling on port of call journeys representing 60% of respondents and the remaining 40% being on a turnaround journey (figure 1). In terms of demographics, 58% of all respondents were female and 42% male. Looking at group composition, 57% were travelling in a couple, followed by 21% travelling with family, and the remainder travelling with either friends (18%) or by themselves (4%), as seen in figure 2. Looking at the age profile of all respondents, the largest proportion of respondents (38%) were aged 65 years and over, followed by 26% aged 55-64 years (figure 3).

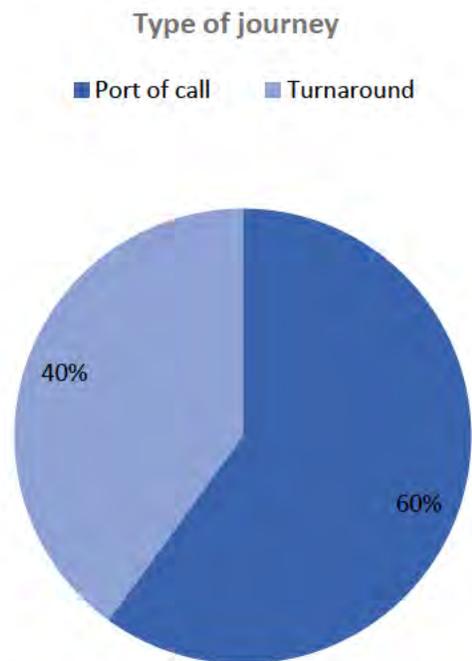


Figure 1: Pie chart to show respondents type of journey

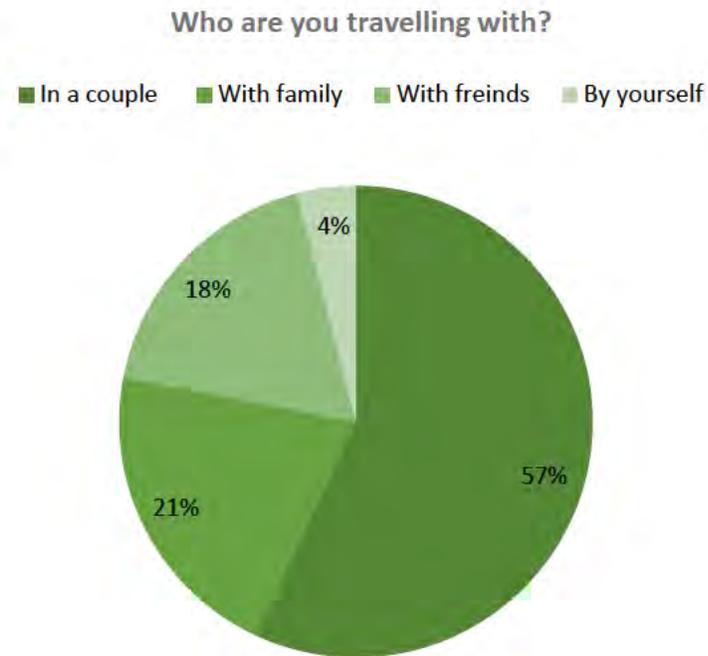


Figure 2: Pie chart to show who respondents were travelling with

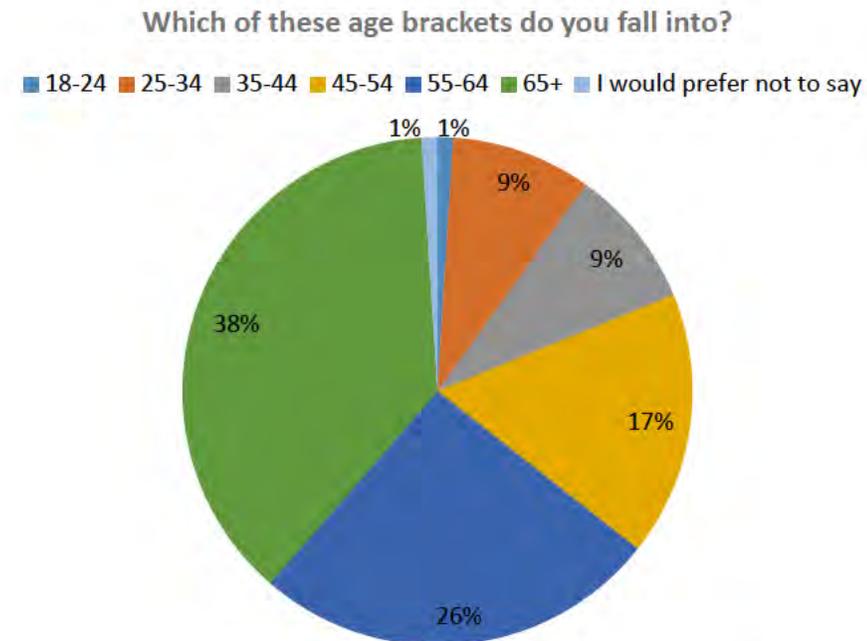


Figure 3: Pie chart to show the age profile of respondents

*Looking at the results of the 2008 survey, the age profile of passengers is similar with the largest proportion being over 50 years of age. Alongside this, those aged over 65 years of age increased slightly from 35% to 38%.*

## All respondents: Sample and Demographics

The survey also looked to ask respondents if they were a UK resident and where they originated from. As seen in figure 4 below, **83%** of respondents stated they were non-UK residents, with the largest proportion originating from the USA (**43%**) followed by those from Germany (**36%**).

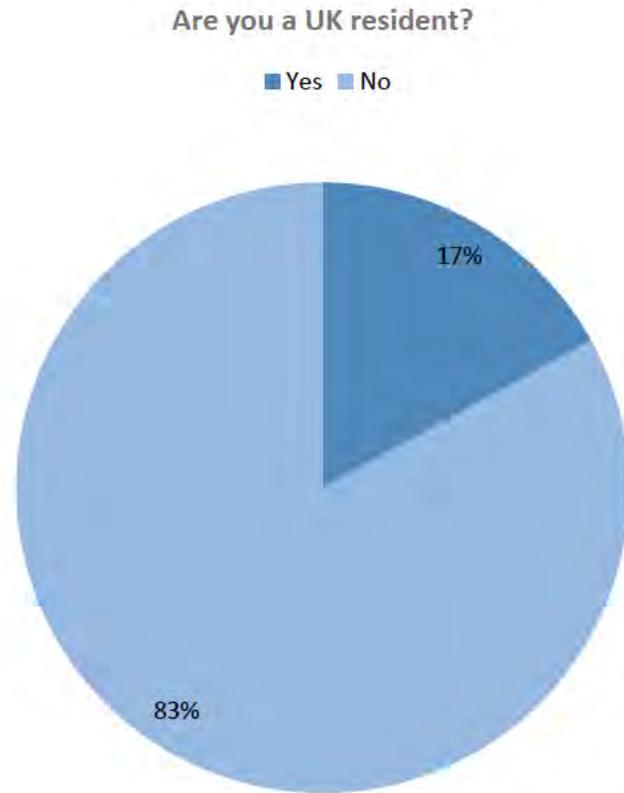


Figure 4: Pie chart to show the proportion of respondents who were non-UK residents

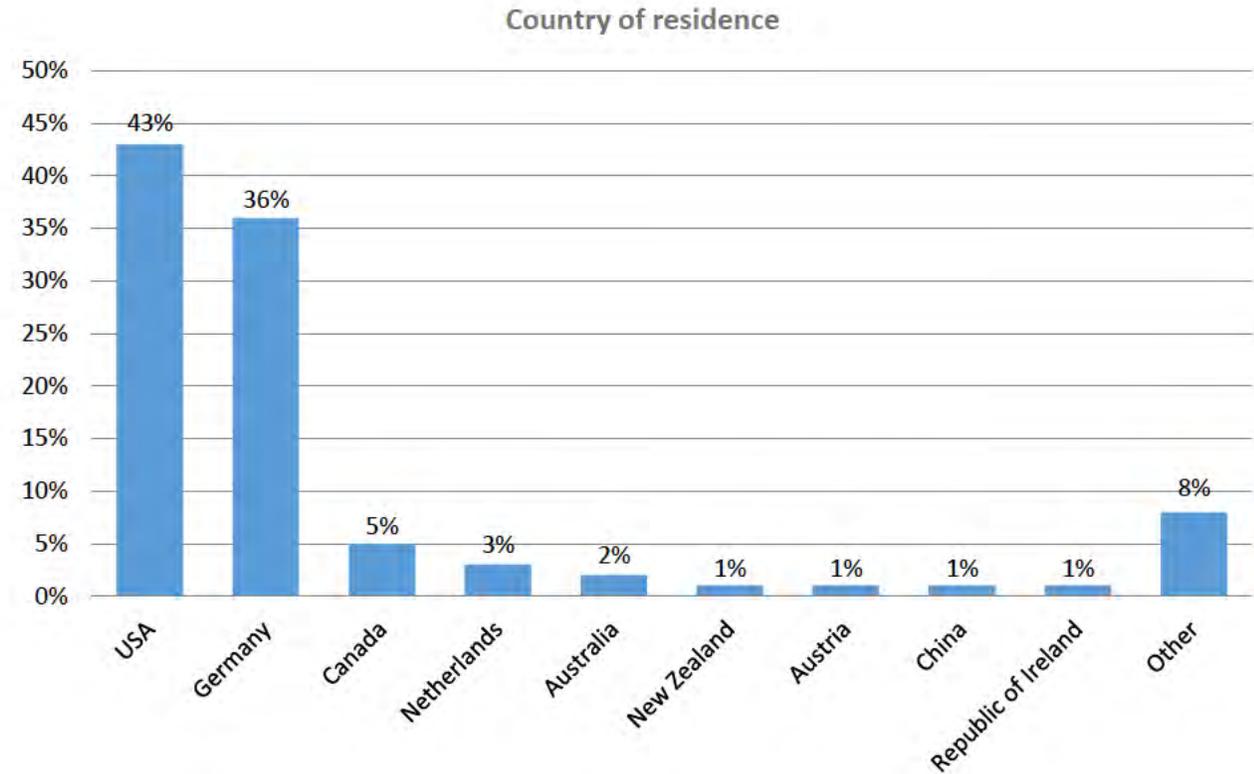


Figure 5: Pie chart to show respondents country of residence

## All respondents: Satisfaction with facilities

The survey then looked to gain insight into passengers' satisfaction with various aspects of the port and asked respondents to rate the quality of the below factors from 1 to 5, 1 being poor and 5 being very good, as seen in figures 6-8. The port's quality of welcome emerged as the most highly rated among passengers, with 97% of all respondents rating this as either a 4 or 5. This was then followed by quality of signage, with 85% rating this as either a 4 or 5. Finally, availability of information on things to do and transport links, was rated as either a 4 or 5 by 76% of all respondents.

Furthermore, these results strongly illustrate the positive image that the port holds in the minds of passengers, in terms of facilities and availability of information. More specifically, the high levels of satisfaction with the quality of welcome, illustrates a key strength and crucial area to maintain in light of BREXIT and a need to promote UK destinations as friendly and welcoming places to visit to international markets. In addition, a report published by VisitBritain (2017) highlighted that the UK's quality of welcome has steadily declined since 2015, which further illustrates its importance.<sup>4</sup>

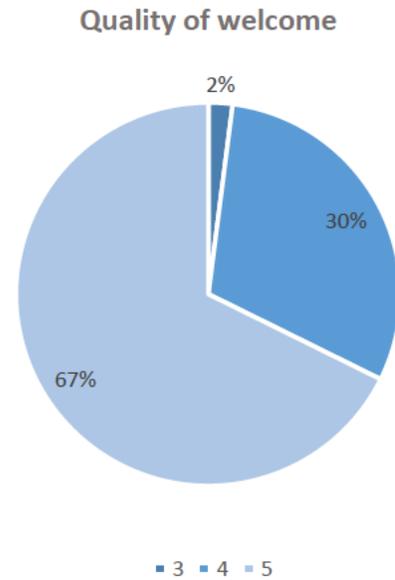


Figure 6: Pie chart to show respondents level of satisfaction the quality of welcome at the Port of Dover

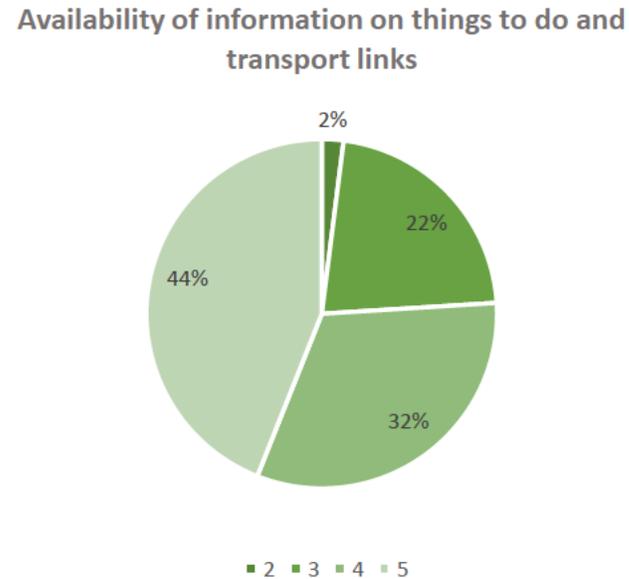


Figure 7: Pie chart to show respondents level of satisfaction with the availability of information on things to do and transport links at the Port of Dover

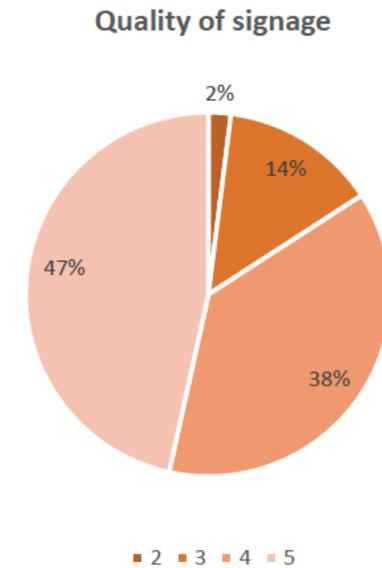


Figure 8: Pie chart to show respondents level of satisfaction with signage at the Port of Dover



**Findings-  
Port of Call**

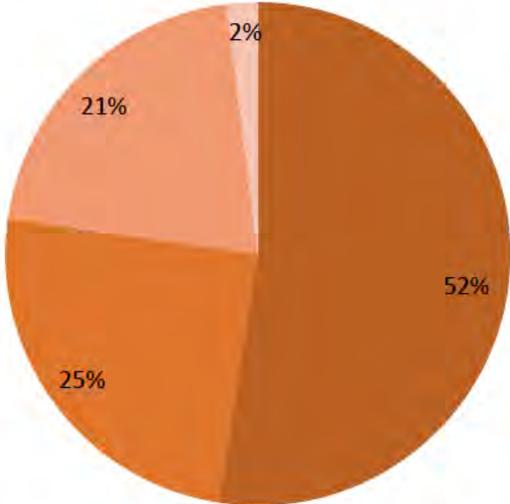
# Port of call: Demographics

This section of the report presents the findings from port of call passengers, who either booked onto an organised shore excursion directly, through a tour operator or travelled independently. Furthermore, the findings will enable recommendations to be made to encourage passengers to spend their time ashore within destinations in Kent, whilst increasing spend.

Looking at the demographics of this market, the majority of respondents were female, with 53% of respondents travelling in a couple and 25% with family, as seen in figure 9 below. In terms of age profile, just over half of respondents were aged 55 years and over (51%). 98% of respondents were non-UK residents and as seen in figure 11, 51% originated from Germany, followed by 30% from the USA.

Who are you travelling with?

- In a couple
- With family
- With freinds
- By yourself



*Comparing these findings with the 2008 survey, both surveys showed the majority of port of call passengers travelled in a couple, with an average party size of 2.2 persons in 2008.*

Figure 9: Pie chart to who port of call passengers travelled with on their cruise

Which of these age brackets do you fall into?

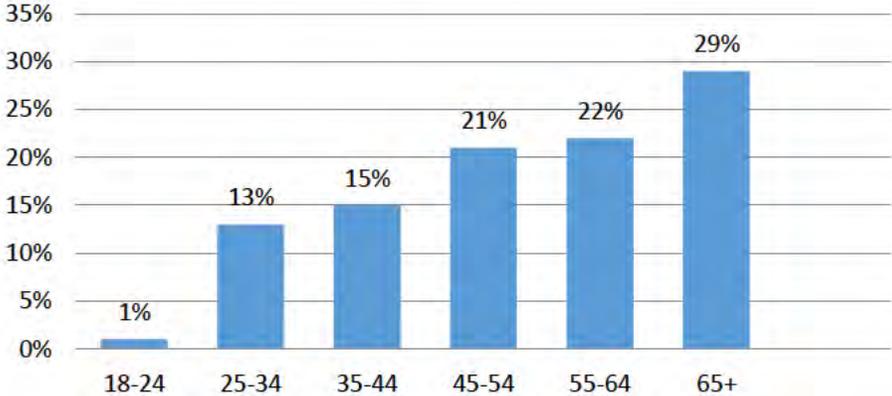


Figure 10: Graph to show the age profile of port of call passengers

Country of residence

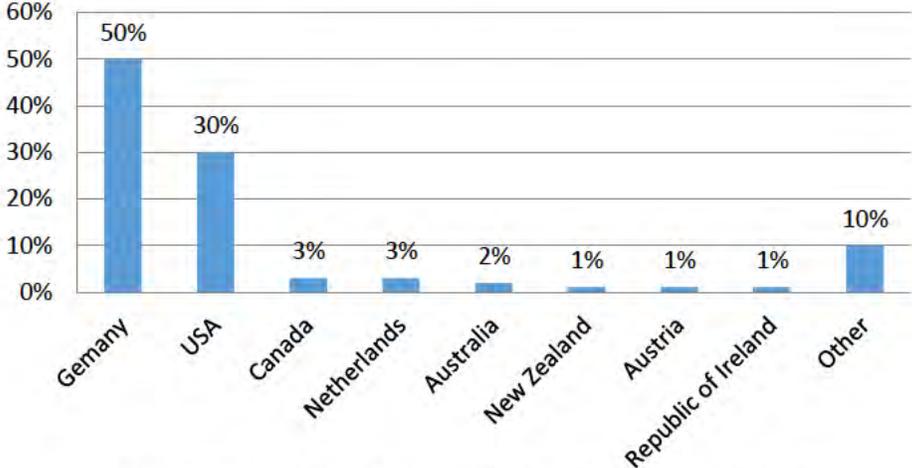


Figure 11: Graph to show the country of origin of port of call passengers

## Port of call: Sources of inspiration

The survey then looked to further understand what influencing factors contributed to passengers' decision to book their cruise, alongside understanding the sources they look to for inspiration. When asked, **43%** of respondents stated it was their desire to travel with the cruise company that influenced their decision, which was then followed by their interest in other destinations on the trip (**24%**). These findings clearly show that passengers are predominantly influenced by a specific cruise company's offer, more so that the destinations on the trip and cruise ships are seen as a trusted and influential factor in the decision making process.

Respondents were then asked what sources of information mostly inspire them when planning shore excursions. Firstly, findings show that **39%** did not go on any shore excursions, choosing to explore the area themselves without any pre-arrangements or bookings.

However for respondents that booked onto shore excursions, the most popular sources included recommendations from friends and family (**15%**) and travel agent or tour operator (**14%**). This was then followed by travel guide websites and other (**both 7%**). Of those who looked to travel guide websites, TripAdvisor came across most strongly, with specific mentions of information given by cruise critics on the digital platform. Other sources of inspiration included, cruise liner websites and experiences from previous trips, with this not only illustrating the strong influence of TripAdvisor, but also the reliance on friends and family to recommend previous positive experiences.

What was the most important factor in your decision to book your cruise?



Figure 12: Pie chart to show the most important factor in port of call passenger's decision to book their cruise

Sources of inspiration when planning shore excursions

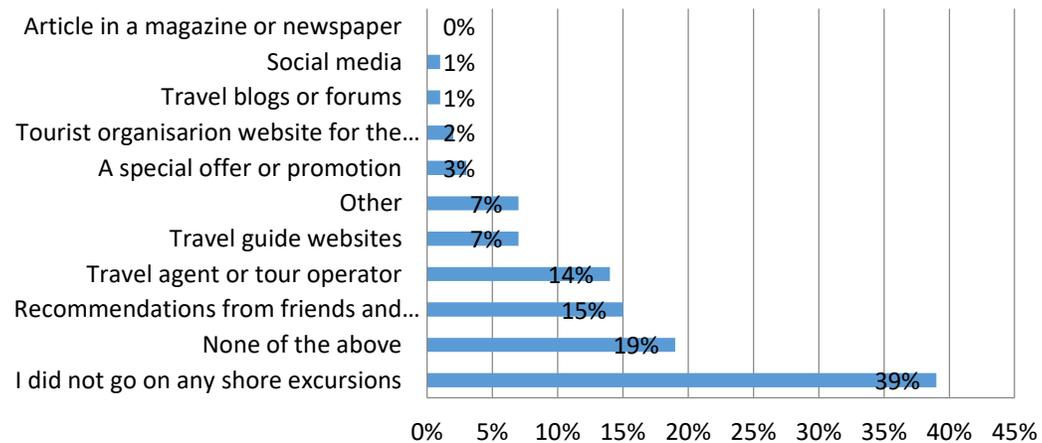


Figure 13: Graph showing the sources of information port of call passengers look to when planning shore excursions

*In terms of the split between port of call passengers that booked onto shore excursions and those that explored the area independently- results from both years show a similar result. Findings from the 2008 study show that **79.5%** went on shore excursions and **40.5%** did not.*

## Port of call: Shore excursions

The survey then looked more specifically at the behaviour of those passengers that booked shore excursions, either through an organised tour or themselves. Firstly, respondents were asked when they booked their shore excursions, with **40%** of passengers choosing to book before they left, closely followed by **38%** booking while on the ship and **22%** choosing to book on the day itself.

The majority of respondents (**64%**) stated they made arrangements independently, rather than through an organised tour, which was preferred by **36%** of respondents. Furthermore, looking at the importance of various factors when choosing shore excursions, the most highly rated factor among respondents was 'to visit an iconic attraction, followed by 'to experience the local heritage and culture'.

### When did you plan your shore excursions?

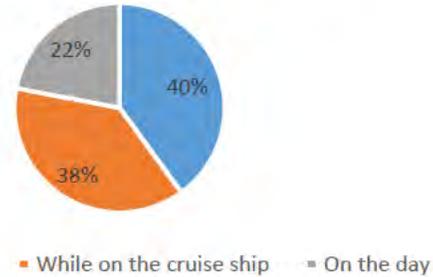


Figure 13: Pie chart showing when port of call passengers planned their shore excursions.

### How did you arrange your shore excursions?

Themselves  
64%

Organised  
Tour  
36%

### Importance of factors when choosing a shore excursion- % of respondents that rated aspects either 'important' or 'very important'

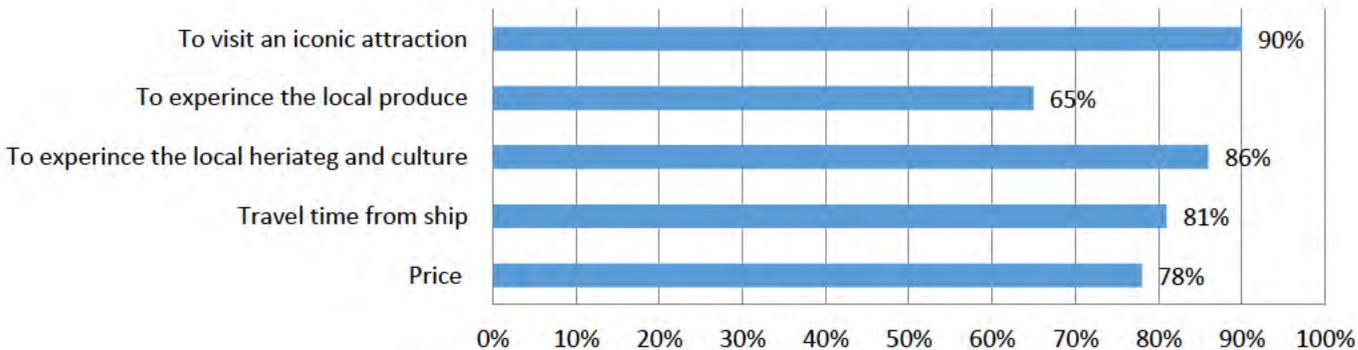


Figure 14: Graph to show the importance of various factors when choosing a shore excursion



## Port of call: Activities while ashore

The survey also looked to identify what respondents did during their stop at Dover and what destinations or attractions they visited. The findings show that **63%** of respondents visited the local area and attractions, while **53%** visited other places in Kent and **4%** took a trip to London.

Of those that visited the local area, the top three visited attractions included, Dover Castle (**82%**), Dover Waterfront (**54%**) and the White Cliffs (**49%**), which were followed by going to a pub or restaurant (**41%**). Of those that visited other destinations in Kent, **93%** visited Canterbury Cathedral, with **13%** having visited Leeds Castle, alongside other places including; Canterbury city centre, Tenterden and Sissinghurst Castle and Gardens.

### What did you do during your stop in Dover?

- Visited the local area /attractions
- Visted other places in Kent
- Took a trip to London
- Other

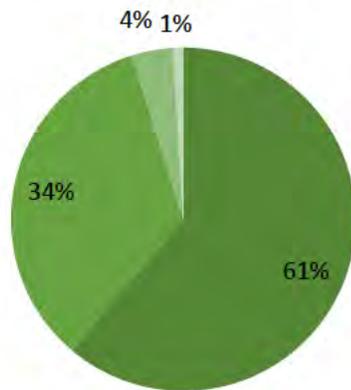


Figure 15: Pie chart showing what port of call passengers did during their stop in Dover



Dover Castle- 82%



Dover Waterfront- 54%



The White Cliffs- 49%



Restaurant/pub or café- 41%



Dover town centre- 41%



Dover Museum & Bronze Age Boat Gallery- 40%

## Port of call: Organised excursions vs. Independent travel

To gain a more in-depth insight into the behaviour of the port of call market, answers were also analysed by respondents who took part in organised tours, those who arranged excursions themselves and those who decided to travel independently.

### Independent travellers

Of those respondents that did not go on any pre-arranged shore excursions, **81%** visited the local area/attractions and **19%** visited other places in Kent. Of those that stated they visited other places in the county, all respondents visited Canterbury Cathedral. In terms of age profile, **82%** were aged either **25-34** or **45-54** years, showing a younger demographic in comparison to all port of call passengers. Furthermore, this results illustrates that independent travel may appeal more strongly to younger passengers.

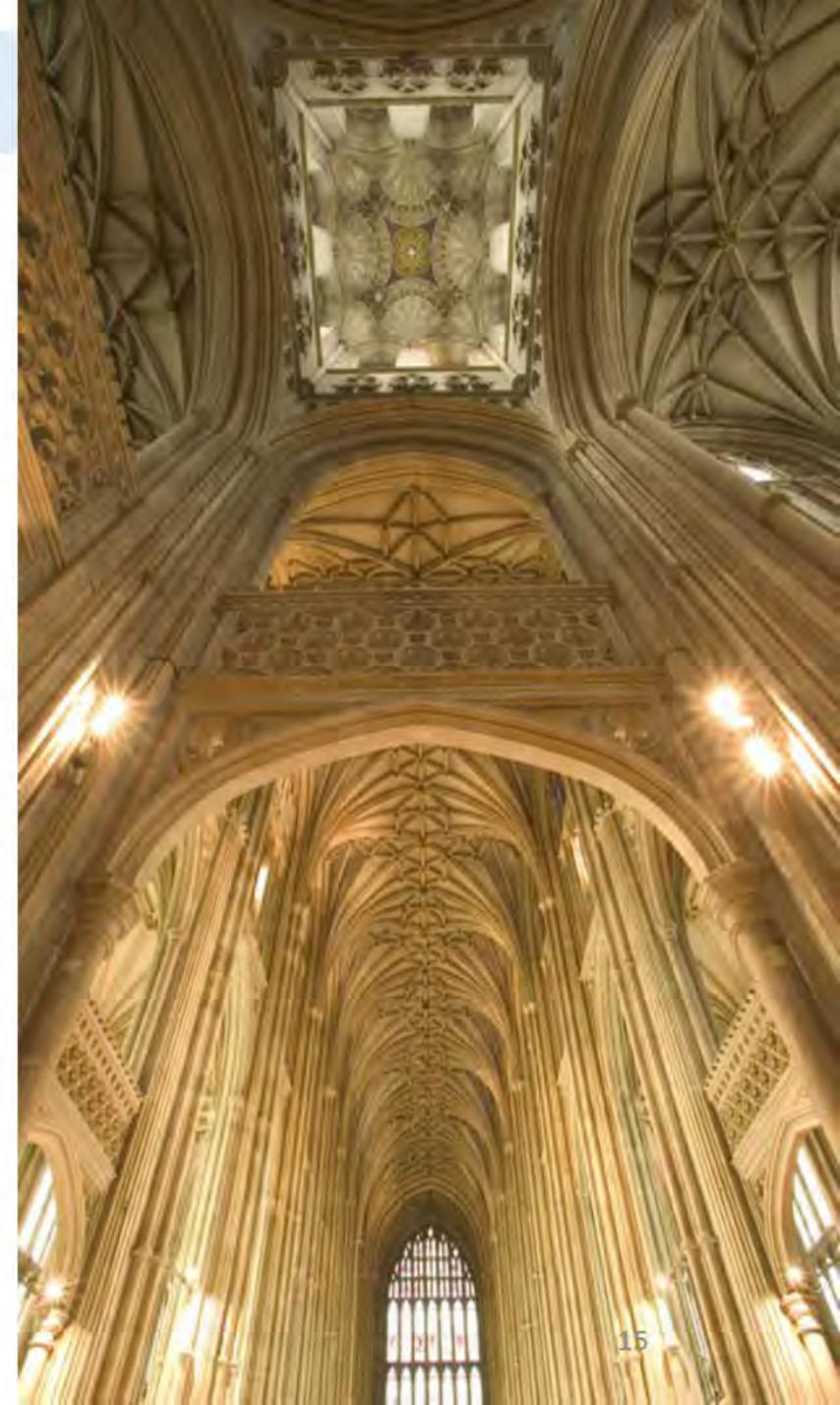
### Organised tours

Looking at passengers that took part in an organised tour, main sources of inspiration were from travel agents or tour operators (**52%**), with **52%** choosing to book before they left and **46%** while on the cruise ship. In terms of areas and attractions visited, **73%** visited other places in Kent and of these respondents, **84%** visited Canterbury Cathedral and **32%** Leeds Castle. Other places and attractions cited included Canterbury City, Tenterden, Deal and Sissinghurst Castle and Gardens.

Alongside this, **21%** visited the local area, with only **12%** taking a trip to London. Furthermore, when asked about the importance of various factors when choosing shore excursions, the top two factors included, visiting an iconic attraction (**91%**) and experiencing local heritage and culture (**85%**). Therefore, information shared with tour operators should incorporate these factors. Lastly, in terms of age, **72%** of passengers were aged either **55-64** or **65+** years, showing the appeal to the slightly older age profile.

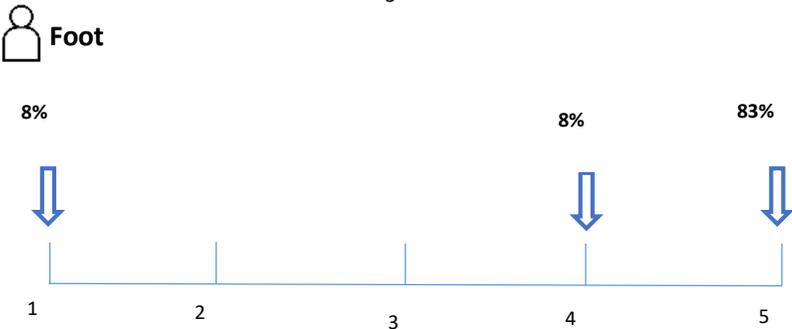
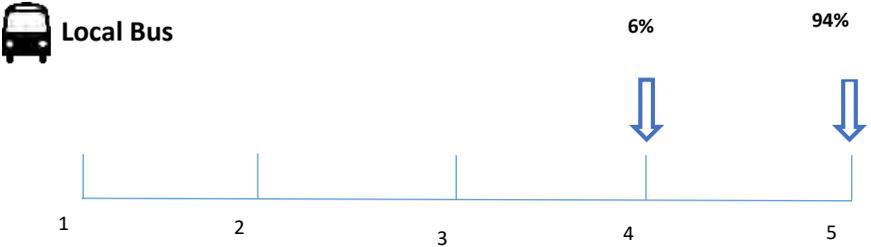
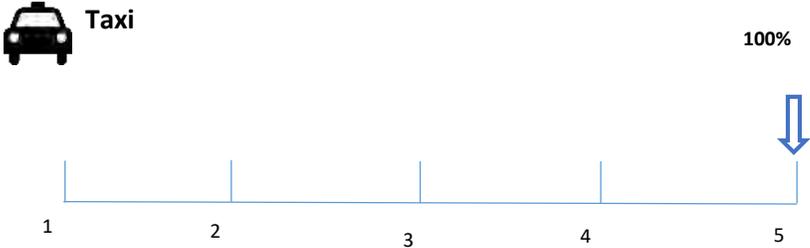
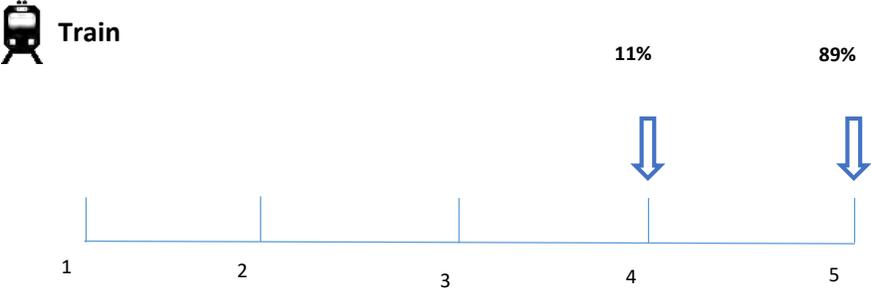
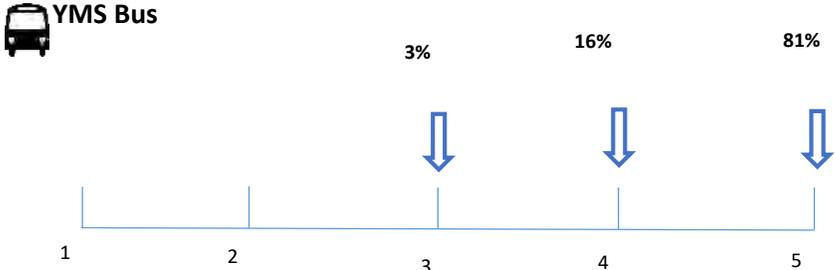
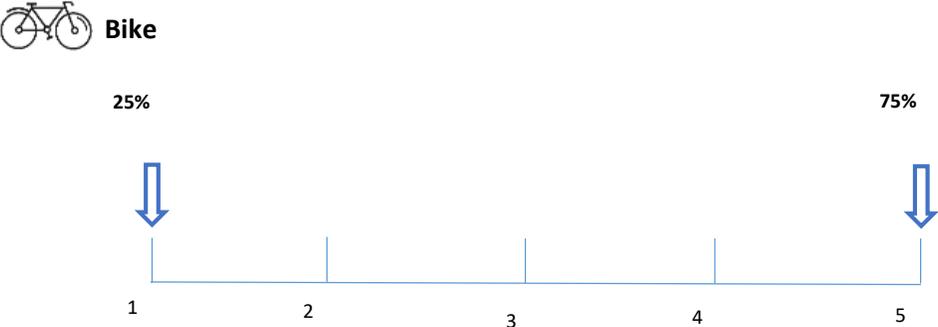
### Arranged excursions themselves

For passengers that made arrangements for excursions themselves, the most popular source of inspiration was recommendations from friends and relatives, followed by travel guide websites such as TripAdvisor. Therefore, the latter should be fully utilised to present these passengers with a range of excursions in the county. In terms of booking lead time, passengers were equally as likely to book before they travelled as they were on the ship, or on the day itself. Looking at activities while ashore, **68%** visited the local area, while **31%** visited other places in Kent and **3%** visited London. In terms of age, **56%** of respondents were aged either **21-40** or **31-50** years old, showing that this type of independent travel may appeal more strongly to the younger demographic, as opposed to organised tours.



# Port of call: Transport

The survey also looked to understand which mode of transport passengers used to get around during their visit, excluding those on organised tours. The results show that the YMS bus was the most popular choice of transport in terms of the number of passengers that used the service, followed by the local bus. Alongside this, the survey asked respondents to rate their satisfaction with their experience on a scale from 1 to 5 and as seen in the diagrams below, the most highly rated mode of transport was taxi, followed by local bus and train.



Total estimated spend per person while ashore

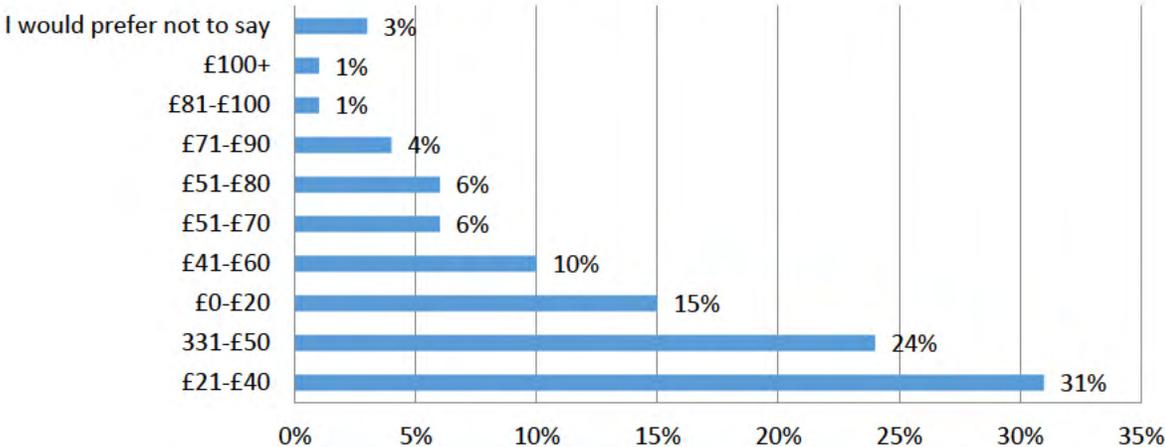


Figure 16: Graph to show the total estimated spend per person while ashore, excluding any pre-paid activities



While ashore, the largest proportion of port of call passengers spent between **£21-£40**, followed by **£31-£50** per person, excluding any pre-paid activities

## Port of call: Barriers and further comments

Finally, the survey looked to establish why Port of call passengers decided not to stay in Kent during their visit. Findings show that **38%** of respondents stated this was due to their desire to visit an attraction outside of the county and **38%** selected 'other' factors which included the weather and wanting to visit London during their stay. In addition to this, a smaller proportion of respondents (both **13%**) selected a lack of knowledge of what there is to do a see as a barrier, alongside not being able to find anything that appealed to them.

Therefore, increasing potential visitors' knowledge of what there is to see and do in Kent should be a priority. Giving them a specific reason to visit would increase their appeal to discover the county. A good first step could be by ensuring our destination's content is featured where these visitors look for inspiration i.e. travel guide websites and content from travel and tour operators.

Furthermore, respondents were asked if they had any further comments about what would improve their visit to Kent or encourage them to visit in the future. An answer that emerged strongly, was the desire to have access to more information on places to visit and activities in 4 hours, supporting the above recommendation. Alongside this, respondents also cited that discounted entry to Kent attractions for cruise passengers would be attractive and further encourage them to explore the local areas. Finally, respondents also mentioned that the YMS should continue to be used and promoted, further illustrating its importance in the area for the cruise market.

There was a particular attraction you wanted to visit outside of Kent

38%

Not sure what there is to see and do in Kent

13%

You couldn't find anything that appealed to you

13%





**Findings-  
Turnaround**

## Turnaround: Demographics

Moving onto turnaround passengers, the findings show that the majority of respondents were female (65%), with 63% travelling in a couple and 16% with family and the majority of respondents were aged 55 years and over (82%).

60% of respondents were non-UK residents and of those that did originate from the UK, they mostly came from Essex, Kent, Hertfordshire or Durham. In terms of international passengers, the largest proportion of overseas visitors were from the USA (75%), followed by 10% from Canada.

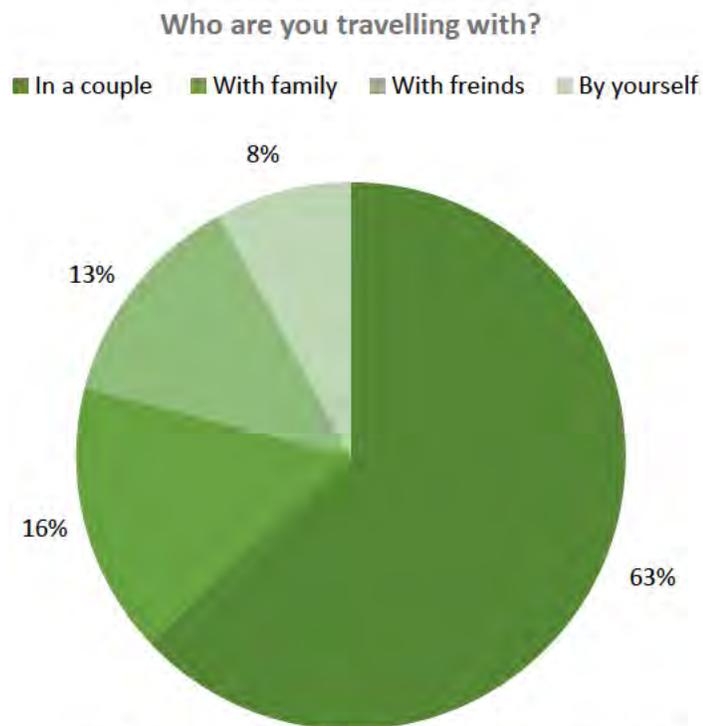


Figure 17: Pie chart showing who turnaround passengers were travelling with

### Which of these age brackets do you fall into?

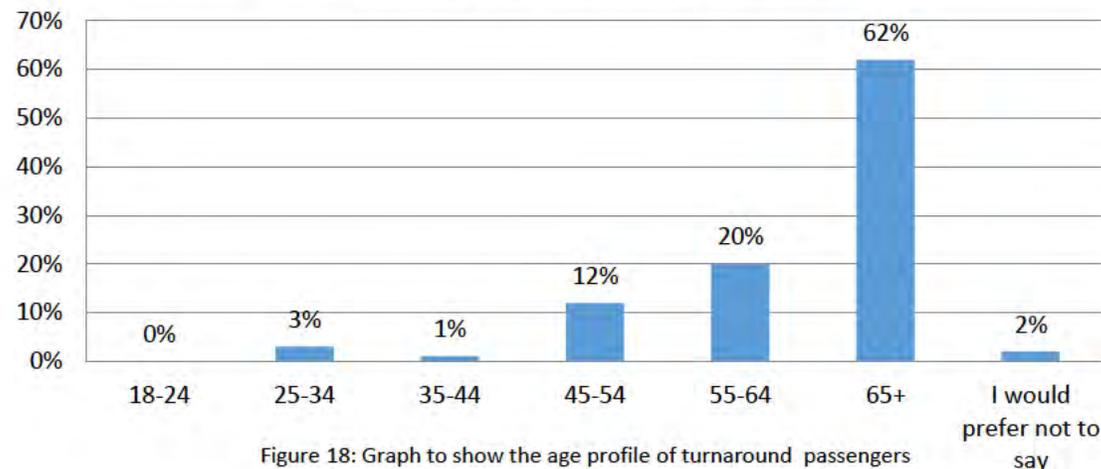


Figure 18: Graph to show the age profile of turnaround passengers

### Country of residence

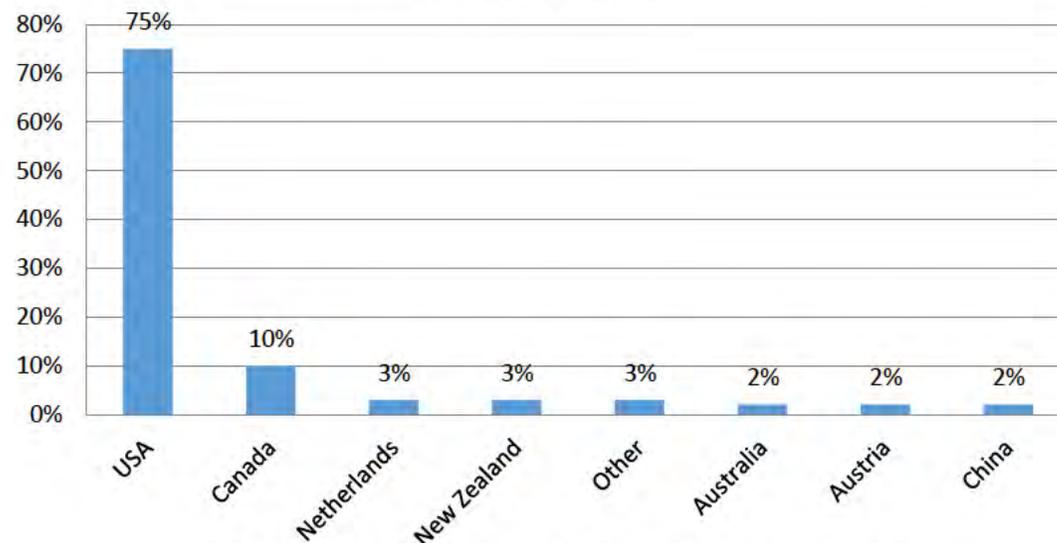


Figure 19: Graph to show the country of residence of turnaround passengers

## Turnaround: Sources of inspiration

When asked what was the most important factor in their decision to book their cruise, **40%** stated it was their desire to travel with the cruise company. This was then followed by **38%** stating it was due to other destinations on the trip (figure 19).

Looking at sources of inspiration used by turnaround passengers, findings show that **30%** drew inspiration from friends and family, alongside **30%** stating other sources, which predominantly included experiences from previous trips and information from cruise companies. Here, it is evident that turnaround passengers have a strong sense of rapport with their preferred cruise company, looking to them directly for information, based on a positive previous experiences that may be familiar and comfortable for them.

What was the most important factor in your decision to book your cruise?

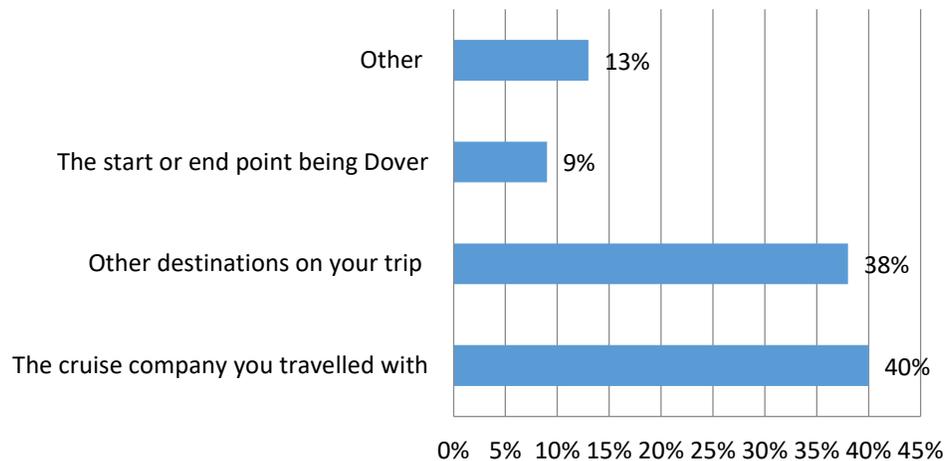


Figure 19: Graph showing the most important factor in the decision to book their cruise among turnaround passengers

Sources of inspiration when planning shore excursions

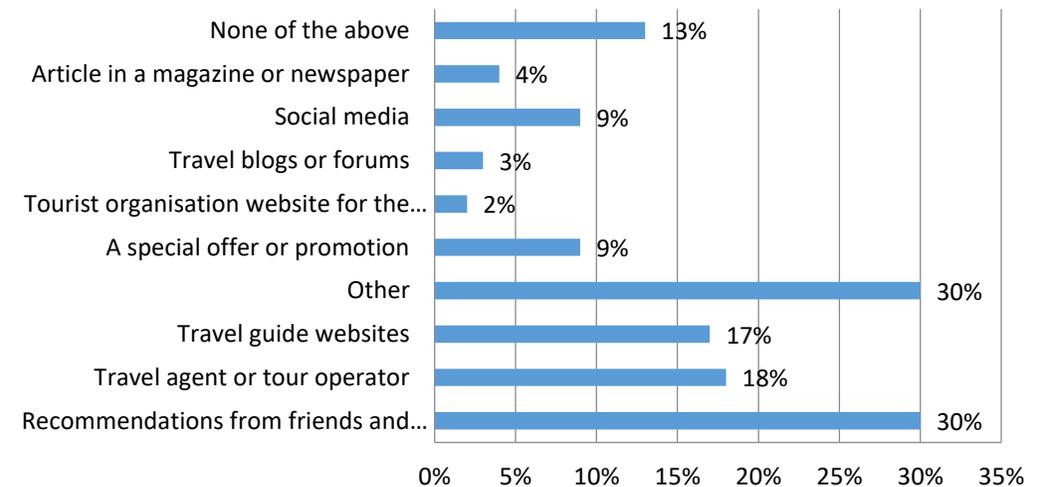


Figure 20: Graph to showing sources of inspiration used by turnaround passengers

## Turnaround: Motivations and Transport

When asked what was the main reason they decided to depart from or return to Dover, findings show this is mainly due to the fact that the cruise they wanted to go was departing or returning here (68%).

It is clear that turnaround passengers often do not see departing or returning to Dover as a influencing factor in their decision to book their cruise. Consequently, extending turnaround passengers time ashore is slightly more complex compared to the port of call market, as they may not see visiting the area as a priority. Therefore, this market presents a significant opportunity for growth by encouraging them to arrive earlier or leave later and explore what the area has to offer. In addition, these results also lead to the recommendation for better collaboration with cruise companies, as their endorsement to visit areas in the county is trusted by passengers.

What was the main reason you decided to depart/return to Dover on your journey?

- The cruise you wanted to go on was departing or returning here
- Other
- It was convenient
- Family/friends live nearby
- You wanted to explore the local area before/after your cruise

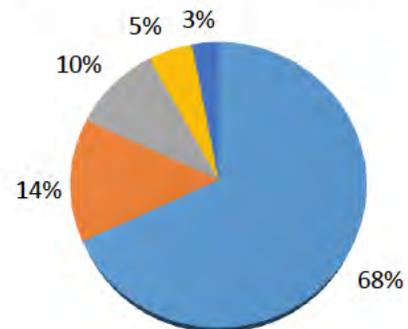


Figure 21: Pie chart to the main reason turnaround passengers decided to depart/return their journey from Dover



## Turnaround: Activities while ashore

**83%** of turnaround respondents stated they did not visit any of the local sites or attractions in Dover, Deal or Sandwich. However, of those that did, the top three visited sites/attractions included Dover Castle, the White Cliffs and going to a pub/restaurant\*.

Passengers were then also asked if they had or were planning on stopping off anywhere else in Kent, to which **93%** stated 'no'. These results show that only a small proportion of passengers spent time in the local area prior to or after their cruise, therefore presents a considerable barrier to overcome to encourage them to extend their stay in the local area either before or after their trip, as previously highlighted.



Dover Castle- 47%



The White Cliffs- 40%



Restaurant/pub or café- 33%



Dover Museum & Bronze Age Boat Gallery- 33%



Dover Waterfront- 13%



Dover town centre- 13%

\*Results are based on a small sample

## Turnaround: Overnight visits and spend

Of those respondents that specified they had or were planning on visiting either the local area or another place in Kent, they were asked if they had or were planning on staying overnight, to which 55% stated 'no' and 46% 'yes'. Of those that stated they did stay overnight, all respondents specified this was for 1-2 nights, with 60% staying in a hotel, followed by 30% staying in a B&B. In terms of estimated spend on food/drink or entry to attractions per person, in either Kent or the local area, 32% selected £0-£20, followed by 23% preferring not to say and 18% spending £41-£60. These results show an opportunity to work more closely with hotels in the area to increase the number of turnaround passengers staying overnight.

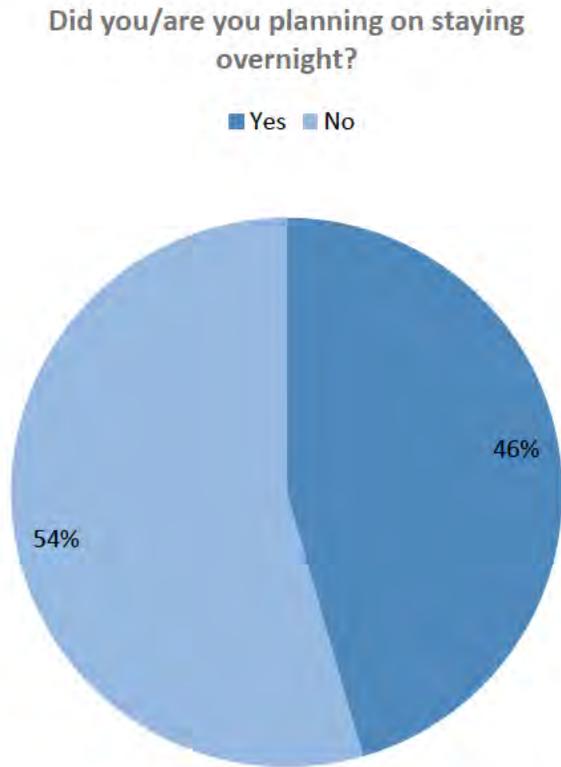


Figure 22: Pie chart to show the proportion of turnaround passengers that stayed overnight

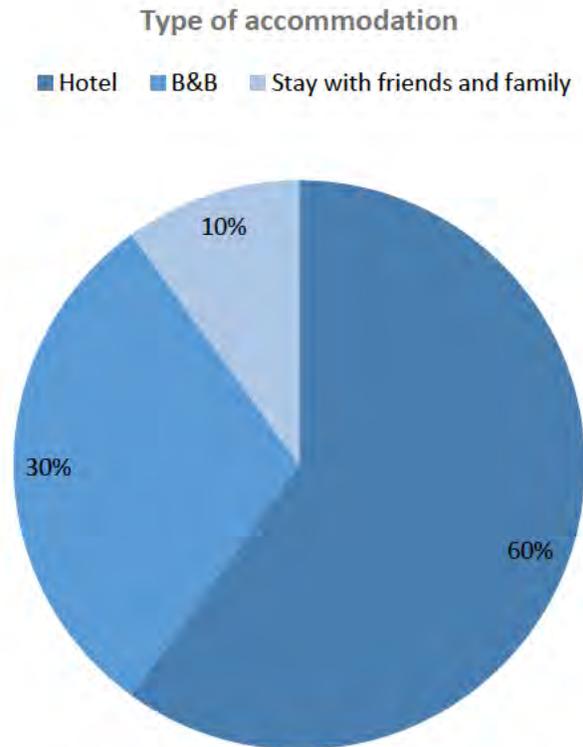


Figure 23: Pie chart to show the type of accommodation turnaround passengers stayed in

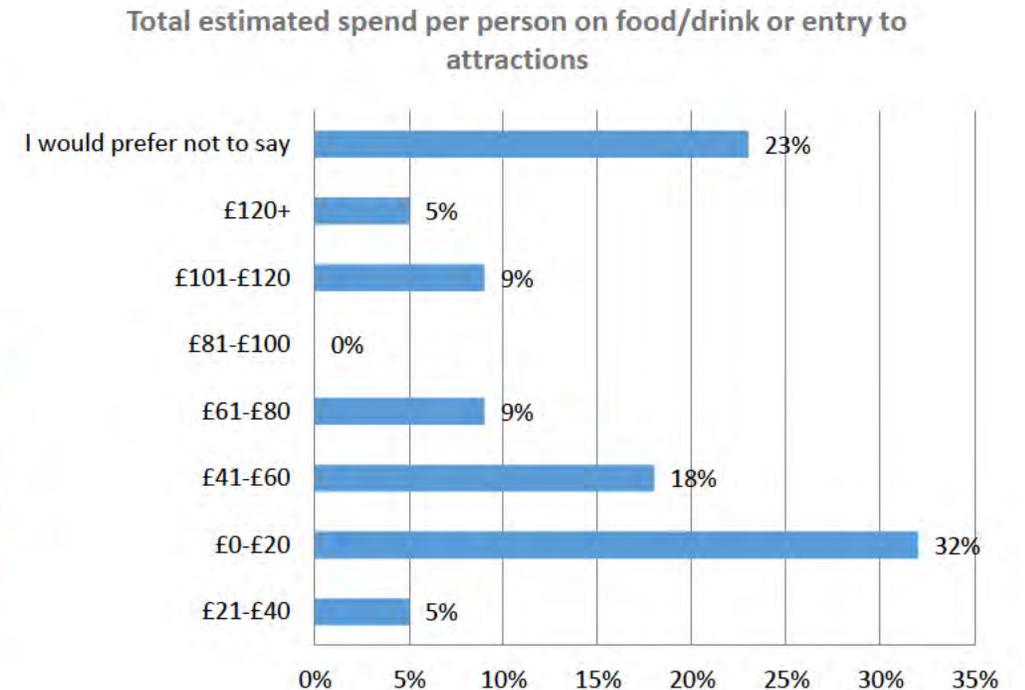


Figure 23: Graph showing the total estimated spend per turnaround passenger

## Turnaround: Barriers and further comments

Looking at the main reasons for not stopping off in Kent, the majority of respondents stated they wanted to get home/to the port quickly (65%), followed by 24% stating other reasons, including, a lack of time, they lived locally, spent time in London before boarding. This further illustrates the need to address such barriers and present spending time in Kent or the local area as an attractive and convenient way to extend their trip.

In addition, when asked if they had any further comments about what would improve their visit to Kent or encourage them to visit in the future, responses included;

- More information needed on things to do in advance, as many expressed they were unaware of things to do
- Pre-cruise packages and more organised tours
- More information from cruise companies through their websites on things to do before or after their cruise
- Shuttle bus from Port
- Staff at the port were friendly and the lounge was pleasant, which would encourage them to visit again
- More information on hotels needed to extend their stay
- More information needed at the train stations
- The ability to leave bags somewhere to go and explore the area



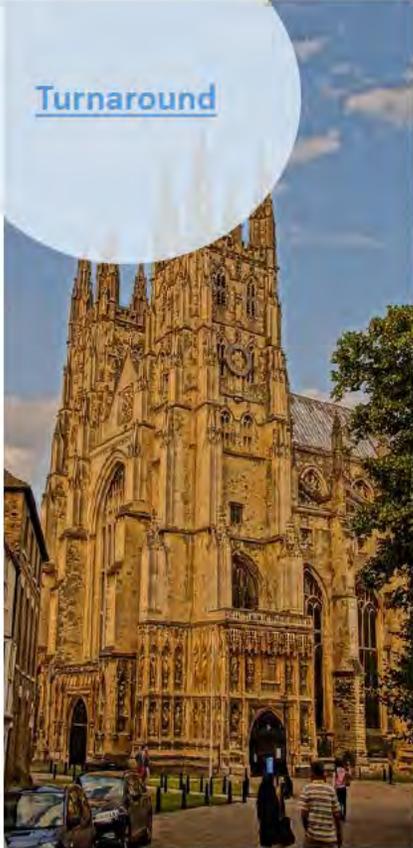
### Port of Call



When looking at the overarching aim surrounding port of call passengers, emphasis is placed on the need to continue to encourage passengers to visit attractions and destinations within the county, alongside increasing visitor spend. Furthermore, the following recommendations have emerged that may contribute towards achieving these aims.

- **Provide information to port of call passengers on things to do in the local areas and in Kent in 4 hours.** In doing this, it provides passengers with inspiration for either independent travellers who did not book shore excursions, or those that decided to book shore excursions themselves. Furthermore, these itineraries can also be shared with tour operators.
- Alongside providing **information on things to do**, it is vital to **place emphasis on timings and travel time** from the cruise ship, ensuring that passengers feel they are able to get back to the ship in good time prior to departure. Therefore, links with transport providers should be a priority and the information provided should ensure that the travel route and timings are clear.
- As previously highlighted it is important to **link with transport providers** and form partnerships, and findings illustrated the positivity surrounding the YMS bus, being one of the main comments that emerged. Furthermore, respondents also commented that cruise passengers could obtain **discounted entry to various Kent attractions** to encourage them to visit in the future.
- In terms of sources of inspiration, **recommendations from friends and relatives** and **information from travel agents/operators** emerged strongly. However, travel guide websites and cruise liner websites were also highlighted, with emphasis placed on use of TripAdvisor. Therefore, this platform should be fully utilised, as well as ensure content is shared with and by the cruise companies.
- Findings also showed that only 40% of shore excursions were booked prior to departure, with the remainder either booked on the ship or on the day. Consequently, this presents an opportunity to **supply information onboard**, giving those passengers that did not pre book sources of information and inspiration to encourage them to visit the county.
- **'Iconic sites'** and **'local heritage and culture'** were the top two important factors highlighted by passengers when choosing shore excursions, and these should be a main focus of itineraries and information shared.
- The majority of passengers spend either £21-£40 or £31-£50 per person, excluding any pre-paid activities. **Creation of itineraries** should incorporate travel, places to eat and attractions, alongside opportunities for additional activities such as shopping, to maximise visitor spend.

### Turnaround



Looking at the aim for turnaround passengers, it is centred around the idea of encouraging passengers to extend their stay in the county prior to or after their cruise journey. The findings show that currently only a small number of passengers are doing so, with remaining passengers mainly deterred by lack of time and wanting to get to the port or home quickly.

- In an effort to increase time spent ashore, passengers need to be given a **clear reason to visit**, as they may be unaware of what there is to do. To address this, pre-cruise packages and itineraries could be created to give passengers inspiration on things to do. In turn, this will extend their stay by a day, an overnight stay or a short break that's **built in as part of their trip**.
- When looking at sources of inspiration, experiences from past trips came up strongly, alongside a strong sense of rapport with the cruise liners themselves. Information on pre-cruise ideas could therefore be shared and promoted by cruise liners, to capture passengers' interest.
- A major part of encouraging passengers to extend their journey and spend time in Kent is to **promote the range of accommodation**, and therefore partnering with local hotels should be a main focus in achieving these goals. In addition, when asked what would encourage them to extend their trip, some passengers mentioned the ability to leave bags somewhere to explore the area. Although doing this at the port itself may present a security risk, passengers would be able to leave bags at the hotels if they decided to stay for a night prior to or after their trip.
- The quality of the port's lounge and welcome was positively perceived by passengers and consequently should be shared and highlighted.
- In creating and sharing pre-cruise packages including the potential for overnight stays, this will in turn increase passenger spend, including additional secondary spend in the local area.

## References

<sup>1</sup> *CLIA (2017) UK and Ireland Cruise Review 2017*

<sup>2</sup> *CLIA (2019) Cruise Trends and Industry Outlook*

<sup>3</sup> *CLIA (2018) Travel agent cruise industry outlook- winter 2018*

<sup>4</sup> *VisitBritain (2017) How the world views Britain – 2017*

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