



# STRATEGIC RESEARCH & INSIGHT

## REPORT

Visitor Survey for Sandwich Bay & Pegwell Bay

Land Use Consultants/ Dover District Council

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## 1. Headline Findings

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### **The typical visitor**

The most typical visitor is aged 55+ (59% of respondents), is in the C1 social economic grade (42%), and is from Kent.

They are likely to be by themselves (50%), or with one other adult (45%), and are unlikely to have any children with them (85% of respondents have no children with them). They are likely to have a dog with them (70% visit with a dog) and have travelled by car (92%). They are also likely to have visited before (only 12% say this is their first visit).

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### **The NEMO project has affected around a third of visitors to Pegwell Bay**

Three in ten (29%) visitors to Pegwell Bay say their recent visits have been affected by the NEMO project. Two thirds (66%) say it hasn't affected their visits and 5% don't know. Only 3% of visitors to Sandwich Bay say the project has affected their visit.

The main inconvenience appears to be the chalk and mud left behind by the construction work. Visitors complain that their shoes and clothes get muddy.

However, only around 14% say that the cabling will have any long-term impact. These visitors again complain about mess left behind by the construction, but also effects on the landscape.

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### **No change since the implementation of the new Discovery Park**

Very few visitors (5%, or 9 respondents) have noticed any change since the implementation of the new Discovery Park Enterprise Zone. Not all the changes are negative, with one visitor saying it's 'easier to get here now'.

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### **Dog-walking is the most common reason for visiting**

Around two-thirds (67%) cite dog-walking as a reason for visiting the sites. 78% of these say this is their regular dog-walking area and 92% say they let their dog off the lead there.

The other most common reasons for visiting are enjoying the coast (52%), exercise (49%), peace and quiet (49%) and wildlife (40%).

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### **Fewer visitors are walking north at Sandwich Bay, but more are walking south**

In 2012 the vast majority (80%) of visitors to Sandwich Bay walked 'north towards the point', whereas this year only 44% walk this route. Similarly, only 5% walked 'south along the coast' in 2012, whereas 53% of visitors now walk this route.

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### **Better refreshments, shelter, more dog waste bins and more toilets**

When asked what could improve their visit, 13% of visitors to Pegwell Bay suggest better refreshments, and 8% suggest better shelter.

The two most suggested improvements for Sandwich Bay are more dog waste bins (36%) and more toilets (15%).

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## 2. How and why has this research been conducted?

<b>Why was this research conducted?</b>	In conjunction with Land Use Consultants, Dover District Council wished to undertake a survey of visitors to two areas in the Dover District, namely Pegwell Bay and Sandwich Bay
<b>How many surveys have been conducted?</b>	A total of 227 face-to-face interviews were carried out with respondents visiting Pegwell Bay and Sandwich Bay to determine the reasons behind those visits – 101 interviews at Pegwell Bay and 126 interviews at Sandwich Bay. Therefore, 45% of interviews were conducted at Pegwell Bay and 55% at Sandwich Bay.
<b>When did the fieldwork take place?</b>	The fieldwork took place between 6th February and 22nd February 2018. Interviews were conducted Monday to Saturday between 8am and 6pm at Sandwich Bay and 8am and 4pm at Pegwell Bay (due to car park closures).
<b>How were the interviews conducted?</b>	In order to ensure the research was conducted with a cross-section of respondents, one person in any one visiting party was interviewed and selected at random.
<b>Why don't some charts sum to 100%?</b>	Please note that all percentage figures in this report have been rounded to no decimal places. This may produce some unavoidable rounding errors where percentages do not sum to 100%.
<b>Pegwell Bay Vs Sandwich Bay</b>	In this report we refer to the overall results, which includes visitors to both sites, and sometimes the individual results for Pegwell Bay or Sandwich Bay where they are worth noting.
<b>Comparisons with previous visitor survey</b>	A visitor survey was also undertaken in 2012. We have noted any differences between the two surveys where results differ significantly, and where it makes for interesting reading.
<b>How accurate are the survey results?</b>	<p>Based on a sample of 227 completed interviews there is a confidence interval of <math>\pm 6.5\%</math> at a 95% confidence level.</p> <p>The confidence interval is the plus-or-minus figure usually reported in newspaper or television opinion poll results. For example, if you use a confidence interval of <math>\pm 6.5\%</math> and 50% percent of your sample picks an answer you can be "sure" that if you had asked the question of the entire relevant population between 43.5% (50 – 6.5) and 56.5% (50 + 6.5) would have picked that answer. The confidence level tells you how sure you can be. It is expressed as a percentage and represents how often the true percentage of the population who would pick an answer lies within the confidence interval. The 95% confidence level means you can be 95% certain; most researchers use the 95% confidence level.</p> <p>When you put the confidence level and the confidence interval together, you can say that you are 95% sure that the true percentage of the population is between 43.5% and 56.5%.</p>

## 3. Main Survey Results

### Profile of visitors

#### Over half of visitors come from Cliffsend, Deal, Ramsgate and Sandwich

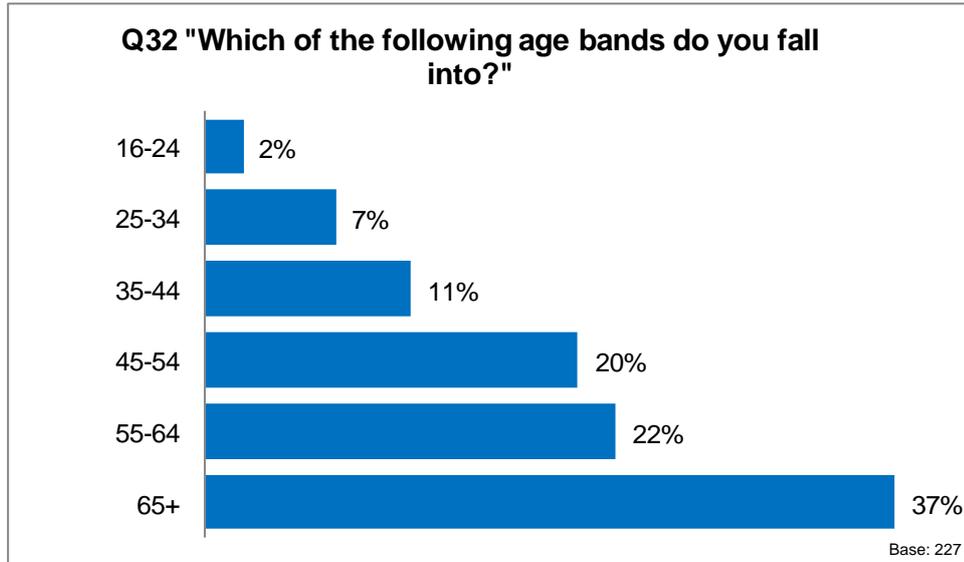
- 3.1 Visitors were asked where their nearest home town is. Unsurprisingly, the most common towns – Cliffsend, Deal, Ramsgate and Sandwich – are those closest to Pegwell Bay and Sandwich Bay.
- 3.2 As shown in the table below, there are significant differences between Pegwell Bay and Sandwich Bay. For example, 34% of visitors to Pegwell Bay are from Ramsgate, but only 2% of visitors to Sandwich Bay are from Ramsgate.

Q2 Home town	All	Pegwell Bay	Sandwich Bay
Cliffsend	5%	12%	-
Deal	11%	1%	18%
Ramsgate	16%	34%	2%
Sandwich	21%	1%	37%
Other	47%	52%	43%

- 3.3 Nearly half of visitors (47%) are from areas other than Cliffsend, Deal, Ramsgate and Sandwich. We have therefore plotted the home town of respondents onto two maps (shown below).
- 3.4 The map on the left shows respondents across the UK, whilst the map on the right focuses on respondents from the South East.
- 3.5 Only one respondent was from abroad (New Zealand).

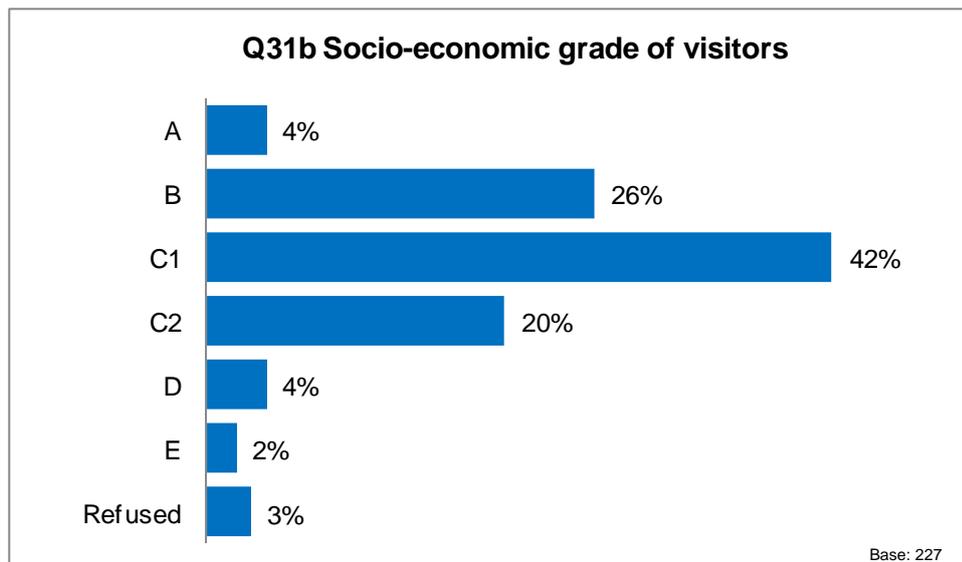


**Generally visitors are aged 55+**



- 3.6 As shown in the chart above, there is a gradual increase in the percentage of visitors from the younger age brackets to the older age brackets.
- 3.7 The percentage of visitors in each age bracket differ between Pegwell Bay and Sandwich Bay. Most notably, almost half (48%) of visitors to Pegwell Bay are 65+, whilst only 28% of visitors to Sandwich Bay are 65+.
- 3.8 However, when grouping those aged 55 - 64 and those aged 65+, there are actually more visitors aged 55+ from Sandwich Bay (61%) compared to Pegwell Bay (56%).

**More visitors in the higher SEG grades compared to the national average**



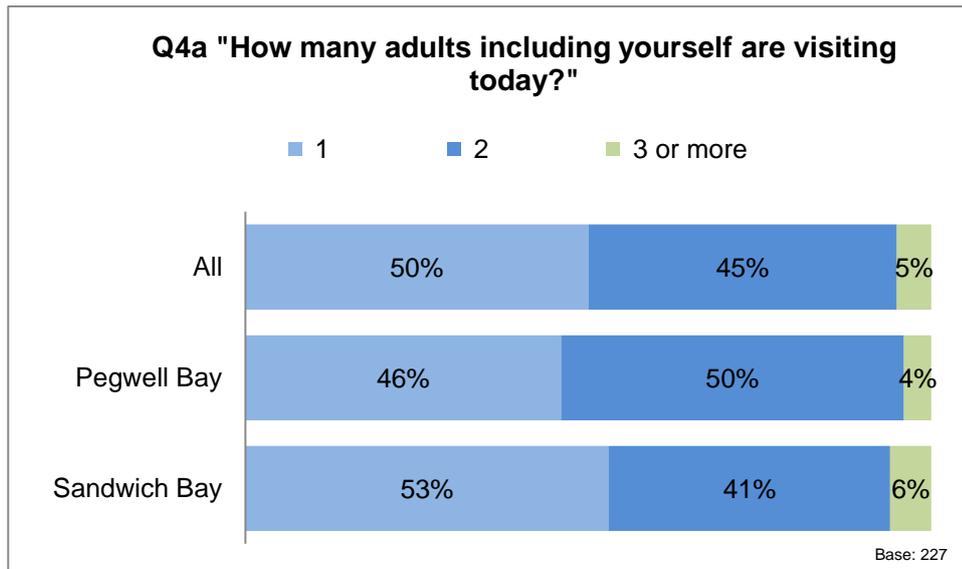
- 3.9 There is a higher proportion of visitors in the higher social grades compared to the national average for England.

3.10 The percentage of people in the A/B grades in England is 22.7% (compared to 30% here), 30.8% in the C1 grade (compared to 42% here), 20.6% in the C2 grade (20% here), and 25.7% in the D/E grades (6%) here<sup>1</sup>.

**A higher proportion of female respondents than male respondents**

3.11 56% of respondents across both sites are female (44% male). At Pegwell Bay 61% of respondents are female, whilst the split at Sandwich Bay better reflects the general population – 52% of respondents are female.

**Larger parties of people at Pegwell Bay than Sandwich Bay**

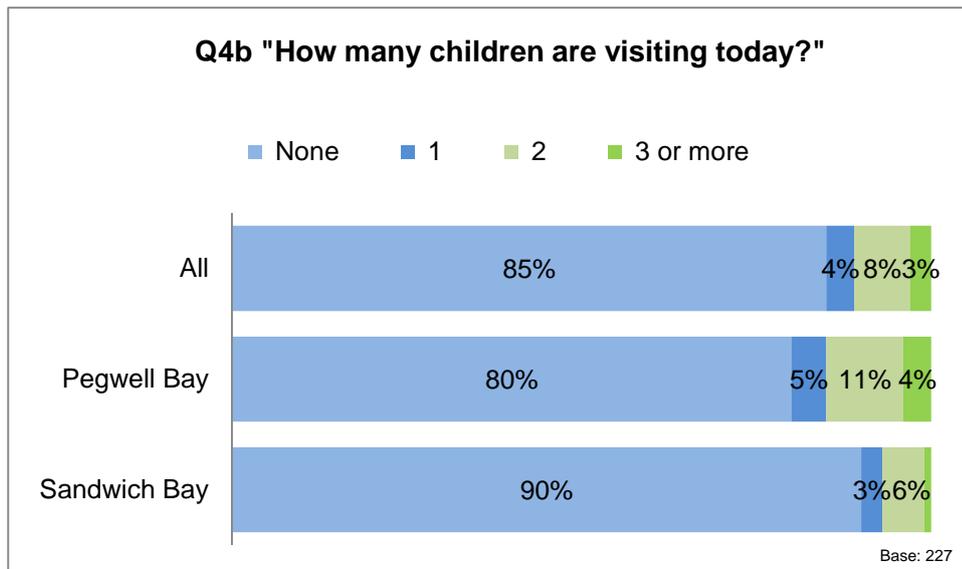


3.12 Although results are broadly similar, those interviewed at Pegwell Bay are more likely to include two or more adults compared to Sandwich Bay (54% and 47% respectively).

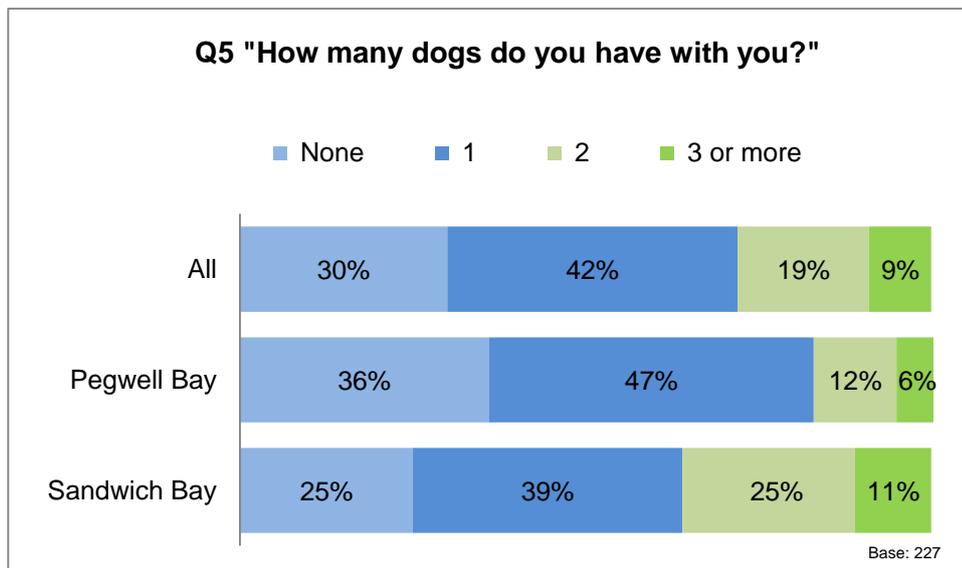
3.13 Those interviewed at Pegwell Bay are also more likely to have children with them.

3.14 As shown overleaf, 20% of visitors at Pegwell Bay have a child as part of their visiting party, compared to only 10% at Sandwich Bay.

<sup>1</sup> 2011 Census: Approximated social grade, local authorities in England and Wales



**Higher proportion of dog walkers at Pegwell Bay**



3.15 The percentage of those walking a dog also differs to the previous survey results. In 2012, 60% of visitors were walking a dog compared to 70% this time around (across both sites).

3.16 Also, visitors to Sandwich Bay are more likely to have a dog with them (75% of visitors) compared to visitors to Pegwell Bay (65% of visitors).

**The overwhelming majority travel by car**

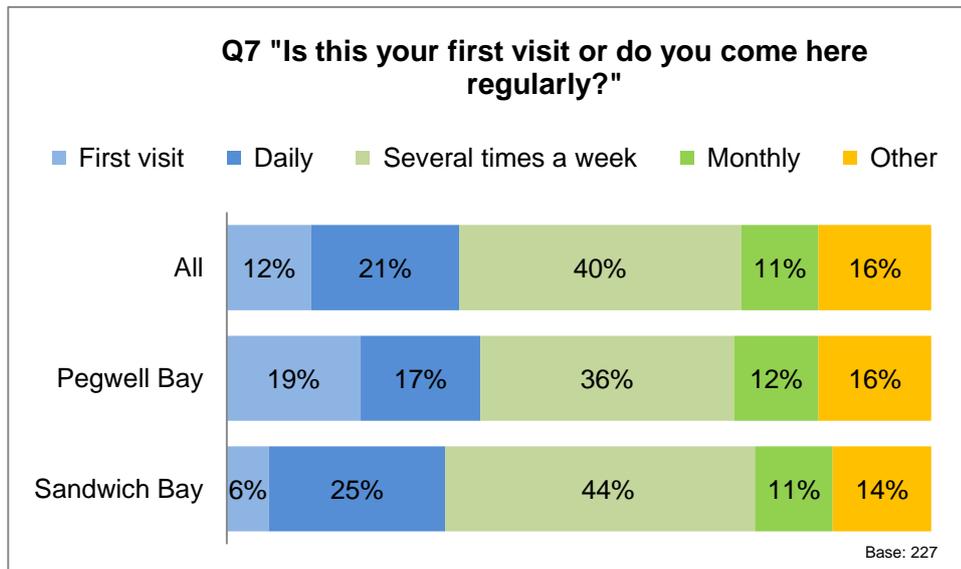
3.17 92% of visitors travel to these sites by car, whilst only 8% walk.

3.18 Whilst the overall figures are comparable to the previous survey results, there may be a change in how visitors travel to Sandwich Bay.

3.19 In 2012, 82% travelled by car to Sandwich Bay, 13% walked, 5% cycled, and 1% travelled by motorbike.

## Frequency of visits

### The overwhelming majority are repeat visitors



3.20 88% of visitors are repeat visitors, with a higher percentage of repeat visitors at Sandwich Bay (94%) compared to Pegwell Bay (81%).

3.21 We have classed those who give an 'other' response as repeat visitors. These visitors give answers to indicate they are repeat visitors, but struggle to define their visits into the categories given to them. 'Other' responses include:

- Every 2 months
- Every 4 months
- Twice a year
- Varies

## Impact of changes to the area

### Very few have noticed any change since the implementation of the Discovery Park Enterprise Zone

3.22 Only 9 visitors (5%) say they have noticed any change since the parks implementation.

3.23 Those who say they have noticed a change were asked what it was they have noticed, with two of the responses shown below.

*“Footpaths on two tidal ponds have had land fenced off and is inaccessible. No access to further lake.”*

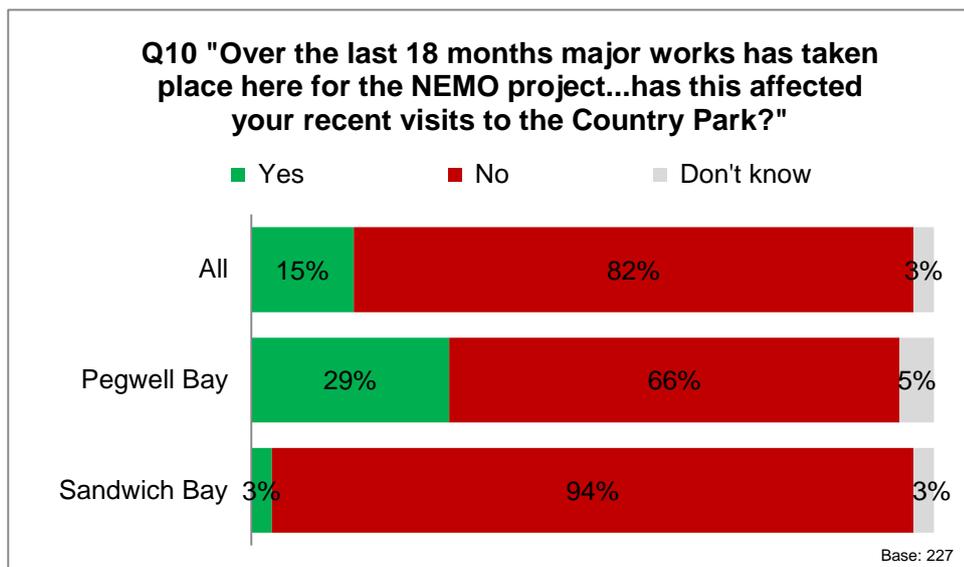
**Male, 45 – 54, Sandwich Bay visitor**

*“Easier to get here now.”*

**Female, 55 – 64, Sandwich Bay visitor**

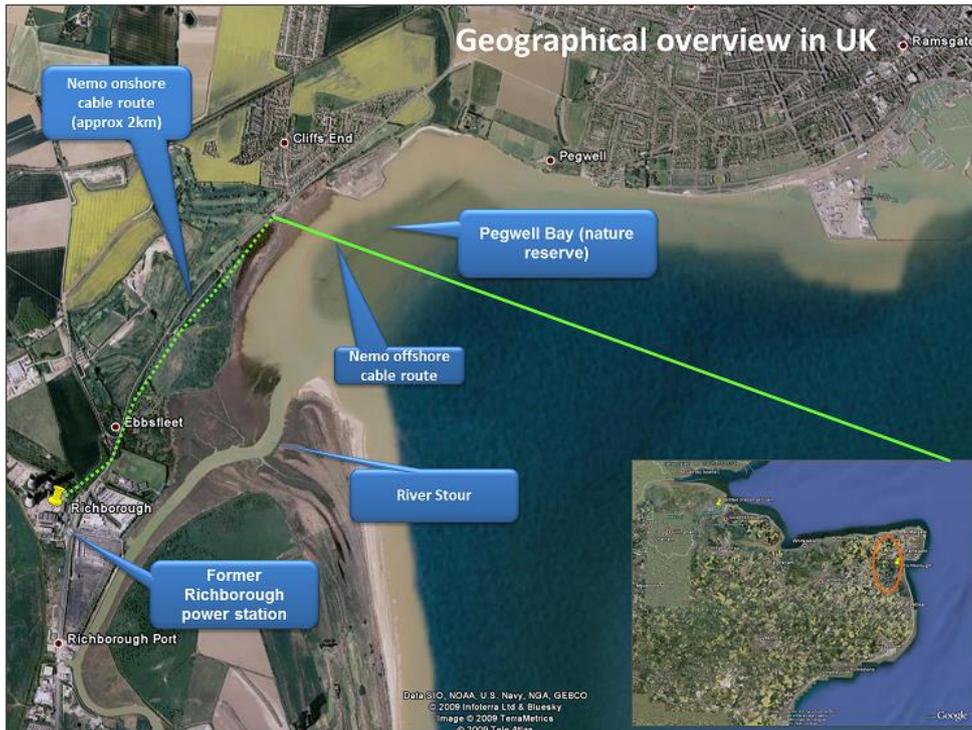
3.24 The same nine respondents were asked if there have been fewer visitors, the same amount, or more visitors (as a result of the changes they have noticed). One respondent says fewer, three say the same, four say more and one respondent is unsure.

### Three in ten visitors to Pegwell Bay say the NEMO project has affected their visit



3.25 Unsurprisingly given the location of the cable route, a higher percentage of visitors to Pegwell Bay than Sandwich Bay say their visit has been affected by the NEMO project (29% and 3% respectively).

3.26 The location of the cable route is shown in the map below<sup>2</sup>:



3.27 Those who say their recent visit has been affected by the NEMO project were asked how.

3.28 Respondents tend to complain about the chalk or mud caused by the construction work, they say that it's an eyesore, or that paths have been closed.

*"Got chalk all over my shoes from the chalk mound surrounding the park."  
Male, 65+, Pegwell Bay visitor*

*"The chalk is a mess, it's like walking around a building site not a Country Park."  
Female, 55 – 64, Pegwell Bay visitor*

*"Signs removed from cycle path route when work started. These have not been replaced."  
Female, 65+, Sandwich Bay visitor*

#### **Most visitors say the cabling will have no long-term effect**

3.29 Around three quarters (76%) say the cabling will not have a long-term effect now that construction has finished and 10% say they don't know. The remainder say there will be a long-term impact (14%).

3.30 The main concerns centre around the chalk and mud caused by its construction and the effect it has had on the landscape.

<sup>2</sup> Source: <http://www.nemo-link.com/the-project/selecting-the-cable-route/>

*"Spoils walking, can't walk on chalk, very messy, when it rains it's sticky."*

**Female, 65+, Pegwell Bay visitor**

*"Mess has been left, not left as it was found."*

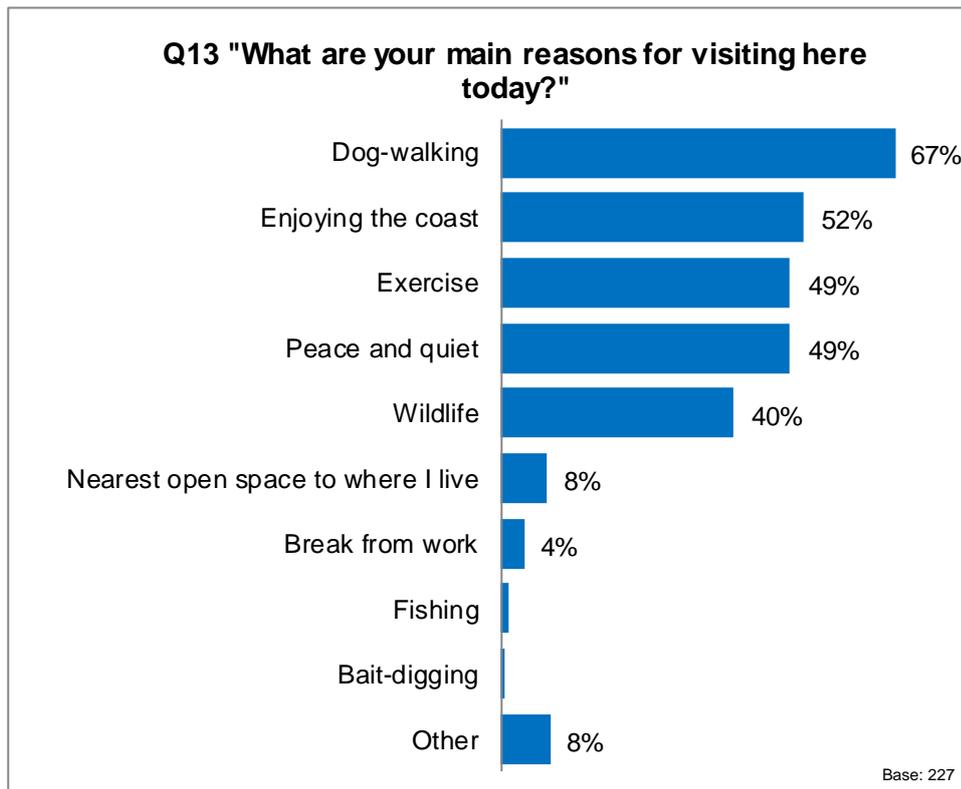
**Female, 55 – 64, Pegwell Bay visitor**

*"Landscape view has changed."*

**Female, 55 – 64, Sandwich Bay visitor**

## Reasons for visiting the sites

### Dog-walking is the main reason for visiting the area



- 3.31 Around two thirds (64%) of visitors to Pegwell Bay visit for dog-walking and seven in ten (70%) visitors to Sandwich Bay visit for dog-walking.
- 3.32 However, the other reasons for visiting differ slightly between the two sites.
- 3.33 Firstly, the percentage of visitors that visit Sandwich Bay to enjoy the coast is higher than Pegwell Bay (56% and 46% respectively).
- 3.34 Secondly, those that visits Pegwell Bay for exercise – 63% – is significantly higher than the proportion that visits Sandwich Bay for the same reason (38%).
- 3.35 Thirdly, the percentage that visit Pegwell Bay to see wildlife (50%) is higher than those visiting Sandwich Bay for the same reason (32%).

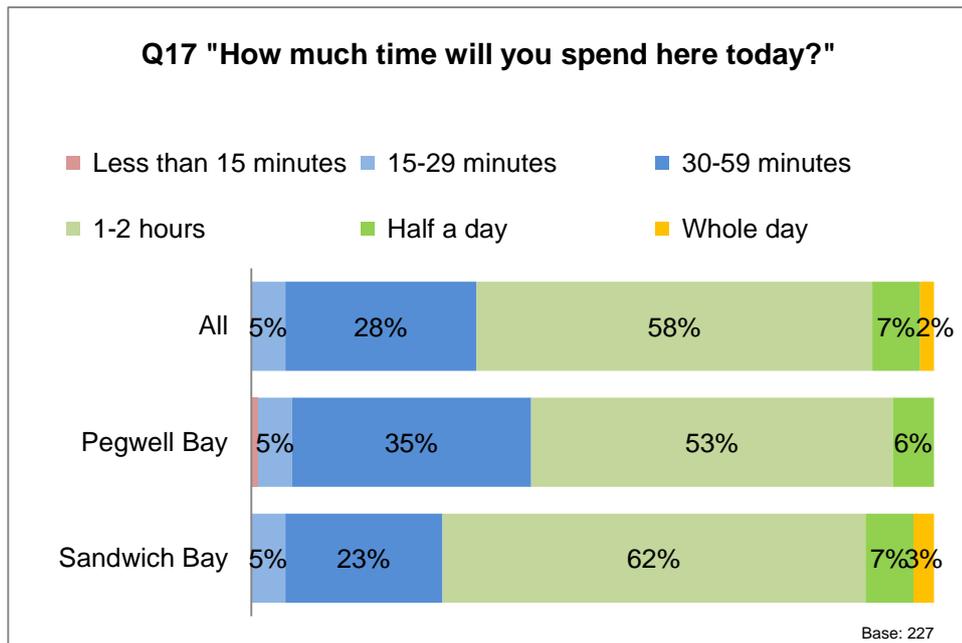
3.36 One of the other most common reasons for visiting is for the peace and quiet (49%). This is similar between both sites – 50% visit for peace and quiet at Pegwell Bay and 49% at Sandwich Bay.

**Regularly used for dog-walking**

3.37 78% of visitors say this is their regular dog-walking area and 92% say they let their dog off the lead here.

3.38 Dog-walkers were also asked where else they go dog-walking. This is an extensive list and as such can be found in the results tabulations in the appendix.

**Visitors spend longer at Sandwich Bay than Pegwell Bay**

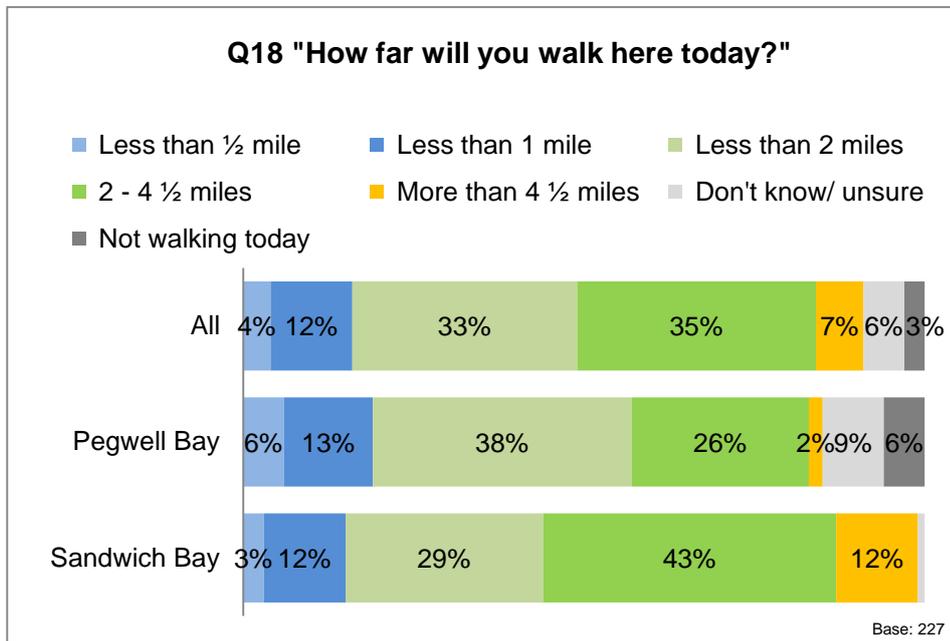


3.39 67% of visitors spend over one hour at these sites, whilst 33% spend less than one hour. In 2012, 51% said they visit for less than one hour.

3.40 A higher proportion of visitors spend an hour or more at Sandwich Bay (72%) than visitors at Pegwell Bay (59%). This was also the case in 2012 where 56% of visitors spent an hour or more at Sandwich Bay, whilst only 45% spent an hour or more at Pegwell Bay.

## Walking

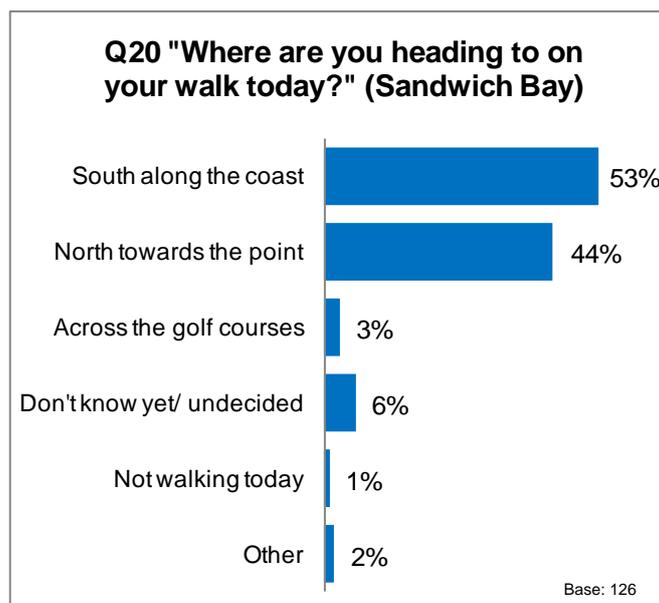
### Visitors are walking further than in 2012



3.41 When asked how far they will walk on their visit, the two most common responses are 'less than 2 miles' (33%) and '2 – 4½ miles' (35%).

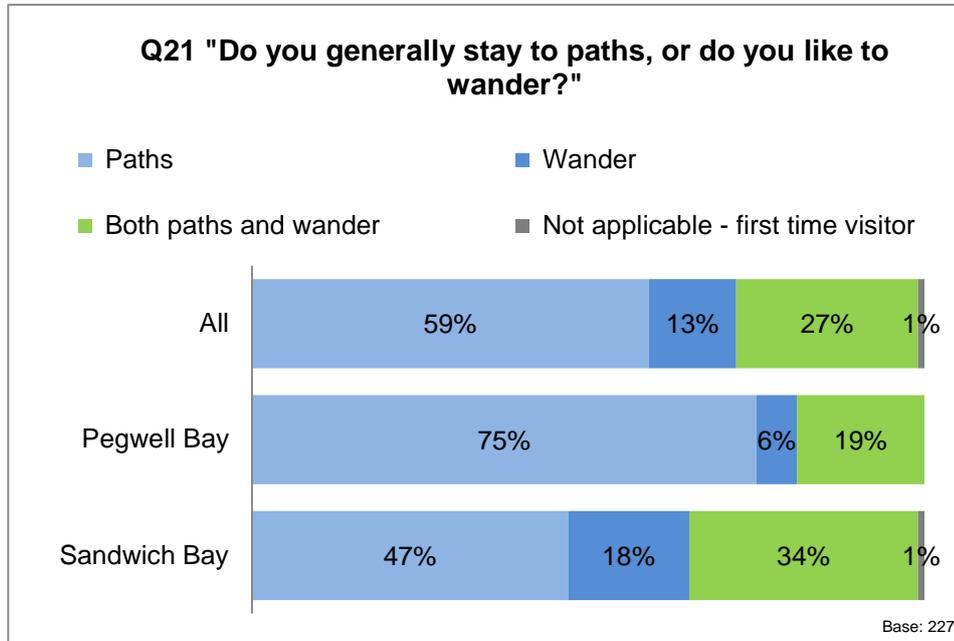
3.42 Whereas the proportion of those walking 'less than 2 miles' is similar to 2012 (37% in 2012, 33% in 2018), the proportion walking '2 – 4½ miles' is higher than in 2012 (24% in 2012, 35% in 2018). There are also slightly more visitors saying they will walk 'more than 4½ miles' (3% in 2012, 7% in 2018).

### Visitors are walking to different points than in 2012



- 3.43 The walking patterns of visitors to Pegwell Bay are similar to those in 2012. However, the walking patterns of visitors to Sandwich Bay are significantly different to those in 2012. In 2012, the vast majority of visitors went north towards the point (80%), whereas this year only 44% walk this route.
- 3.44 Similarly, in 2012 only 5% walked south along the coast, whereas 53% of visitors now walk this route.

**Visitors to Sandwich Bay are more likely to wander away from paths**



- 3.45 This was also the case in 2012, where 57% of visitors to Pegwell Bay stuck to the paths and 44% of visitors to Sandwich Bay stuck to paths.

**Litter, dog mess and mud/chalk put some off from walking**

- 3.46 Visitors were asked if there are any factors that put them off from walking at both sites. 64% say there isn't anything that puts them off, but a third say there is.
- 3.47 The most common themes are litter, dog mess and paths being too muddy, or there being too much chalk (presumably due to the construction):

*"Beach not always clean."*  
**Female, 55 – 64, Sandwich Bay visitor**

*"People not cleaning their dog mess up."*  
**Female, 45 – 54, Sandwich Bay visitor**

*"Messy chalk mound."*  
**Male, 45 – 54, Pegwell Bay visitor**

- 3.48 Other less common themes include poor toilet facilities, dogs and commercial dog walkers, inconsiderate cyclists, horses racing around the area, palm oil on the beach and parking and entry fees.

## Influencing factors when visiting

### **Few say their visit depends on the time of year/ season**

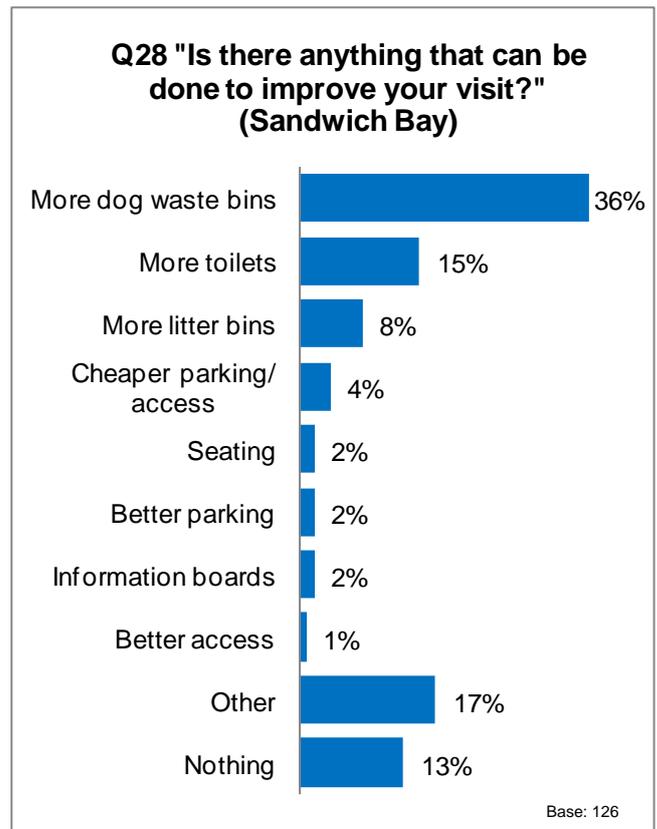
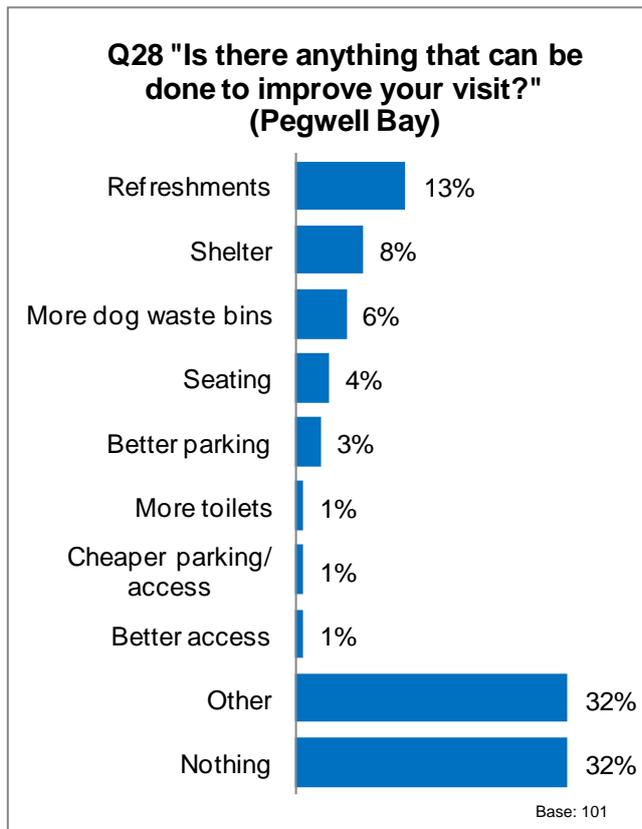
- 3.49 18% of visitors (across both sites) say their visit depends on the season (winter/summer).
- 3.50 23% of visitors to Sandwich Bay say their visit depends on the season, whilst only 10% of visitors to Pegwell Bay say this.
- 3.51 Unsurprisingly, when these visitors are asked if they visit more in summer or winter (across both sites), 83% say summer and 17% say winter.

### **Weather affects only a third of visitors, whilst tide affects very few visitors**

- 3.52 Only a third (33%) of visitors say the weather affects their visit. Nearly all (97%) of these say they visit more in good weather.
- 3.53 Most visitors (88%) say their visit doesn't depend on the tide.
- 3.54 However, the results vary by site. 18% of visitors to Sandwich Bay say their visit depends on the tide, 79% say it doesn't and 3% don't know. Whereas all visitors to Pegwell Bay say their visit doesn't depend on the tide.
- 3.55 For those at Sandwich Bay who say their visit depends on the tide, 18 visitors (86%) say they visit during low tide and 3 visitors (14%) say they visit during high tide.

## Recommended improvements

### Better refreshments at Pegwell Bay and more dog waste bins at Sandwich Bay



3.56 Responses have been split into separate charts as suggested improvements differ between the two.

3.57 The most notable difference is the request for more dog waste bins. This is more of an issue at Sandwich Bay (36%), compared to Pegwell Bay (only 6%).

3.58 The quotes below, taken from question 12 reiterate the points made at question 28.

Pegwell Bay	Sandwich Bay
<i>"Better refreshments area and with cover"</i> Male, 45 – 54, Pegwell Bay visitor	<i>"Dog mess bins and patrols for dog litter"</i> Male, 35 – 44, Sandwich Bay visitor
<i>"Proper café with a shelter"</i> Female, 25 – 34, Pegwell Bay visitor	<i>"Toilets open all year round, near car park"</i> Female, 55 – 64, Sandwich Bay visitor
<i>"Make dog walkers clear up after their dogs, it's disgusting"</i> Female, 25 – 34, Pegwell Bay visitor	<i>"More rubbish bins to keep the area clean"</i> Male, 45 – 54, Sandwich Bay visitor
<i>"More seating on walkways"</i> Male, 45 – 54, Pegwell Bay visitor	<i>"Stop charging people who come down here"</i> Male, 35 – 44, Sandwich Bay visitor

3.59 The 'other' responses at question 28 mainly fall into two categories: better pathways and cleaner/ better toilets. A selection of these 'other' responses are shown below:

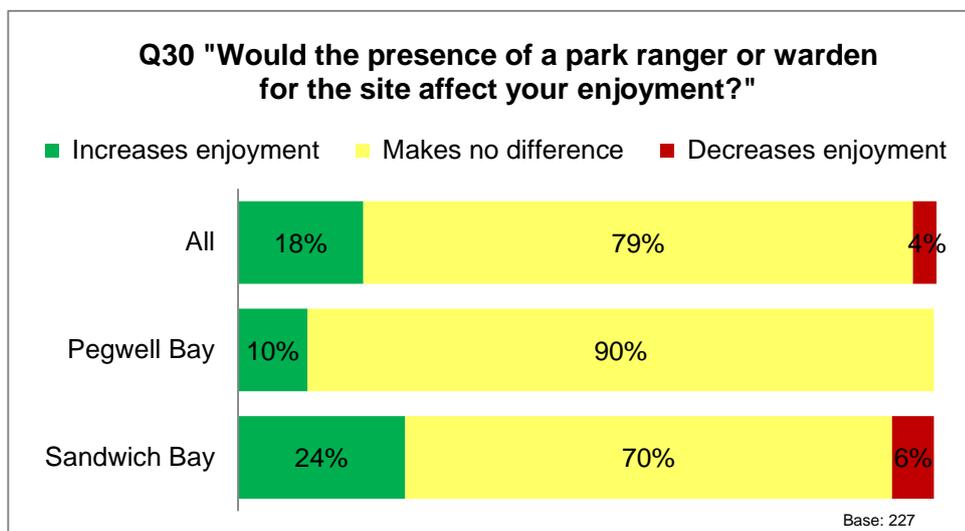
*"Better pathways, less mud."*  
**Male, 16 – 24, Pegwell Bay visitor**

*"Cover the chalk over the cables"*  
**Male, 65+, Pegwell Bay visitor**

*"Proper pathways and less mud"*  
**Male, 65+, Pegwell Bay visitor**

*"Cleaner toilets , they are dirty"*  
**Male, 25 – 34, Pegwell Bay visitor**

### Visitors not bothered over presence of a park ranger



3.60 These results are broadly similar to those from 2012. Previously, 15% of visitors across both sites said a ranger would increase their enjoyment, 80% said it would make no difference, and 5% said it would decrease their enjoyment.

## 4. Key Conclusions

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### **Mess left behind by the NEMO project**

Whilst the majority say the NEMO project hasn't affected their visits, around three in ten say it has. The most common reason is the chalk and mud caused by the construction works. Those who feel they have been affected say their shoes or clothes often get covered in chalk or mud. We don't know if this has, or will, cause some to visit elsewhere instead, but the effects of this should be considered.

However, in terms of the future, it's important to note that very few (14%) say the cabling will have any long-term impact.

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### **Most visit with a dog, but this can cause problems**

70% visit with a dog and around two thirds (67%) give dog-walking as one of their main reasons for visiting. As such, when conducting any changes to the park, stakeholders may want to consider any effect on this core group of visitors.

Given the high percentage of dog-walkers, it comes as no surprise that one of the main complaints throughout the survey is about dog mess, particularly at Sandwich Bay.

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### **Would a warden result in better site maintenance?**

After more dog waste bins, the next most suggested improvements for Sandwich Bay is more toilets and more litter bins. Coupled with the complaints about chalk and mud (mostly from Pegwell Bay), it is clear that some visitors want the sites to be better maintained.

When asked if a park ranger or warden would increase their enjoyment, few (18%) say it would increase their enjoyment, whilst 79% say it would make no difference.

However, 24% of visitors to Sandwich Bay – where dog mess appears to be more of a problem – say a ranger or warden would increase their enjoyment. Future surveys could ask this group why they feel a warden would increase their enjoyment. The inclination may be that this group feel that a warden could help keep the site better maintained.

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### **Reasons for different walking patterns**

Walking patterns at Pegwell Bay are similar to those cited in the survey results from 2012. However, walking patterns for Sandwich Bay appear to have changed. A lower proportion of visitors are walking 'north towards the point' than in 2012, but a higher proportion are walking 'south along the coast'.

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