

# Cross Channel Tourism Study

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Régional de Tourisme Nord Pas de Calais

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# 1 Introduction

Kent County Council and Comité Régional de Tourisme Nord Pas de Calais commissioned Arkenford to conduct a study of passengers crossing the channel between Dover/Folkestone and Calais titled 'Cross Channel Tourism Study' in April 2005. This research is being conducted as part of a 2 year EU Interreg research programme known as 'Information for Decisions'. The programme was developed between the 2 partners to develop complementary strategies and products on a European scale (which includes the Transmanche region) and was steered by a partnership of public and private sector organisations. Cross Channel partners who took part in the study include Port of Dover, Eurotunnel, P&O and SeaFrance. They are part of the technical group and have received individual reports for their own companies.

## 1.1 Research Objectives

The main aim of the study is to:

- Develop understanding of Cross Channel passengers so the visitor market can be developed in a sustainable and profitable way.
- Understand passenger motivation and satisfaction as well as the whole passenger decision making process from inception to fulfilment for insight into the attraction of more passengers, higher levels of repeat bookings and encouraging short breaks to both Kent and Nord Pas de Calais (NPdC).
- Gain an insight into why some users do not use Cross Channel Operators in order to identify threats and opportunities within the market place.

A similar study was conducted in 1999/2000 and this study is intended to build on those findings. As a result, the methodology used in this latest study replicates that of the study conducted five years ago.

Since the previous study a number of events have impacted significantly on the tourism industry, specifically Foot and Mouth, September 11<sup>th</sup>, SARS, War on Terrorism and heightened security. A further blow was felt on July 7<sup>th</sup> 2005 with the Terrorist bombing of public transport services in London.

Further changes having both a positive and negative impact on the Cross Channel market include the introduction of the Euro, new Cross Channel Operators including low cost carriers, the long term effect of the abolition of duty free and tobacco tax, fluctuating exchange rates, the introduction of low cost airlines and an increase in personal internet access.

There is also an ever growing set of competing low cost overseas tourism destinations and travel options, strong competition from accommodation and package suppliers and increased ease of local 'on the spot' car hire.

The study also seeks to address these issues drawing from key research data from all 3 stages of the research process, in particular discussing:

- The impact of these changes on the Cross Channel passenger market
- The now established role of the internet in the decision making and booking process.

- Heightened awareness of cultural events (e.g. Lille 2004) and related increased motivation to cross the Channel.

## 1.2 Research Methodology

The research consisted of three phases covering different methodologies and aims.

The first stage consisted of self completion questionnaires that were used to get a profile of the passengers crossing the Channel. This stage collected the general profile of passengers covering age, group composition, mode of travel, origin and destination. There were two types of interview process used in the first stage; interviews and self administered questionnaires. Interviewers went onboard the ferries or at the departure terminal for Eurotunnel and handed out the self completion questionnaires and collected them in from passengers. SeaFrance and Eurotunnel used their staff to hand out questionnaires to passengers on crossings without any interviewers. Passengers could hand the questionnaires in or use a freepost address to return the questionnaires. Sample frames were devised using times of the day and days of the week to ensure a balanced profile across the year.

The second phase used telephone research to get a deeper understanding of what travellers were doing in each of the two regions. Respondents were asked in the stage one questionnaire whether they would be willing to take part in further research and those who accepted were put forward to the contact list for the stage two research. Respondents were asked in greater detail about their cross Channel trip including where they stopped en route, motivations for visiting Kent or Nord-Pas de Calais, if they visited, where they went and what they did. People who did not stop were asked about their reasons for not visiting and ideas about what could make them stop in the future.

The final stage involved focus groups covering specific sections of the cross Channel market as well as non users to get a deeper understanding of their opinions and motivations. Six groups were held in the UK and two in France in order to keep the number of groups representative of the overall market. Specific groups were held with campervan users, low cost airline users and people that had stopped or transited the two regions. In addition to the focus groups, five depth telephone interviews were also conducted among coach operators as part of the final stage as it was felt that this specific section of the market was missing from other areas of the research.

The International Passenger Survey and figures provided by the Port of Dover and Eurotunnel were used for market sizing purposes. Figures quoted will use the term 'trips' and 'passengers' in the report. 'Trips' assumes a return journey, i.e. someone leaving the UK and going to France assumes they will return to the UK and hence this is one trip. 'Passengers' is a term used primarily by cross channel carriers and someone leaving the UK on a ferry is one passenger. That person can spend some time in France and come back on the ferry where they are again counted as one passenger so the ferry company has a count of two passengers but it is only one trip. The market size figures are based on the IPS figures and doubling these will give a good indication of the number of passengers although there will be a small number of people who do one-way trips that will cause the figures not to match exactly. The previous report used 'trips' as their volume, so for consistency the same definition is used in this report.

Full details of the methodology and development of each stage can be found in appendix 3.

## 2 Summary of Research Findings

### 2.1 Travel Volumes

According to the International Passenger Survey, **14m** trips were taken across the channel in 2004 covering the Eurotunnel, Eurostar and Dover ferry routes.

The Cross Channel market between Kent and Nord-Pas de Calais has **declined by 2m trips** since 1999, mainly as a result of a decline in the market using the tunnel.

The figures from this point forward relate to the primary research that was conducted for this project. They include the ferry and Eurotunnel routes but do not include the Eurostar routes. Any figures quoting the IPS will have Eurostar figures included.

92% of trips originating in the UK using the Channel crossings are bound for France, Belgium, Germany or the Netherlands and 75% of trips to the UK using the Channel crossing are from these four countries.

**55% (8.1m) of all trips between the UK and France come via the Kent and Nord-Pas de Calais sea or tunnel routes and 70% of all trips between the UK and Belgium come via these routes.**

37% (5.2m) of cross channel trips have their final destination as Nord-Pas de Calais, 4% (0.5m) as Kent and 60% (8.4m) somewhere else.

**80% (11.2m) of cross channel trips originate in the UK**, 6% (0.8m) in France, 3% (0.4m) in Belgium, 3% (0.4m) in Germany and 2% (0.2m) in the Netherlands.

**50% (5.6m) of the UK outbound trips originate in counties close to the Channel crossing points** and Kent accounts for 17% (1.9m) of the UK origin regions. It is a similar picture in France with 55% (0.4m) originating in Nord-Pas de Calais or Ile de France.

Nord-Pas de Calais is the most popular French destination region accounting for 52% of all the trips to France. This increases to **97% for day trips** and 55% for short breaks (1-3 nights). The **regions in the south of France are more popular for longer duration trips** accounting for 28% of these trips compared to 11% for Nord-Pas de Calais.

Kent is the most popular destination region in the UK for day trips using the Kent Channel crossing accounting for 57% and London is the most popular for short breaks (1-3 nights) accounting for 30%. Longer duration trips are spread out across the country but London, Kent & Cornwall are popular destinations.

### 2.2 Patterns of Travel

Trips of 4 nights or more account for 47% (6.6m) of the cross Channel volume. Day trips are the next most popular duration at 30% (4.2m) of the volume. The proportion of day trips has declined and longer holidays has increased since the last survey in 2000. Travellers on a longer duration trip are less likely to stop in Nord-Pas de Calais than day trippers and this has contributed to the downturn in visitor numbers.

The average group size has increased slightly from 2.8 persons to 3.0 persons over the past 5 years.

Main purpose of trips is for leisure/ holiday (74%). The **continental Europeans are more likely than the British to be crossing the Channel to visit friends or family** or for business purposes. **Travellers stopping in Nord-Pas de Calais for up to one day are twice as likely to be travelling for the purposes of shopping** than other travellers.

ArkLeisure is a value based segmentation designed by Arkenford and used extensively in the leisure & tourism industry. It goes beyond the traditional socio-economic & postcode classification segmentations and looks at peoples motivations and attitudes to buying leisure products. It takes into account an individuals lifestage and group composition for leisure activities as a trip away as a couple will undoubtedly have different requirements to a trip away with the family. The ArkLeisure model has eight segments. Full details of the model can be found in Chapter 4.3 and segment descriptions can be found in Appendix 9.

The ArkLeisure segment 'Functionals' make up the largest proportion (29%/ 4m) of all travellers crossing the Channel. This group is price sensitive, self reliant, who tend to be among the last to adopt new ideas or products.

Cosmopolitans make up the next largest ArkLeisure group (21%/ 2.9m). These are active, confident people who like to try new things and travel frequently. Their great propensity to travel makes them a common part of any tourist market.

Staying with friends or relatives is the most common form of accommodation for the continental Europeans visiting Kent, partly due to the perceived high cost and low quality of accommodation in the UK. Hotels or motels are the most common for UK visitors to Nord-Pas de Calais.

Motivations for a short break generally stem from a desire to have a change from the normal routine of everyday life. Travelling to a different country where the food, money, shops, and scenery are different can provide this change of scene. Kent or Nord-Pas de Calais can provide this very different culture that short break visitors desire without the need for a long trip.

**Awareness of the regions among the public at large is generally low**, and this can cause poor perceptions among potential visitors. Low awareness tends to create negative perceptions of the areas and a general opinion that there is nothing there to attract visitors. People with little awareness of Nord-Pas de Calais tend to focus their perception on the town of Calais and its industrial port. Those with the greatest level of awareness have the best impression of the areas and know that outside of the arrival ports there is some very attractive towns and countryside.

**The main attraction of Nord-Pas de Calais as a place to visit is the shopping around Calais, particularly Cite Europe.** Having a meal in the area is also a popular activity. These two activities accounted for 77% and 71% of visitors respectively.

The hypermarkets and restaurants are the most motivating factors attracting visitors to Nord-Pas de Calais. In addition to these factors the countryside and history of the region are motivating factors for staying visitors.

Spend is high on shopping for visitors to Nord-Pas de Calais. 50% are spending more than £200/€300 during their visit.

**The main attractions of Kent are the countryside, the history of the region and the coast.** Visitors are looking for a peaceful and relaxing time, which is why the countryside appeals.

Many visitors to Kent are staying in the region to visit friends or family, especially if they are continental European visitors, or because it is convenient for catching a train or ferry to cross the Channel.

17% of non UK visitors to Kent are visiting attractions in the region. Most will have a meal, visit family or friends, or go shopping.

Spend is relatively low for visitors to Kent. The UK visitors are generally spending a short time before crossing the Channel so spend money on a meal. Many non UK visitors are staying with family or friends and seem to be fairly inactive so are not spending much money. The UK in general is also considered to be expensive for visitors.

Marketing literature helps to improve the perception people have of the 2 regions but at the present time it would have to pro-actively be sent to potential visitors because the low awareness means that few people, unprompted, consider these regions as potential holiday destinations.

## 3 The Cross Channel Market in 2005/06

### 3.1 Size of the Market

There are numerous methods and routes to cross the Channel covering trains, ferries and aircraft. According to the IPS, there were 70.9 million trips between the UK and Europe in 2004 covering all routes and modes of transport. Air travel accounts for 50.8m trips (72%) with sea and tunnel routes accounting for the remaining 28%.

Air travel routes between the UK and Europe are too numerous to show with any clarity on a map because of the number of airlines operating services. Most of the national carriers operate services between the UK and continental Europe (e.g. British Airways, Air France, KLM, Lufthansa and Iberia) and many are adopting a low cost pricing structure of single leg fares and cheapest prices booked weeks ahead of travel. In addition to these there are numerous low cost airlines (e.g. Easyjet, Ryanair and Flybe) that all have routes between the UK and France, Spain, Holland, Italy and Germany. These airlines in particular have opened up local departure points for many people outside of the main London airport catchment areas. Departure points served by these carriers include Southampton, Bristol, Exeter, East Midlands, Liverpool, Newcastle, Norwich, Edinburgh and Glasgow.

When looking at the counties that border the Channel the importance of the sea and tunnel routes increases significantly. 68% of all trips between the UK and France (10.1m) used sea and tunnel routes. This is broken down as 55% (8.2m) using the Kent-Nord-Pas de Calais routes and 13% (1.9m) using other ferry routes (e.g. Portsmouth). This highlights Dover's importance as the UK's busiest port.

Market sizing data for this project has been calculated using data obtained from the 2004 International Passenger Survey (IPS) and data provided by the Port of Dover and Eurotunnel.

Port of Dover and Eurotunnel data is the more reliable source, as the IPS is based on a sample of approx 2% of travellers, whereas the data from Dover and Eurotunnel is based on actual passengers carried.

As the figures from Dover and Eurotunnel count each passenger journey (outbound and return), these figures have been halved to represent the number of trips. This is based on the assumption that someone travelling on their outbound journey by ferry will return by ferry. IPS figures have been quoted as these are available for historical trend analysis and provide a breakdown by the mode of crossing for the current year.

**11m** trips were taken across the channel between Kent and Nord-Pas de Calais using the ferries or Eurotunnel. When the Eurostar is taken into account the figure increases to **14m** trips. The following table outlines the number of trips taken by each mode of transport using the Kent to Nord-Pas de Calais crossing points and the proportion of UK vs. Continental European origins.

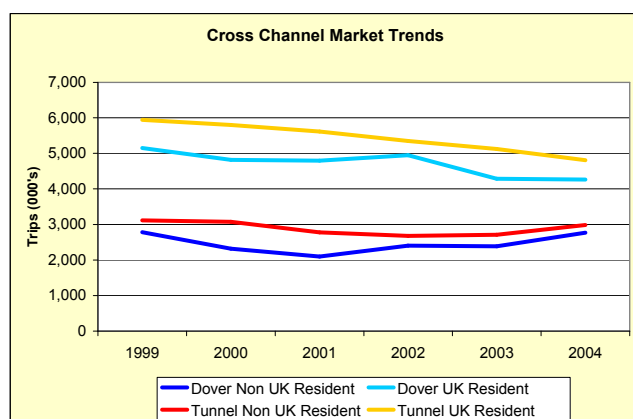
**Table 3.1. Volume of Kent-Nord-Pas de Calais trips by mode with residential proportions**

**Cross Channel Volume by Mode**

	2004	UK Resident	Continental European Resident
Ferry	6,881,841	63%	37%
EuroTunnel	4,111,199	72%	28%
Eurostar	3,084,341	59%	41%
<b>Total</b>	<b>14,077,381</b>	<b>65%</b>	<b>35%</b>

Source: IPS 2004

Using the IPS data for the past five years it can be seen that between 1999 and 2004 the market has declined by 12.7% (-2m trips). This decline is mainly as a result of a decline in use of the Channel Tunnel but the IPS data does not give a breakdown between Eurotunnel and Eurostar use. Most of the decline appears to be from a fall in UK residents' use of the crossing. The following chart illustrates this decline.

**Figure 3.1. Volume of Kent-Nord Pas de Calais trips 1999-2004**

Source: IPS

The figures for the past five years can be found in appendix 7.

Some of the profile changes over the past five can explain some of the decline. There are less business passengers travelling by Eurotunnel and an increase in leisure proportions. The proportion of passengers travelling for shopping purposes has also declined over the past five years. People travelling for shopping or business tend to be more frequent Cross Channel travellers and when the frequency figures were examined they reveal that people are still crossing the Channel but less frequently than they used to by sea or tunnel.

**Table 3.2: Profile of Tunnel & Ferry passengers 1999 vs. 2006**

	1999 EuroTunnel	2006 EuroTunnel	1999 Ferry	2006 Ferry
Business	22%	15%	10%	9%
Visit friends / family	9%	11%	8%	13%
A meal	2%	2%	1%	1%
Sporting/ Cultural Event	2%	6%	3%	5%
Leisure	37%	41%	56%	48%
Shopping on board / at terminal	2%	1%	2%	2%
Shopping on land for alcohol/tobacco	18%	13%	10%	12%
Other shopping on land	5%	5%	2%	4%
Visit second home / property	2%	5%	2%	4%
Study / language school	1%	0%	3%	1%
Other	1%	1%	2%	2%
	100%	100%	100%	100%

	1999	2006	1999	2006
	EuroTunnel	EuroTunnel	Ferry	Ferry
Adults aged... 16-24	5%	7%	11%	12%
Adults aged... 25-34	15%	10%	15%	10%
Adults aged... 35-44	21%	19%	18%	15%
Adults aged... 45-54	25%	20%	20%	17%
Adults aged... 55-64	14%	19%	14%	19%
Adults aged... 65+	8%	11%	9%	9%
Children aged... 0-5	4%	4%	3%	3%
Children aged... 6-10	4%	5%	4%	4%
Children aged... 11-15	4%	6%	6%	10%
	100%	100%	100%	100%
	1999	2006	1999	2006
	EuroTunnel	EuroTunnel	Ferry	Ferry
Avg Number of Trips by Sea & Tunnel	5.8	3.6	4.4	3.1

**Base: All Stage 1 Ferry & EuroTunnel Respondents**

The number of trips by UK residents is increasing so this suggests that other modes of transport are increasing in popularity. The number of trips made by air has increased, especially for independently arranged holidays. The impact of low cost airlines and national airlines competing with these carriers has opened up new destinations from regional airports at affordable prices.

The evidence suggests that the choice for consumers has opened up in terms of who they travel with across the channel and where they can go. As local departure points are a real benefit for travellers, airports to the North of London (Stansted & Luton) are likely to be attracting passengers who may previously have taken the train to cross the Channel.

The following tables highlights the main countries visited for UK residents and the main countries of origin for continental European residents using the Kent to Nord-Pas de Calais routes.

**Table 3.3: Top 10 destination countries for UK residents using the Kent-Nord-Pas de Calais Channel crossings**

Destination	UK residents				
	Ferry	EuroTunnel	Eurostar	Total	% of Total
France	2,842,795	2,107,270	1,426,927	6,376,993	70%
Belgium	486,424	434,231	330,407	1,251,062	14%
Germany	292,538	168,843	14,725	476,106	5%
Netherlands	133,741	99,236	15,593	248,571	3%
Austria	194,768	23,302	3,529	221,598	2%
Spain, Balearic Islands	164,528	45,588	4,532	214,648	2%
Italy	74,715	37,062	11,514	123,291	1%
Switzerland	59,216	22,503	11,068	92,786	1%
Poland	36,392	7,024	716	44,132	0%
Luxembourg	17,621	23,462	1,800	42,884	0%

Source: IPS 2004

**Table 3.4: Top 10 origin countries for Non-UK residents using the Kent-Nord-Pas de Calais Channel crossings**

Country of origin	Continental European Residents				
	Ferry	EuroTunnel	Eurostar	Total	% of Total
France	594,416	313,601	909,286	1,817,302	37%
Belgium	331,791	220,201	258,300	810,292	16%
Germany	609,299	122,982	13,660	745,941	15%
Netherlands	187,752	133,357	27,277	348,386	7%
Poland	206,759	68,730	2,279	277,768	6%
Italy	116,320	36,552	8,036	160,908	3%
The Czech State	103,164	41,749	479	145,392	3%
Spain, Balearic Islands	55,472	64,360	4,653	124,485	3%
Hungary	54,998	30,822	1,108	86,929	2%
Irish Republic	28,759	15,485	5,096	49,339	1%

Source: IPS 2004

France is naturally the most popular destination for people using the Kent-Nord-Pas de Calais routes followed by Belgium. These two destination countries have direct access to the trains or ferries crossing the Channel.

It is the same for continental Europeans entering the UK; the countries with direct access account for most of the passengers followed by those countries close to the Channel crossing.

Using the 4 main markets in the table above, the proportion of trips between the UK and these countries using the Kent to Nord-Pas de Calais routes can be identified.

**Table 3.5: Top 4 markets by volume proportion of trips by UK residents using the Kent-Nord-Pas de Calais crossings by destination country**

	Outbound UK		
	All traffic (any mode, any departure point)	Traffic via Kent/ NPdC sea & tunnel routes	% of traffic using Kent/ NPdC routes
France	11,586,094	6,376,993	55%
Belgium	1,799,081	1,251,062	70%
Germany	2,336,368	476,106	20%
Netherlands	2,165,086	248,571	11%

Source: IPS 2004

**Table 3.6: Top 4 markets by volume proportion of Non-UK residents trips to the UK using the Kent-Nord-Pas de Calais crossings by country of origin**

	Inbound UK		
	All traffic (any mode, any arrival point)	Traffic via Kent/ NPdC sea & tunnel routes	% of traffic using Kent/ NPdC routes
France	3,378,828	1,817,302	54%
Belgium	1,131,430	810,292	72%
Germany	3,134,169	745,941	24%
Netherlands	1,676,216	348,386	21%

Source: IPS 2004

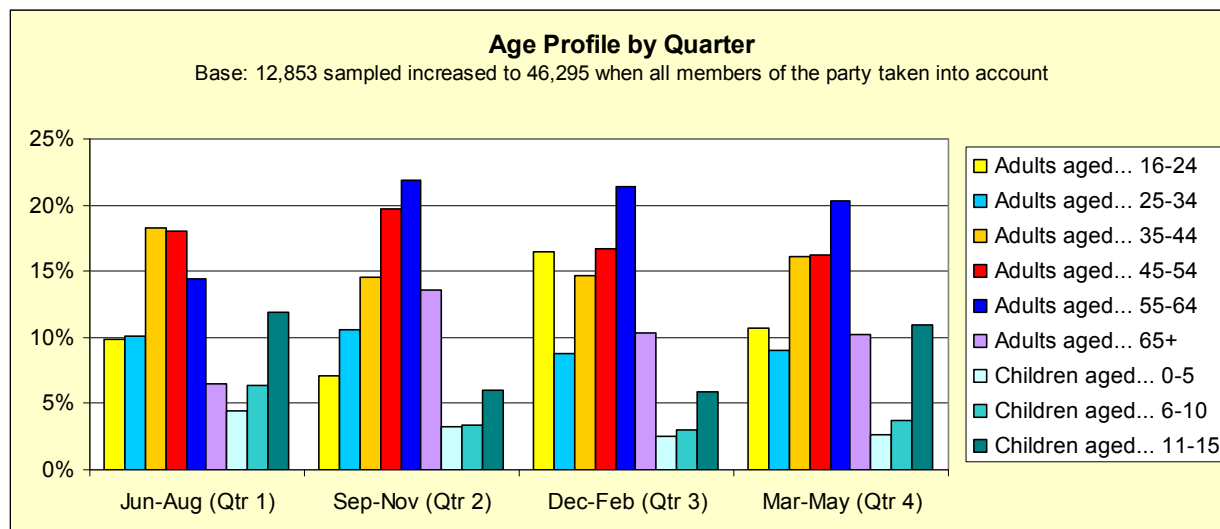
Of all trips by UK residents to France 55% (6.3m) of them use the Kent-Nord-Pas de Calais route and for trips to Belgium 70% (1.2m) use the same route. Similar proportions are observed by non-residents of the UK entering from France and Belgium. Countries without the direct access to Channel crossing show a marked decline in the proportion of traffic to and from that country that uses the Kent-Nord-Pas de Calais crossing.

## 4 Passenger Profile

### 4.1 Age

In terms of the age profile of the passengers crossing the Channel, 83% of them are adults over the age of 16. The higher proportion of families travelling in the summer months can be seen in the age profile when it is examined by quarter. This is not unexpected as the majority of family holidays are taken in the main school holiday period over the summer.

**Figure 4.1: Age profile by quarter**



The peak winter sports months see the highest proportion of 16-24 year olds crossing the Channel.

There tends to be a more mature profile outside of the summer holiday months. 47% (5.2m) of UK travellers and 44% (0.3m) of French travellers are 45 years or older. The Germans and Belgians have a slightly younger profile with less over 55 year olds in their profile.

The age profile of respondents is getting older. The proportion of over 55 year olds has increased by 6 percentage points over the past five years at the expense of the 25-54 year olds.

Some of this can be linked to the segments that people fall into. The cross channel market attracts Functionals and Habituals (a detailed description is available in a subsequent section) who are less inclined to try new things. Habituals especially are the sort of people who do the same things they always have. These people were probably crossing the Channel five years ago and are still doing it now. Another factor is that the population in general is getting older.

The British and the French have an older age profile than the other nationalities crossing the Channel. The French, Dutch and Germans are more likely to be visiting friends or relatives and are likely to be travelling as family groups and it would appear that it is mainly older children that are likely to be travelling with the French and Germans.

**Table 4.1: Age by Country of Origin**

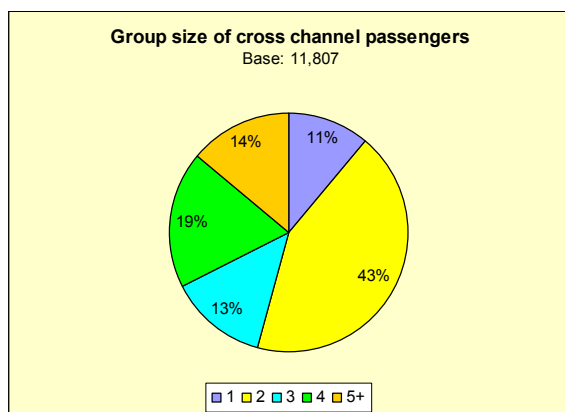
	UK	France	Belgium	Netherlands	Germany	2006	2000
Base	36,100	3,545	1,054	1,242	1,397	46,295	40,815
Adults aged... 16-24	10%	11%	15%	8%	8%	11%	9%
Adults aged... 25-34	9%	10%	16%	8%	9%	10%	15%
Adults aged... 35-44	16%	12%	21%	16%	21%	16%	19%
Adults aged... 45-54	18%	16%	22%	17%	22%	18%	22%
Adults aged... 55-64	19%	18%	8%	28%	9%	19%	14%
Adults aged... 65+	10%	10%	5%	8%	3%	10%	8%
Children aged... 0-5	3%	3%	3%	4%	5%	3%	4%
Children aged... 6-10	5%	3%	5%	4%	5%	4%	4%
Children aged... 11-15	9%	16%	4%	7%	19%	9%	5%
	100%	100%	100%	100%	100%	100%	100%

**Base: All respondents – Stage 1**

## 4.2 Group Composition

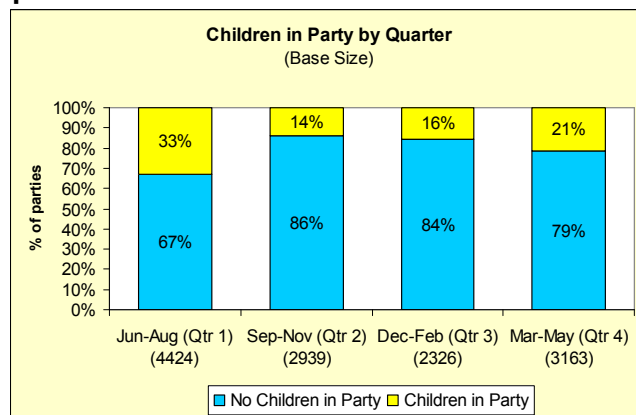
The most common group composition is a couple. Family groups increase in the summer months, which is commonly when families with school age children tend to go on holiday. Respondents stopping in Nord-Pas de Calais for up to one day are less likely to be travelling with children. This is somewhat driven by the purpose of stopping in Nord-Pas de Calais, which tends to be for alcohol and tobacco purchases and is unlikely to hold the interest of children.

**Figure 4.2: Group size of cross channel parties**



**Source: Stage 1 – All respondents**

**Figure 4.3: % of parties containing children by quarter**



In the winter and spring there is a higher proportion of adults only groups compared to 5 years ago. Family groups have declined in all quarters except the summer quarter when there is a noticeable increase. This is the time when people travel further and are less likely to stop in Kent or Nord-Pas de Calais because they want to get to their final destination. Nord-Pas de Calais appears to be a destination that children are unlikely to be taken to. Given that the region is renowned for its alcohol and tobacco shopping this is to be expected; parents are unlikely to want to take their children away on a trip to buy alcohol. It is more likely that parties travelling from continental Europe to the UK will have children in them compared to UK parties going to continental Europe. This can be partly explained by the volume of visiting friends and family traffic there is inbound to the UK.

**Table 4.2: Group composition changes over the past 5 years**

Group Composition	Total			Stopping in NPdC			Time of Year											
			Var			Var	Qtr 1 (Jun-Aug)			Qtr 2 (Sep-Nov)			Qtr 3 (Dec-Feb)			Qtr 4 (Mar-May)		
	2006	2000		2006	2000		2006	2000	Var	2006	2000	Var	2006	2000	Var	2006	2000	Var
Single adult	11%	14%	-30%	7%	8%	-23%	10%	12%	-19%	13%	15%	-17%	12%	17%	-44%	10%	15%	-39%
Couple	42%	43%	-2%	48%	47%	2%	36%	40%	-12%	50%	49%	1%	46%	43%	7%	41%	40%	5%
Adults with children	24%	24%	1%	18%	30%	-67%	35%	21%	41%	14%	23%	-61%	17%	26%	-49%	23%	27%	-19%
Adult group	23%	19%	17%	27%	14%	47%	19%	28%	-42%	23%	13%	45%	25%	14%	42%	25%	19%	26%
Total	100%	100%		100%	100%		100%	100%		100%	100%		100%	100%		100%	100%	

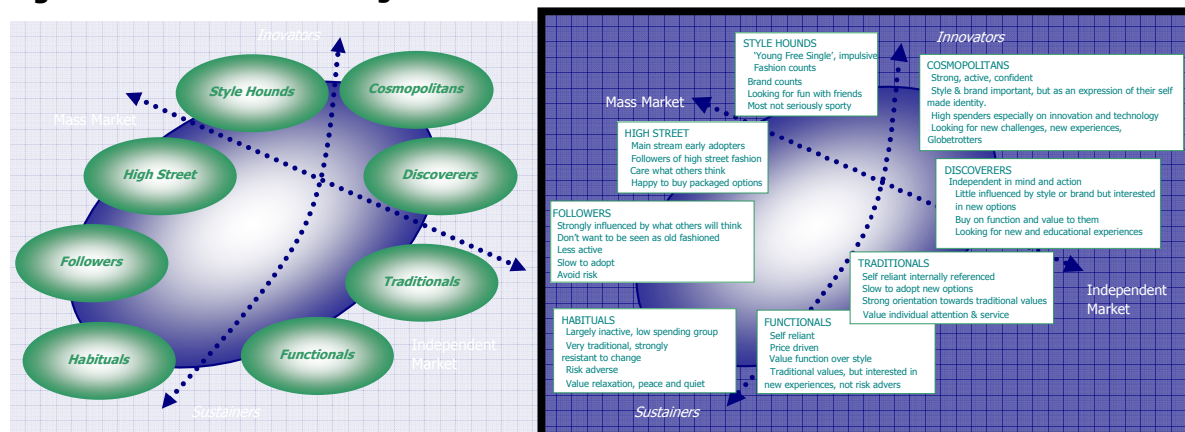
**Base: All Respondents – Stage 1 (11,760 in 2006; 14,680 in 2000)**

### 4.3 ArkLeisure Segments

ArkLeisure is a market segmentation designed specifically for the travel and leisure market and is based on people’s values and willingness to pay for leisure services.

The ArkLeisure model consists of 8 segments based around 2 key dimensions – how independent their outlook is and how innovative they are. The model is outlined below.

**Figure 4.4: The ArkLeisure Segmentation Model**

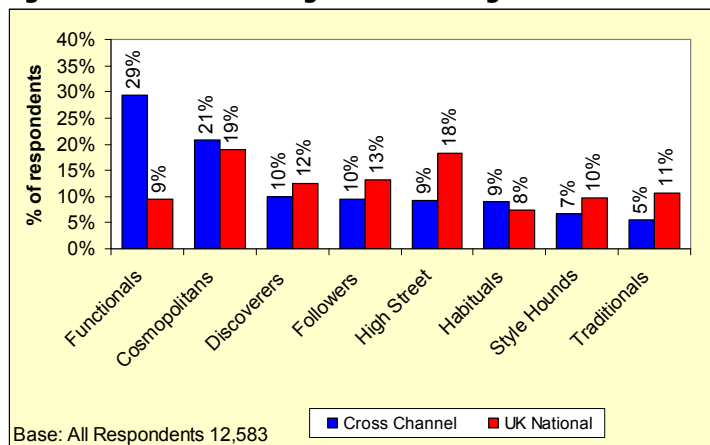


The left side of the diagram are more orientated towards the 'mass market' which means that they are externally referenced. These people are more likely to be influenced by fashion, media and their peers' opinions. On the other side, the 'independent market' is more internally referenced so they will be more likely to make up their own mind about places.

At the top of the diagram are the 'innovators'. These are groups that embrace new technology and experiences and are generally the first to adopt new trends. The further down the diagram one heads the segments become less innovative and more likely to follow rather than create new markets. At the bottom of the diagram are 'sustainers' who know what they like and stick to it.

There are 2 dominant segments among passengers crossing the Channel – Functionals and Cosmopolitans. These 2 segments account for 50% of the passengers.

The following chart highlights the importance of each of the segments in the profile of cross Channel passengers.

**Figure 4.5: ArkLeisure segments crossing the Channel compared to the UK National picture**

### 4.3.1 Functionals

#### **Outlook:**

- Functionals are very resistant to spending and appear pretty self reliant.
- They are very price driven and value functionality strongly over style.
- They are very traditional in their values, and are not prepared to pay for fashion, style or 'individuality'.
- Service is something that they expect as opposed to something they will pay extra for.
- Whilst they are not early adopters they are interested in new experiences, and are happy to try things that are new to them.
- They also enjoy intellectual challenges, arts and culture.

This segment represents a small proportion of the UK population (9%), with the majority (63%) being over 45 years of age and with average levels of income.

#### **Interests & Activities:**

- **Personal interests** – DIY, gardening, arts & culture.
- **Days out and attractions** – Interested in heritage attractions. Seeking a nostalgic and somewhat educational experience.
- **Shopping** – Higher propensity to use the lower cost supermarkets e.g. co-op. Budget clothes shops are used and a low amount spent on clothes purchases.
- **Eating & drinking** – Lower propensity to eat and drink out compared to other segments. Price & functionality is important. Social clubs or Weatherspoons pubs are favoured drinking establishments (because of their price sensitive nature).
- **Nights out** – Most likely to be a trip to the cinema or a trip to the theatre.
- **Media** – Mail & Telegraph are the most popular newspapers. Lowest proportion of all segments owning satellite/ cable TV. Into news, films and comedy.
- **Holidays** – Most likely to choose a specialist operator or an independent holiday company. Unlikely to use a dedicated internet holiday company but quite likely to book accommodation online & arrange travel themselves. Low frequency of holiday taking and most likely to do a short break in the UK and a longer holiday overseas.

The main motivation that is driving this group across the Channel is a very price focused one. They are being motivated by the opportunity to stock up on cheap grocery shopping. The trip to France meets their functional needs and they can save money by taking their car or van and buying a few months supply of groceries. This group is likely to be one that

does a regular trip for the same purpose and likely to book the cheapest fares or take advantage of the cheap offers in newspapers.

Being independently minded they are less likely than some segments to be swayed by advertising. They are into arts and culture as a group so this could be a good avenue to get them to stay longer in Nord-Pas de Calais, especially if they knew of arts or cultural events well in advance so they could tie it in with the cheap fares for their shopping trips.

Comparing the profile and motivations against the other ArkLeisure segments reveals that this segment is more likely than the others to be visiting friends or family, or staying in self catering accommodation. This meets their needs of finding accommodation that suits their needs without costing them too much money.

When looking at what is important when it comes to the choice of carrier, price is more important for this segment compared to the others.

They are also heavy internet users and so will search for the cheapest fares possible regardless of which carrier it is with.

Full tables of all the ArkLeisure segments can be found in Appendix 8.

#### 4.3.2 Cosmopolitans

##### **Outlook:**

- Strong, active and confident.
- Do what they want rather than follow any particular fashion.
- Stylish people but it is individuality rather than fashion that is important to them.
- Comfortable trying new things that are out of the ordinary.
- Happy to hold traditional values when appropriate.
- Early adopters but this is generally based on their personal interest in new products and opportunities rather than on fashion trends. A result of this is that they are early to try out new products, especially in the field of new technology.
- High-spending market and find it easy to justify buying expensive alternatives.
- To be given individual attention is very important for Cosmopolitans and they are willing to pay for it. This is service delivered to enable them to do what they want to do; "service that enables".
- Are risk takers and this is reflected in their purchases and their desire for things that are new and different. They like new challenges, both physical and intellectual.
- Have an appreciation of art and culture.
- Life for this group is full and active, yet peace and relaxation is still valued in the right circumstances.

This segment accounts for 19% of the UK population and has an even spread across the ages. They have a higher income than many of the other segments with the majority being in the ABC1 socio economic group.

##### **Interests & Activities:**

- **Personal interests** - Cosmopolitans like shopping, cooking and arts and culture.
- **Days out and attractions** - Cosmopolitans have a slight bias towards heritage and arts or cultural attractions. Their active nature is also reflected in the fact that they have a strong appeal towards days out in the 'great outdoors' – this could be visits to a National Park, a walk in the country side or a day at the beach. The atmosphere that

drives their choice of a day out is something that is educational and something that is mentally challenging.

- **Shopping** - Cosmopolitans spend a lot of money on clothes and up market fashion chains (e.g. GAP) are where they are likely to be found. They also like places to shop that have a strong independent sector (e.g. antique shops or specialist shops).
- **Eating & drinking** - Cosmopolitans are the segment to eat out most often and are drawn to new, self found, or non-chain restaurants. Wine bars are popular for drinking.
- **Nights out** - Cosmopolitans have a range of nights out that appeal and these include comedy, cabaret, theatre and ballet.
- **Media** – Into films news and comedy. Less time spent viewing TV than the majority of other segments.
- **Holidays** – Most likely segment to use the long haul and more independent operators (e.g. Kuoni, Expedia, Trailfinders or cruise operators).
- A good short break for a Cosmopolitan allows them to escape, do their own thing and expand their knowledge or experience.

Cosmopolitans being active are a significant group in many tourism segmentations. This group is also quite a high spending group so are popular to target. They like to try out new things and are early adopters so if there is an up and coming destination to travel to then this segment is more than likely to be one of the first to go. Being that they travel frequently, they are knowledgeable about destinations and how to get there. Competition amongst destinations will be greatest among this group, as everyone wants to attract the high spending frequent traveller.

These people want to be away from the mass-market element of travel. They will still go on packages but with the more upmarket or independent operators. They are more likely to want to experience the 'real' destination, so in Nord-Pas de Calais areas that are geared towards British tourists are not likely to appeal to this segment.

They look for something new and different so highlighting the features that are unique to the region or experiences they are unlikely to find elsewhere will go some way to attracting this group.

This segment is more likely to be travelling for leisure reasons and will choose hotels over other types of accommodation. Price is important for this segment but other factors also play an important role. The speed of the crossing and comfort are both important factors. Cosmopolitans will pay for service and it is efficiency that is important to them; they want things to work for them, so while on a short break they do not waste too much time doing mundane things so they can make the most of their break.

In the focus group discussions people mentioned the appeal of the restaurants in Nord-Pas de Calais. Giving Cosmopolitans information on specific restaurants that will give a traditional French experience will help raise the awareness and give them specific names to aim for in the region.

#### 4.3.3 Habituals

The final segment worth mentioning is Habituals. This group represents a higher than average proportion of the Cross Channel market compared to the national picture.

#### **Outlook:**

- Value a more relaxed pace of life.

- They are strongly traditional.
- Very resistant to any expenditure. Though this is possibly a reflection of their poor means.
- Strongly resistant to change.
- They will make purchase decisions on function rather than style. Fashion has little value to this group.
- They are also very risk averse and show little interest in new options or opportunities.
- This group has and spends little money, not for brands or for service. They find it hard to justify expense of any sort.
- They have no interest in arts or culture.

This segment is one of the oldest segment groups with 57% being over 55 years of age. 81% are either retired or post family.

Habituals are generally of low interest to most tourist markets due to their low activity rates and low spend. They do what they always have done and are unlikely to be persuaded to do anything else.

This segment is the one who is most likely to be doing the day trip for shopping purposes. Their motivations and purpose do not change. Their choice of carrier is driven primarily by price but also by previous experience. This segment is also least likely to be travelling with children. These are the sort of people who, if no marketing were done, would still cross the Channel for a shopping trip because it is what they have always done.

#### 4.4 Origin & Destination

The majority of the passengers crossing the Channel originate in the UK. 80% (11.2m) of all respondents giving their origin details come from the UK. This proportion remains similar to 5 years ago, when it was 81%.

The remaining 20% (2.8m) originate primarily in France (6%/ 0.8m), Belgium (3%/ 0.4m), Germany (3%/ 0.4m) and The Netherlands (2%/ 0.2m). Again, these proportions are very similar to 5 years ago.

The proportion of UK cross channel passengers decreases slightly in the peak summer months but only by four percentage points (from 80% overall to 76% in the summer months).

Almost half of the UK respondents crossing the Channel originate in the counties close to the crossing point. The most popular originating regions for UK travellers are listed in the table below.

**Table 4.3: UK origin regions by quarter and length of trip**

	Total	Jun-Aug (Qtr 1)	Sep-Nov (Qtr 2)	Dec-Feb (Qtr 3)	Mar-May (Qtr 4)	Day trip	1-3 nights	4+ nights	Spent	Spent	Spent	Transit
									time in - Kent & NPdC	time in - Kent only	time in - NPdC only	through - Kent & NPdC
East Anglia	16%	15%	17%	16%	17%	16%	18%	12%	13%	13%	17%	17%
South East	41%	38%	43%	44%	41%	57%	40%	24%	33%	26%	50%	39%
London	9%	9%	9%	9%	9%	9%	11%	6%	8%	6%	10%	10%
South West	6%	6%	5%	5%	7%	3%	6%	27%	7%	11%	4%	6%
West Midlands	7%	7%	5%	6%	7%	4%	7%	7%	9%	10%	5%	7%
East Midlands	7%	8%	8%	6%	7%	5%	7%	7%	9%	8%	6%	8%
North West	4%	5%	3%	4%	4%	1%	3%	6%	5%	9%	2%	4%
North East	1%	2%	1%	1%	1%	0%	1%	2%	2%	3%	1%	1%
Yorkshire	5%	6%	4%	5%	4%	2%	3%	6%	6%	7%	3%	5%
Scotland	1%	2%	1%	0%	1%	0%	1%	2%	2%	3%	1%	1%
Wales	2%	2%	3%	2%	3%	2%	2%	2%	4%	5%	2%	2%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

**Base: All UK Respondents – Stage 1 (9,551)**

Within the South East, Kent alone accounts for 17% of the overall UK total.

**Table 4.4: South East breakdown of Cross Channel trips**

	Total	Jun-Aug (Qtr 1)	Sep-Nov (Qtr 2)	Dec-Feb (Qtr 3)	Mar-May (Qtr 4)	Day trip	1-3 nights	4+ nights
Buckinghamshire	2%	2%	2%	2%	2%	2%	2%	2%
Hampshire	4%	4%	3%	4%	4%	3%	5%	3%
Isle of Wight	0%	0%	0%	1%	0%	0%	0%	0%
Kent	17%	15%	18%	20%	18%	31%	13%	8%
Oxfordshire	2%	2%	1%	1%	2%	1%	1%	1%
Surrey	7%	6%	9%	5%	7%	9%	7%	4%
East Sussex	4%	4%	4%	3%	4%	5%	3%	3%
West Sussex	2%	2%	3%	3%	2%	3%	3%	1%
Middlesex	2%	2%	2%	2%	2%	2%	2%	1%
South East Total	41%	38%	43%	44%	41%	57%	40%	24%

**Base: All South East respondents – Stage 1 (3,931)**

Using the postcodes of the respondents the home locations of the UK Cross Channel market can be plotted on a map. The following diagram highlights the importance of the local market to the Cross Channel region.

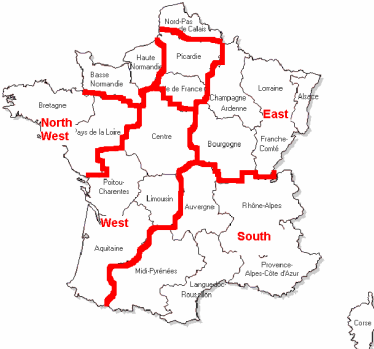
**Figure 4.6: Origin of UK Cross Channel Market**

The local market becomes more important in the quieter winter months, which is when the proportion of shopping trips and day trips increases.

For the 6% (0.8m) of the cross Channel market originating in France the most popular origin regions are the ones with the most convenient access to the crossing. Ile de France (28%/ 0.2m) and Nord-Pas de Calais (27%/ 0.2m) are the two most common origin regions, the rest are minor in comparison; 4% (0.03m) for Picardie, Haute Normandy, Poitou Charentes and Rhone Alpes.

**Table 4.5: France origin regions by quarter and length of trip**

France Origin Regions		Jun-Aug (Qtr 1)	Sep-Nov (Qtr 2)	Dec-Feb (Qtr 3)	Mar-May (Qtr 4)	Day trip	1-3 nights	4+ nights
Île de France	28%	32%	22%	25%	32%	18%	25%	36%
Picardie	4%	4%	6%	4%	3%	5%	6%	3%
Nord Pas de Calais	27%	26%	25%	37%	24%	45%	35%	15%
Normandy	5%	4%	5%	7%	5%	4%	7%	4%
North West	5%	6%	5%	3%	5%	5%	4%	5%
West	10%	9%	15%	10%	5%	12%	4%	13%
South	11%	9%	12%	9%	16%	8%	6%	15%
East	9%	10%	9%	3%	10%	3%	12%	10%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%



**Base: All French respondents – Stage 1 (803)**

With the majority of the cross Channel passenger flow being outbound from the UK it comes as no surprise that the main destination countries are in Northern Europe and as the Channel borders England and France, these are the 2 most popular destination countries.

Of all the valid responses for destination country, France is the most popular (57%/ 8m), then England (15%/ 2.1m), followed by Belgium (10%/ 1.4m), Germany (4%/ 0.5m), The Netherlands (3%/ 0.4m) and Spain (3%/ 0.4m). Compared to the results from the last survey the proportions remain very similar for these destination countries, with a one percentage point increase or decrease across all these countries.

**Table 4.6: Destination county comparison**

Dest. Country	Total		
	2006	2000	Var
UK	16%	16%	-4%
France	58%	59%	-1%
Germany	4%	5%	-16%
Belgium	10%	8%	15%
Spain	3%	1%	47%
Italy	2%	1%	31%
Netherlands	3%	4%	-18%
Switzerland	1%	1%	21%
Other countries	4%	5%	-27%
Total	100%	100%	

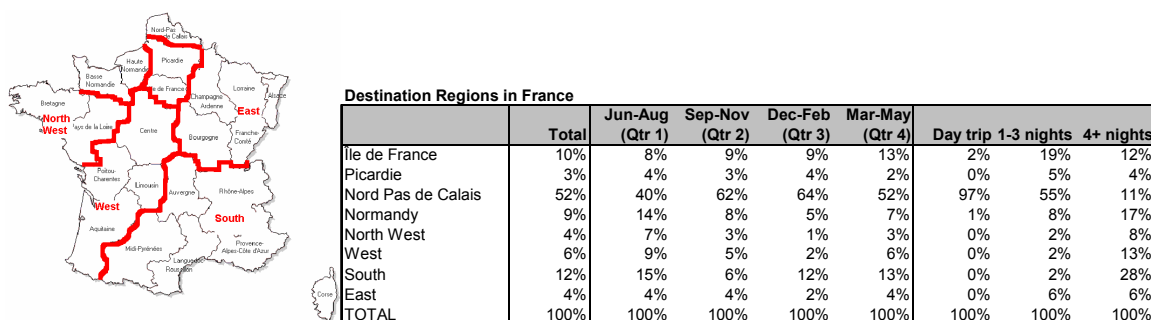
**Base: All respondents – Stage 1 (11,502 in 2006 & 15,500 in 2000)**

For day trips and short breaks the destination is most likely to be the end point of the train or ferry route (France, England or Belgium) whereas for longer trips other countries in Northern Europe become more popular. This is because people do not want to waste too much time

travelling when they are on a short break or day trip; they want to spend the maximum available time in their destination.

The final destination region for trips to France is most likely Nord-Pas de Calais or Ile de France. Paris is one of the most popular city break destinations in Europe for UK residents and as can be seen from the following table most people heading to Ile de France are likely to be going for a short break or longer trip. In the winter season the Alps become popular for winter sports holidays.

**Table 4.7: France destination regions by quarter and length of trip**



**Base: All respondents with final destination in France – Stage 1 (5,692)**

A clear picture emerges as to the popularity of destinations when looking at the duration of trips. Nord-Pas de Calais is by far the most popular destination for day visitors but the popularity of other regions in France increases for longer duration trips.

Kent and London are the most popular destination regions for inbound traffic to the UK. Again, the counties closest to the Channel crossing are more popular for a day visit but the rest of the UK opens up for longer duration trips.

Again this is due to the proximity issue and the amount of time people have to spend travelling on day trip. They want to get to their destination quickly and with minimum effort.

**Table 4.8: UK destination regions by duration of trip**

**UK destination region by duration of trip**

	Day	1-3 nights	4+ nights
Berkshire	0%	3%	1%
Cambridgeshire	1%	2%	2%
Cornwall	2%	0%	10%
Devon	0%	1%	4%
Dorset	0%	2%	3%
Essex	4%	4%	1%
Gloucestershire	3%	1%	1%
Hampshire	3%	4%	4%
Kent	57%	17%	10%
London	10%	30%	18%
Oxfordshire	0%	3%	2%
Surrey	3%	3%	3%
East Sussex	3%	5%	3%
West Sussex	1%	2%	2%
Warwickshire	0%	2%	2%
West Yorkshire	1%	0%	4%

**Base: All with final destination in the UK – Stage 1 (1,745)**

### 4.5 Duration

Duration of trips is where the most noticeable change has occurred over the past five years. There appears to be a trend of crossing the channel for longer duration trips at the expense of day trips and short breaks. The pattern is evident across the year with 47% (6.6m) of trips overall being four nights or more in duration.

As was seen in the previous section, the longer the duration of the trip the more likely someone is to travel further from the Channel crossing. There may be a number of possible reasons for this; a desire for better weather further south on the Continent, previous experience of the north of France or the South East of England and a desire to try somewhere new, or friends or relatives living further from the Channel crossing, or less of an appeal of crossing the Channel for alcohol or tobacco shopping.

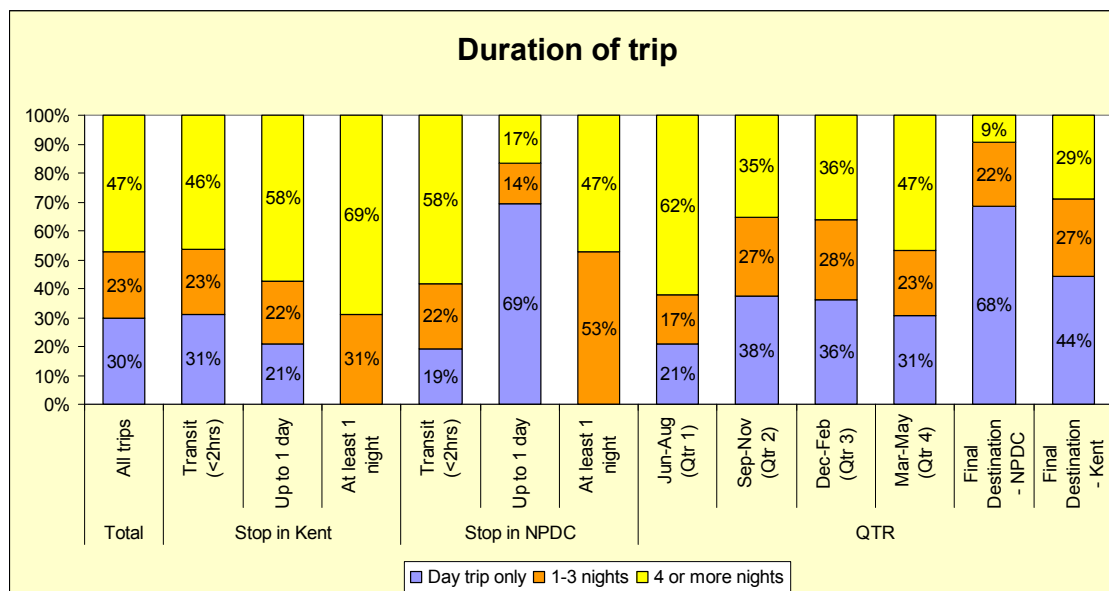
**Table 4.9: Comparison of Duration of Trip (2006 vs. 2000)**

Nights away from home	Total			Time of Year											
				Qtr 1 (Jun-Aug)			Qtr 2 (Sep-Nov)			Qtr 3 (Dec-Feb)			Qtr 4 (Mar-May)		
	2006	2000	Var	2006	2000	Var	2006	2000	Var	2006	2000	Var	2006	2000	Var
None day trip only	30%	38%	-29%	21%	27%	-33%	38%	47%	-24%	36%	46%	-27%	31%	37%	-22%
1-3 nights	23%	26%	-13%	17%	22%	-29%	27%	27%	0%	28%	28%	-2%	23%	27%	-18%
4 or more nights	47%	36%	25%	62%	50%	19%	35%	26%	26%	36%	26%	28%	47%	36%	23%
Total	100%	100%		100%	100%		100%	100%		100%	100%		100%	100%	

Base: All Respondents – Stage 1 (12,147 in 2006; 16,199 in 2000)

Overall, the majority of people crossing the Channel are going on a break of over four nights. However, this does vary depending on the time of year people are travelling and their destination. The following chart indicates some of the key differences in the duration of trips.

**Figure 4.7: Duration of trip**



Base: All respondents – Stage 1 (12,147)

It can be seen from the chart that the majority of people who stop in Kent for up to one day are actually on a short break or, more likely, a longer holiday. The vast majority of these (71%) reside in the UK. Given that the majority of UK travellers on a longer duration trip are not originating in Kent or Essex they are likely to have a lengthy drive to get to the Channel ports. With the uncertainty of traffic on the main roads and motorways in the South East it is

likely that people driving to the ports will build in some contingency time into their journey or drive down to Kent, stay the night and be ready to spend the next day driving once they hit the Continent after their crossing.

As expected, there are a higher proportion of longer duration trips in the summer months, given the better weather and the schools on holiday.

Most of the people who stop in Nord-Pas de Calais for up to one day are on a day trip and similarly the majority of people who have their final destination as Nord-Pas de Calais are staying for one day. This shows that they are not stopping in Nord-Pas de Calais en route to somewhere else, or if their final destination is Nord-Pas de Calais they are not using it as a short break destination.

Compared to the last survey, fewer travellers are stopping in both Kent and Nord-Pas de Calais however the decline is most noticeable in Nord-Pas de Calais because the vast majority of cross Channel traffic originates in the UK.

**Table 4.10: Comparison of proportion of travellers stopping in Kent & Nord-Pas de Calais**

	Total			Time of Year											
				Qtr 1 (Jun-Aug)			Qtr 2 (Sep-Nov)			Qtr 3 (Dec-Feb)			Qtr 4 (Mar-May)		
	2006	2000	Var	2006	2000	Var	2006	2000	Var	2006	2000	Var	2006	2000	Var
Any time spent in Kent															
Yes	21%	27%	-28%	25%	33%	-31%	19%	25%	-28%	18%	24%	-34%	19%	25%	-27%
No, just travelling through	79%	73%	7%	75%	67%	10%	81%	75%	7%	82%	76%	7%	81%	75%	7%
Total	100%	100%		100%	100%		100%	100%		100%	100%		100%	100%	
Any time spent in NPDC															
Yes	36%	48%	-32%	30%	39%	-30%	43%	57%	-31%	40%	56%	-39%	36%	44%	-23%
No, just travelling through	64%	52%	19%	70%	61%	13%	57%	43%	24%	60%	44%	26%	64%	56%	13%
Total	100%	100%		100%	100%		100%	100%		100%	100%		100%	100%	

**Base: All Respondents – Stage 1 (12,147 in 2006; 16,199 in 2000)**

The decline seems to be in the day trip market, which has dropped by nine percentage points, in terms of the share of visits to the region, since 2000. The short trip market has also declined and the longer trip market (4+ nights) has increased and now accounts for 47% of the cross Channel trips (up 12 points since 2000).

**Table 4.11: Comparison of trip duration**

Nights away from home	Total		
	2006	2000	Var
None day trip only	30%	38%	-29%
1-3 nights	23%	26%	-13%
4 or more nights	47%	36%	25%
Total	100%	100%	

**Base: All Respondents – Stage 1 (12,147 in 2006; 16,199 in 2000)**

Given the increase in the proportion of trips of over 4 nights and that destinations for trips of this duration are more likely to be further away it is less likely that those travellers will stop so close to the Channel crossing.

The summer months show the greatest decline in people spending any time in Nord-Pas de Calais. With the higher proportion of family trips and trips to destinations further from the crossing it is not surprising to see people forgoing a stop in order to get to their destination, especially if they have just had a break from driving with a ferry or train journey. The most common reason for not stopping in either of the regions was because people just wanted to get to their final destination.

The good news is that those who do stop in the two regions are stopping for longer than they used to. The proportion of visitors staying in the region for two nights or less has decreased by 10 percentage points over the past five years and the proportion staying between four and seven nights has increased by 12 percentage points. This is particularly noticeable in the spring and summer months.

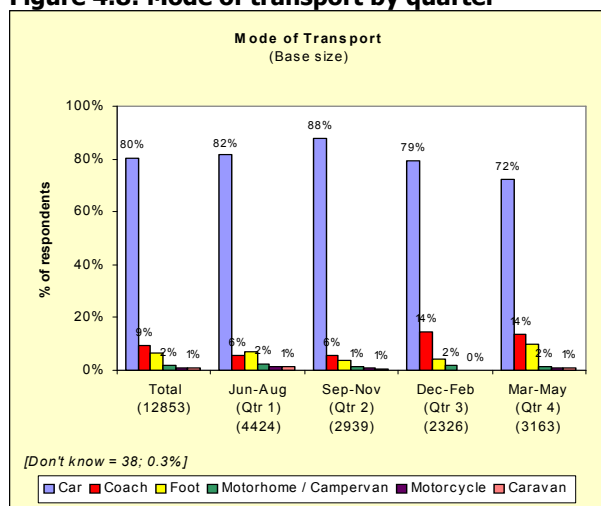
## 4.6 Mode of Travel

Car travel is the dominant transport mode for travellers crossing the Channel, accounting for 80% of respondents.

Coach travel is higher in the winter and spring months, which could be the result of visitors to Christmas markets or the ski market using coach operators to get from the UK to the Alps.

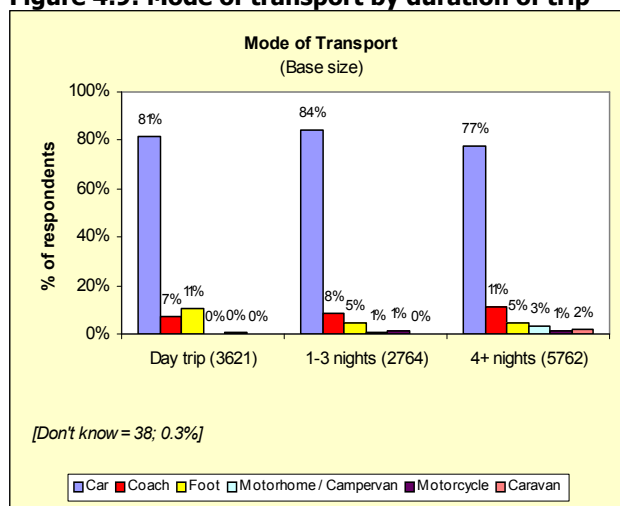
Coaches, campervans and caravans are more likely to be used for longer duration trips than other modes of transport.

**Figure 4.8: Mode of transport by quarter**



Base: All respondents – Stage 1

**Figure 4.9: Mode of transport by duration of trip**



### 4.6.1 Coach Operators

Interviews were carried out with five coach operators to provide some additional insight into this specific section of the market.

These coach operators interviewed were:

- Independent Coach Travel
- Buzzlines Travel
- Select Travel Service
- Key Stage Travel
- Eagle Coaches of Bristol

From the discussions, coach operators hold a lot of knowledge about the areas that they go to in terms of suitable accommodation, places to go, attractions and places to eat. When a tour organiser contacts a coach operator they will offer advice and recommendations based on their clients' requirements. Organised groups tend to be based around a specific purpose. For

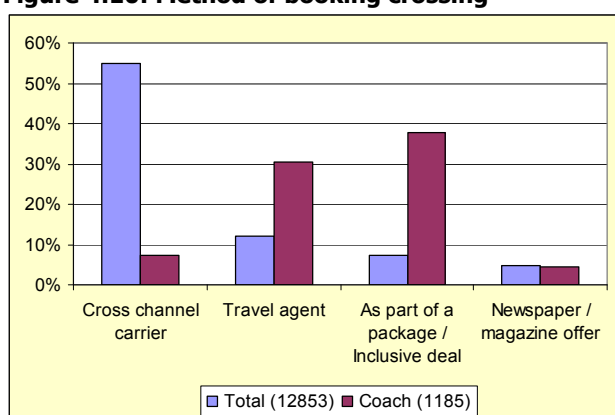
example, school groups travel to learn about the history of WWI, social clubs go for days out, youths and families go to amusement parks and groups go for shopping. Coach operators look for suitability for coaches and a suitable fit with their groups interest when looking at potential destinations.

City breaks make up the majority of the volume for some of the carriers but they are seeing a decline in these volumes. It could be that people are becoming more confident to arrange their own travel or that there are other modes of transport available that will take them to their destination quicker than a coach will.

The one thing that seems to link trips by coach is that it revolves around a theme, which could be shopping, Christmas markets, or skiing to name but three.

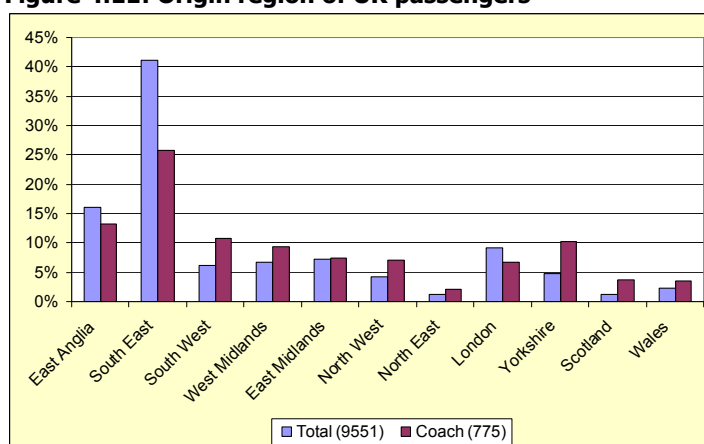
The results from the quantitative stage reveals that coach travellers from the UK are more likely to come from the northern counties of England (Yorkshire, Warwickshire & Lancashire) compared to those using other modes of transport. They seem less adventurous in their holiday planning as they are more likely to book via a travel agent and therefore rely on the personal interaction compared to others who tend to organise the elements themselves via the internet. They are also more likely to be travelling further from the Channel than those using other modes with Belgium, Spain, Austria and Germany being popular destinations as well as France.

**Figure 4.10: Method of booking crossing**



**Base: All Respondents – Stage 1**

**Figure 4.11: Origin region of UK passengers**



The key point from the discussions with the coach operators is to ascertain what type of company they are. Some operate tours themselves, some operate tours on behalf of clients and some are purely charter operators.

It is obviously the tour operators where the greatest potential lies for marketing. Given that some operate direct to the consumer and some operate for specific sections of the market (e.g. schools) then it would be beneficial to develop personal relationships in order to develop the potential.

Distance is not a key issue for coach operators as many of them drive significant distances in Britain and the continent to get to their destination, so the destination itself will be a key draw. Given that the operators mentioned themes, linking a destination and a theme will be more attractive to this section of the market. As mentioned earlier a tour focusing on war history could generate a specific group’s interest in the area, or a trip purely for shopping is another potential theme. There will need to be enough of a draw to the area when compared to some

of the other destinations that coach tours frequent (e.g. Paris, Christmas markets in European cities, etc.), so unique selling points about the region will need to be highlighted.

#### **4.6.2 Campervans**

A focus group was held with campervan users in the UK. Many people with campervans are using them for their hobbies or interests. Carp fishing is popular in France and some of the campervan users that were involved in the discussions use their campervans regularly for these trips. It is mainly groups of men involved in this pastime and they tend to stop in Calais to buy their alcohol for the evenings while on this trip.

One thing that stands out for this group is their independence. The campervan allows them the freedom to go where they want, when they want. There are differences in the types of people; some are planners and know where they are going to be every day and night and others are spontaneous in their choice of destination and length of stay.

There are two dominant concerns that campervan owners have and these revolve around parking and security.

Destinations and attractions can make life easier for campervans by having suitable parking spaces or areas for them. Specific areas raised by the group were mainly at supermarkets and shopping areas where there were height restrictions or standard car spaces that are too small for their vans.

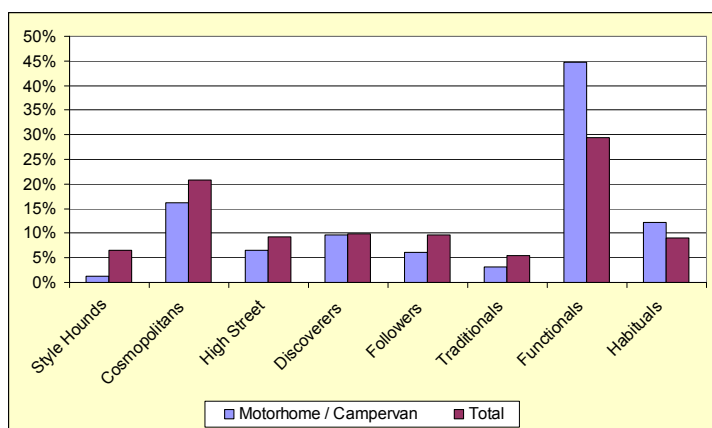
Security is mainly an issue when it comes to where to stop overnight. Most will use dedicated sites as they feel this offers the best security.

Looking at the ArkLeisure segments and campervan owners, it is clear that they are most likely to fall into the Functional category. This fits with their need to have basic cheap accommodation that will not cost a lot of money (after the initial outlay). It also allows them to see many places and have many breaks without the need to spend lots of money.

There are also a higher proportion of campervan users in the Habitual segment, who by nature are doing the same breaks they would have done previously and using a campervan allows them to holiday without changing their ways.

As these two segments are positioned at the lower end of the ArkLeisure model, they are the least likely of all the segments to embrace new ideas, so any new product or service offering would have to be positioned in a way that was not seen to be radically different from what is available now.

**Figure 4.12: ArkLeisure segment of campervan users**



**Base: All respondents – Stage 1**

Campervan owners have different needs and motivations on their trip. Some of the more mature owners highlighted a desire to have adult only sites or areas as they did not want to be surrounded by children. Most wanted access to the main facilities in a destination and easy links to get there; they wanted to go out and experience the local restaurants and culture.

A concept of dedicated campervan routes was raised but it was felt that these had limited appeal. Some expressed that they might follow some of the route but it was unlikely that they would purposefully set out along the whole thing. If there are things worth seeing in an area then they will go and see them regardless.

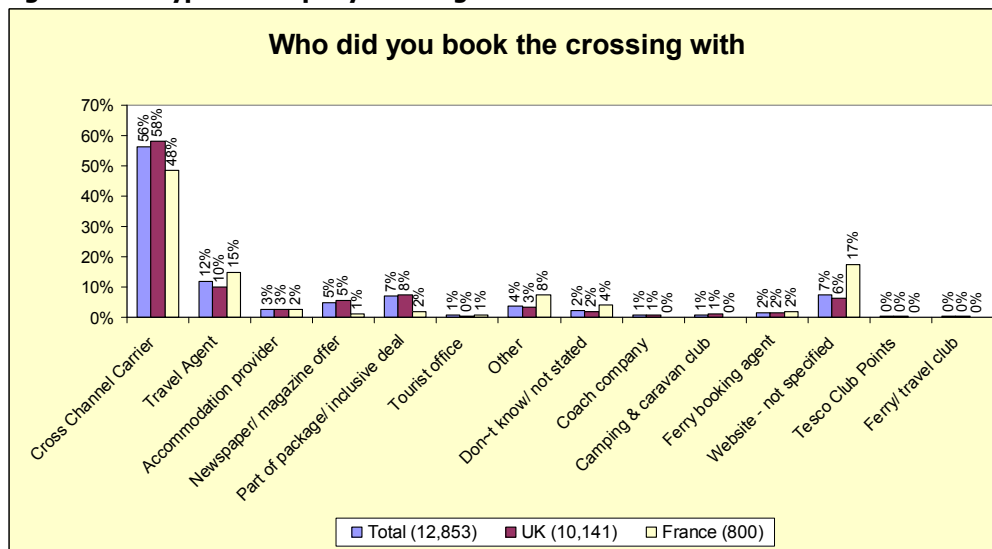
Campervan owners get a lot of information from the clubs and societies that they belong to. Providing them with practical information about easily accessible places will help encourage them to an area, as long as it is an area that they have some desire to go to in the first place.

## 4.7 Booking

The majority of cross Channel passengers are booking their crossing direct with the cross channel operators. Although the French look like they are less likely than the British to go direct to the operators (as indicated in Figure 4.13) a higher proportion indicated that they booked online but did not indicate which website they used, so there is likely to be a proportion of this group who are booking direct with the carriers.

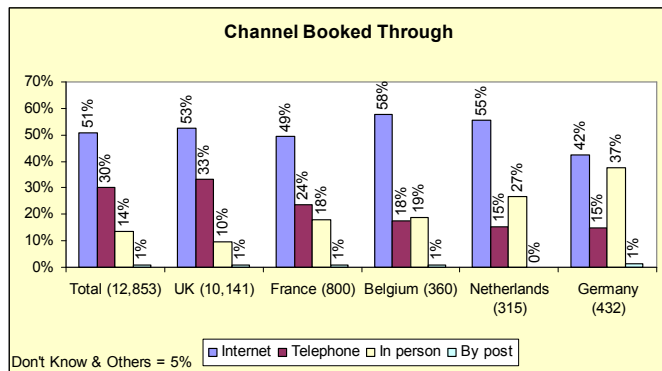
The French are marginally more likely to book their crossing through a travel agent than the British.

**Figure 4.13: Type of company crossing was booked with**



Base: All respondents – Stage 1

**Figure 4.14: Channel used to book the crossing**



The internet is the most common method to book the crossing with, accounting for just over half the respondents (51%). Residents of continental Europe are more likely to book in person than the British are, because they are more likely to book through a travel agent. Bookings made direct with the Cross Channel carriers via the internet account for just over one third of all bookings.

**Table 4.12: Type of company and channel used to book the crossing**

		How did you book this trip?					Total
		Internet	Telephone	In person	By post	Other	
Who did you book your crossing with	Cross Channel Carrier	34%	17%	6%	0%	1%	58%
	Travel Agent	3%	4%	5%	0%	0%	12%
	Accommodation provider	1%	1%	0%	0%	0%	3%
	Newspaper/ magazine offer	2%	3%	0%	0%	0%	5%
	Part of package/ inclusive deal	2%	3%	1%	0%	1%	7%
	Tourist office	0%	0%	0%	0%	0%	1%
	Other	1%	1%	1%	0%	1%	4%
	Coach company	0%	0%	0%	0%	0%	1%
	Camping & caravan club	0%	1%	0%	0%	0%	1%
	Ferry booking agent	1%	0%	0%	0%	0%	2%
	Website - not specified	8%	0%	0%	0%	0%	8%
	Tesco Club Points	0%	0%	0%	0%	0%	0%
Ferry/ travel club	0%	0%	0%	0%	0%	0%	
<b>Total</b>		<b>51%</b>	<b>31%</b>	<b>14%</b>	<b>1%</b>	<b>3%</b>	<b>100%</b>

Base: All respondents – Stage 1 (12, 853)

### 4.8 Frequency of Travel

Travel by ferry is the mode used most frequently with an average of 4.4 trips per person over the past two years. There is a slightly higher average frequency during the winter months,

which is when the highest concentration of day trips to Nord-Pas de Calais can be seen and reflects the smaller number of infrequent travellers travelling at this time.

**Table 4.13: Average number of crossings by mode over the past 2 years**

Mean no. of trips over past 2 years by mode

	Total	Quarter			
		Jun-Aug (Qtr 1)	Sep-Nov (Qtr 2)	Dec-Feb (Qtr 3)	Mar-May (Qtr 4)
Sea	4.4	3.7	4.5	5.4	4.5
Tunnel	3.9	3.4	4.3	4.6	3.5
Air	2.9	2.8	2.7	3.7	2.7

**Base: All respondents – Stage 1 (12, 853)**

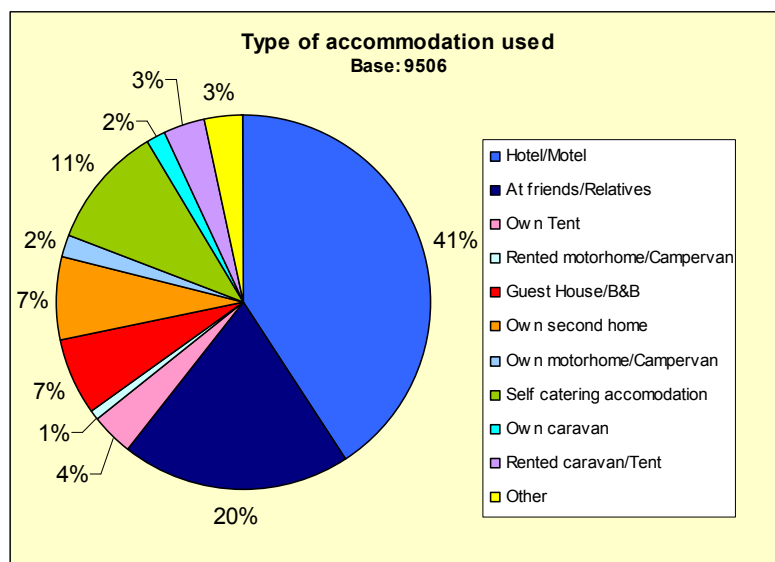
The above table looks at the results for all travellers but the residents of Kent and Nord-Pas de Calais make much more frequent use of the crossing. With the tunnel and ferry readily available on their doorstep Kent residents take 6 sea crossings over a 2 year period and/or 5 train crossings. They make fewer crossings by air because it is less convenient for them. Another reason is that the local market is enticed across the channel for the shopping and they can fill their car up if they go by train or ferry.

Nord-Pas de Calais residents take 8 seas and/or 7 train crossings over a 2 year period. Again the convenience factor comes into effect for those living close to the Channel.

### 4.9 Accommodation

Hotels & Motels are the most common type of accommodation used by people crossing the Channel.

**Figure 4.15: Type of accommodation used on trip**



**Base: All respondents staying more than 1 night – Stage 1**

Trips where the final destination is Nord-Pas de Calais tend to use hotels or motels whereas trips where the final destination is Kent tend to use friends and family’s accommodation. Visiting friends and family is a key motivation for visitors to the UK as it allows them a holiday without having to worry about the accommodation, for which the UK has a generally poor perception in terms of cost and quality.

The summer months see the largest variety of accommodation types used as more people use their tents, caravans and motor homes during the warmer summer period.

It was identified earlier that one of the main segments crossing the Channel are the Functionals, who are a very price conscious group. 50% of the Functional segment goes across the channel for more than 4 nights, which is the largest proportion of all the segments. This would go some way to explaining why hotels become less popular the longer the duration of the trip. As trips move above 4+ nights self catering accommodation becomes more popular.

## 4.10 Key Types of Traveller

There are key groups of traveller crossing the Channel between Kent and Nord-Pas de Calais.

It is a very functional market based on the mode of transport. The choice to cross by ferry or train is a functional one based on distance, type of transport, group size and, more importantly, cost. For example, if you have a campervan or a caravan then the only way to get it to the continent is to go on the ferry or the train.

The day visit market that is going for the purposes of shopping is made up mainly of Functional, Habitual and Cosmopolitan segments. This is not a typical shopper profile, a large proportion of which would be made up of High Streets and Style Hounds, who are into new trends and fashion labels. The Functional and Habitual shoppers are likely to be driven by the savings that can be made on groceries and household items. The most significant groups, in terms of volume, in this market are Functional couples, Functional groups of adults, Cosmopolitan couples and Habitual couples.

In terms of people staying in Nord-Pas de Calais, it is dominated by couples, who are almost twice as common as other group compositions. Again it is Habitual, Functional and Cosmopolitan couples that dominate. Family groups do stay, but mainly in the summer holiday period, when their volume is twice as much as at other times throughout the year and it is Functional families that are the dominant family group.

For people not stopping at all in Nord-Pas de Calais, the common dominant theme is that they are on a holiday or leisure trip. Again it is dominated by couples and families, mainly in the Functional and Cosmopolitan segment.

## 4.11 Nature of Crossing

The majority of Cross Channel travellers transit through Kent and Nord-Pas de Calais.

**Table 4.14: Nature of stop in Kent and Nord-Pas de Calais by country of origin**

		Total		Origin country				
		Volume	%	UK	France	Belgium	Netherlands	Germany
Kent	Up to 1 day	1,091,470	8%	6%	15%	19%	10%	15%
	Stay trip	934,783	7%	4%	17%	13%	26%	18%
	Transit	12,051,127	86%	89%	68%	67%	64%	67%
	Total	14,077,381	100%	100%	100%	100%	100%	100%
NPDC	Up to 1 day	3,100,008	22%	26%	7%	1%	2%	7%
	Stay trip	1,191,653	8%	10%	10%	1%	0%	3%
	Transit	9,785,720	70%	64%	83%	98%	98%	90%
	Total	14,077,381	100%	100%	100%	100%	100%	100%

(Those stopping for less than 2 hours in the regions have been classified as transit passengers).

**Base: All respondents – Stage 1 (12,853)**

With the geographical location of the regions it is not surprising to see that continental Europeans are more likely to stop in Kent than the British and the British are more likely to stop in Nord-Pas de Calais than the French and other northern Europeans.

In terms of the important markets for Kent the French and Germans make up the largest volume of staying visitors. Although 26% of the Dutch cross Channel passengers are staying in Kent there are less of them crossing compared to the French and Germans.

Just over a quarter of the passengers who live in the UK are stopping in Nord-Pas de Calais for up to a day. This does not necessarily mean that they have Nord-Pas de Calais as their final destination, as the following table demonstrates. 43% of people who stopped in Nord-Pas de Calais for up to one day were travelling onwards to another destination.

**Table 4.15: Proportion of stops in Nord-Pas de Calais with their final destination in the region**

	Final Dest - Elsewhere	Final Dest - NPDC
Stop in NPDC Day trip	43%	57%
Stay trip	46%	54%

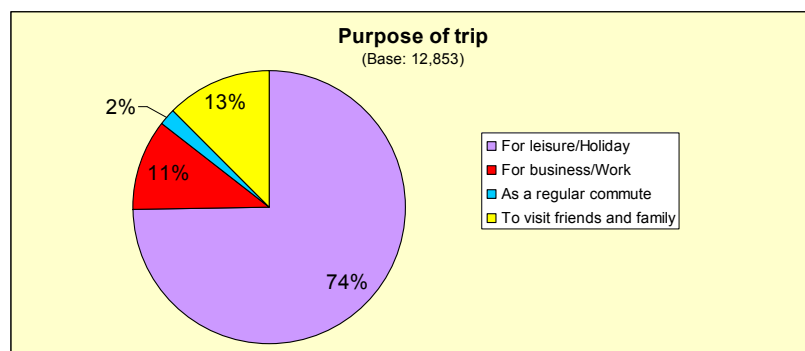
**Base: All respondents – Stage 1**

As was noted earlier in the report, the proportion of people stopping in Kent and Nord-Pas de Calais has declined. This is likely to be influenced by the increase in longer duration trips, which have a tendency to avoid stopping in the regions on either side of the Channel because travellers have had a break from driving with the crossing and they just want to get to their final destination.

## 5. Purpose and Motivations

### 4.12 Purpose of Trip

In terms of volume, the majority of trips across the Channel are for leisure or holiday purposes.

**Figure 0.1: Purpose of trip**

**Base: All Respondents – Stage 1**

Comparing the results of the last survey, the proportion of business trips has declined, but this is most likely due to the fact that Eurostar was not included in the research. Business trips do not include students travelling for study purposes.

Visiting friends and family has increased in popularity but more so for people coming to the UK. Where the final destination is Kent visiting friends and family is the second most popular reason for visiting behind general relaxation.

Shopping and relaxation are still the most popular reasons for visiting Nord-Pas de Calais but shopping for alcohol and tobacco has declined and other shopping has increased in popularity.

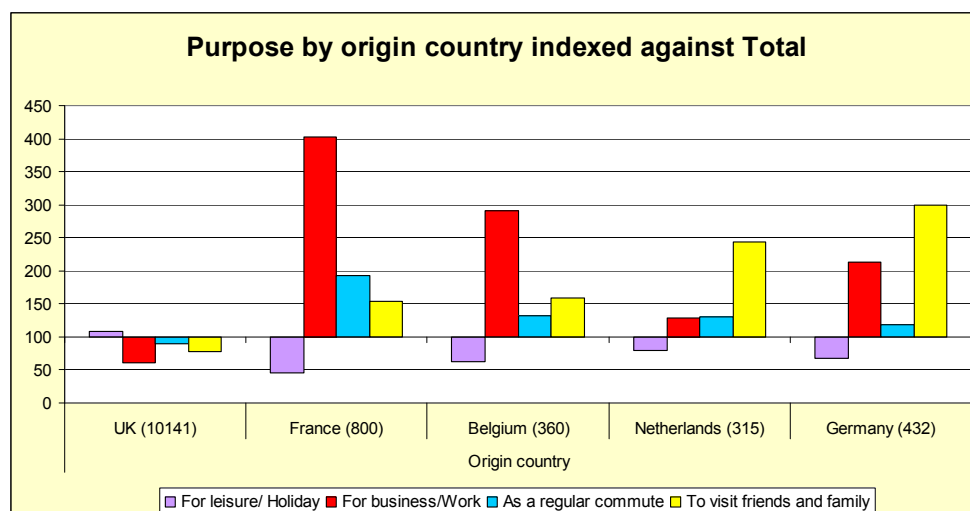
**Table 0.1: Comparison of purpose of trip (2006 vs. 2000)**

Purpose of trip	Total			Final Destination - Kent			Final Destination - NPdC		
	2006	2000	Var	2006	2000	Var	2006	2000	Var
	Non Leisure/ Business	10%	15%	-46%	17%	20%	-20%	5%	5%
Relaxation / general interest / sightseeing	46%	49%	-6%	39%	35%	11%	34%	44%	-27%
Visit friends / family	12%	9%	28%	21%	18%	14%	3%	2%	29%
Visit second home / property	4%	2%	48%	1%	1%	-67%	2%	1%	64%
Study / language school	1%	2%	-244%	2%	7%	-328%	0%	0%	
Attend an event	5%	3%	46%	7%	4%	49%	2%	1%	33%
Shopping on board / at terminal	2%	2%	-7%	3%	3%	-17%	4%	4%	-10%
Shopping on land for alcohol/tobacco	12%	13%	-10%	1%	3%	-368%	30%	32%	-6%
Other shopping on land	4%	3%	25%	8%	4%	48%	12%	7%	37%
A meal	1%	1%	6%	0%	2%	-368%	4%	2%	49%
Other	3%	2%	39%	2%	3%	-60%	3%	0%	84%
Total	100%	100%		100%	100%		100%	100%	

**Base: All respondents – Stage 1 (15,849 in 2000 & 11,728 in 2006)**

When the purpose of trip is broken down by country of origin and indexed against the total for all countries of origin some key differences appear. (Indexing compares the proportion from each category, in this case country of origin, against the proportions of all individuals in the survey)

**Figure 0.2: Purpose of trip by country indexed against the total**



**Base: All respondents – Stage 1**

The respondents from France are four times more likely to be on business compared to everyone who was sampled. Respondents from the UK are more likely to be crossing the Channel for leisure purposes and the respondents from the Northern European countries have a higher propensity for being on business or visiting friends and family. Although propensities compared to other countries may be higher for some purposes, leisure travel still makes up the majority of trips for most countries as the following table demonstrates.

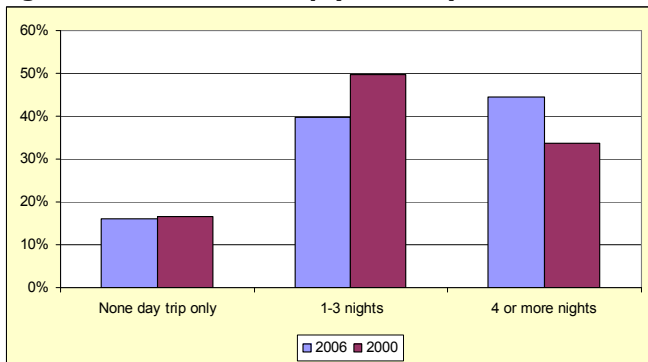
**Table 0.2: Purpose of trip by country of origin**

	For leisure/ Holiday	For business/ Work	As a regular commute	To visit friends and family	Total
UK	85%	7%	2%	10%	100%
France	36%	46%	4%	20%	100%
Belgium	49%	33%	3%	21%	100%
Netherlands	63%	15%	3%	32%	100%
Germany	53%	24%	2%	40%	100%

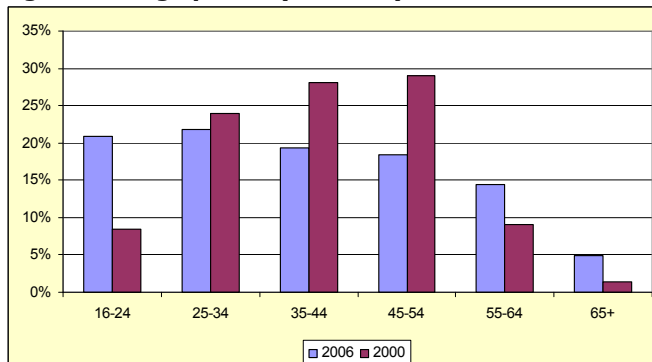
**Base: All respondents – Stage 1**

The business market was compared to the results of the previous survey (excluding Eurostar results) and the main difference between the two time periods is that the recent results are showing that business travellers crossing the Channel are spending longer away from home than they did five years ago. The age profile of the adults has also changed. Five years ago it was concentrated between the 25 and 55 years olds but has now widened to include those under 25 years old and up to 65 years old.

**Figure 0.3: Duration of trip (Business)**



**Figure 0.4: Age profile (Business)**

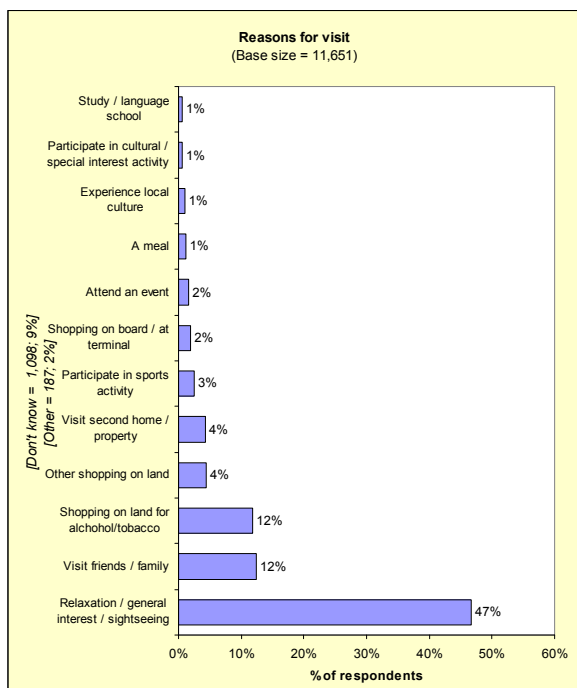


**Base: All Business passengers – Stage 1 (1,384 in 2006; 2,314 in 2000)**

There is nothing in the results to suggest why this is. The secondary reasons for the trip were analysed and a lesser proportion were combining the trip with visiting friends or relatives and the same proportion were combining it with a short break. Without knowing the nature of the business it is difficult to conclude how this market has changed.

### 4.13 Reason for Trip

**Figure 0.5: Main reason for the trip**



As the majority of trips across the Channel are for leisure purposes it comes as no surprise to see the main reason for the trip as relaxation, general interest or sightseeing. The next two most common reasons were to visit friends and relatives or to go shopping for alcohol and tobacco.

When the results for various cross breaks are indexed against the answers for everyone some key indicators emerge.

**Table 0.3: Reason for trip indexed against the total**

Index of reason for visit		Relaxation / general interest / sightseeing	Visit friends / family	Visit second home / property	Study / language school	Attend an event	Participate in sports activity	Participate in cultural / special interest activity	Shopping on board / at terminal	Shopping on land for alcohol/ tobacco	Other shopping on land	A meal	Experience local culture
Total	Total	100	100	100	100	100	100	100	100	100	100	100	100
Stop in Kent	Day trip	128	88	44	155	83	68	102	95	62	95	53	140
	Stay trip	105	159	54	43	87	110	48	80	81	69	74	190
	Transit	97	96	109	99	103	102	104	102	105	103	106	90
Stop in NPDC	Day trip	75	37	43	36	36	30	36	121	239	268	269	110
	Stay trip	129	72	174	41	50	171	115	11	46	52	95	138
	Transit	106	126	113	132	131	117	123	94	57	47	37	92
Origin country	UK	101	74	114	45	85	111	93	118	122	115	119	90
	France	68	311	26	501	193	37	71	0	0	27	30	143
	Belgium	90	153	42	833	228	13	24	0	0	121	0	81
	Netherlands	101	229	22	122	233	192	237	0	0	6	0	142
	Germany	100	246	72	246	151	0	361	0	0	26	0	46
Why trip taken	For leisure/Holiday	113	47	110	76	97	114	106	115	114	114	114	112
	For business/Work	35	303	135	740	152	51	81	0	1	14	31	41
	As a regular commute	20	219	584	0	0	0	0	0	16	144	0	0
	To visit friends and family	31	455	56	84	120	11	69	0	4	7	5	17
Quarter	Jun-Aug (Qtr 1)	125	90	94	169	119	61	86	52	54	66	63	96
	Sep-Nov (Qtr 2)	84	106	107	119	124	77	94	120	133	129	111	142
	Dec-Feb (Qtr 3)	78	94	109	13	67	162	53	148	140	143	147	86
	Mar-May (Qtr 4)	94	113	95	45	73	134	158	117	108	92	110	76

Base: All respondents – Stage 1

The total represents the value that subsequent variables are compared against, so the total will always have a value of 100. A value above 100 means that this group is more likely to fall into this section compared to everyone in the survey and a value below 100 means they are less likely to fall into this section compared to the total. It does not take into account the volume of each group, just the relative propensity.

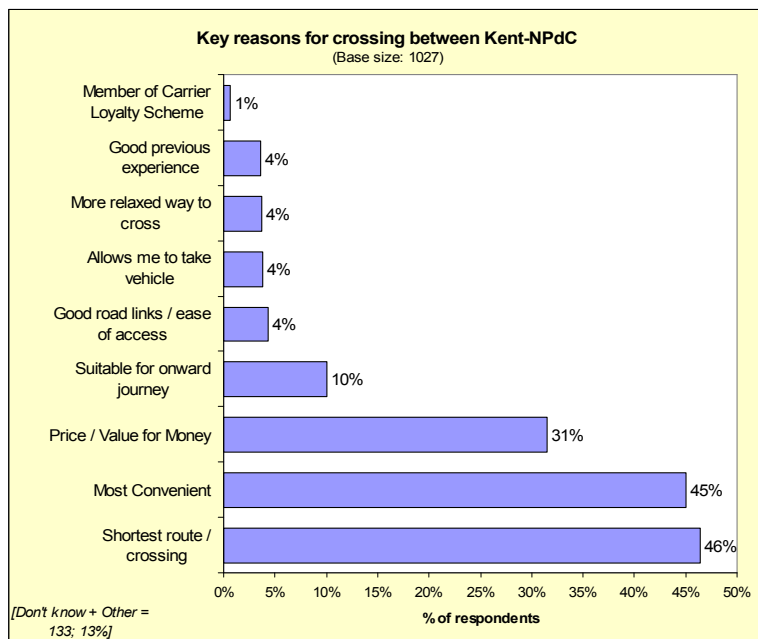
From the highlighted sections above it can be clearly seen that people stopping in Nord-Pas de Calais for up to one day are more than twice as likely to be shopping and having a meal compared to everyone interviewed. It also highlights that people in the autumn and winter months are more likely to be crossing for the purposes of shopping. This is because there is more holiday traffic crossing the Channel in the summer months who are heading further afield and when this tails off in the autumn and winter the shopping becomes relatively more important.

Residents of the northern European countries are much more likely to be crossing for the purpose of visiting friends and family, studying or attending an event than those coming from elsewhere. The focus group research highlighted the perception that people in the Euro zone find the UK an expensive place to holiday, so they are seeking other motivations to come to the UK. As most of the traffic from the UK to the continent is for leisure purposes and they make up the majority of the total volume, relatively speaking those inbound to the UK will be less likely to be travelling for leisure purposes.

#### 4.14 Motivations for choosing Kent-Nord-Pas de Calais Routes

The main reason given for why people choose to cross between Kent and Nord-Pas de Calais is because it offers the shortest crossing or it is the most convenient route. As identified in the focus groups, people going on a short break don't want to spend a long time travelling to their destination so a route that offers a short journey will appeal over other routes. There is also a large proportion of the cross Channel market living close to the Channel and a key factor, also highlighted in the group discussions, was the desire to be able to travel from a local departure point.

**Figure 0.6: Main reasons for crossing the Channel between Kent & Nord-Pas de Calais**



**Base: All respondents – Stage 2 (Telephone interviews)**

Price is also a factor, but comes more into play when the choice of carrier is being made.

Other reasons for choosing Kent to Nord-Pas de Calais routes are outlined in the chart.

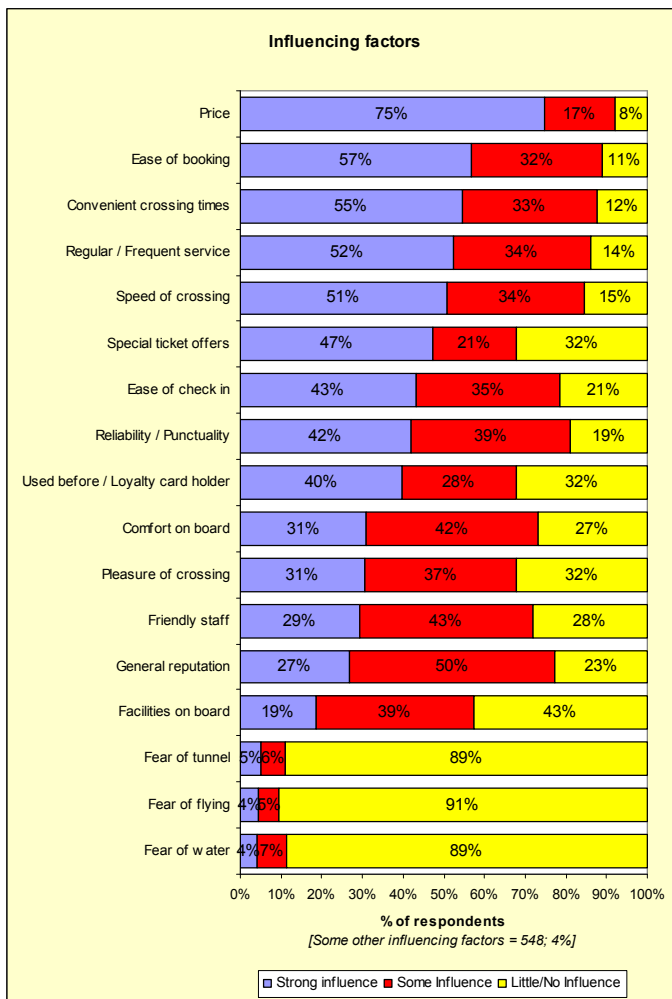
### 4.15 Carrier Choice

The most important factor when it comes to choosing which carrier to travel with is the price. This is the same in most travel sectors; once someone has decided on the route they are going to take there is a general tendency to search for the cheapest carrier to get them there.

Following price the important considerations for the choice of carrier revolve around how easy it is to book with them and how frequent or convenient the crossing times are.

Speed is somewhat of a consideration. From some discussions with coach operators the tunnel is chosen over the ferry if the amount of time in the destination is important. If coach travel starts or ends far away from the Channel crossing then they prefer to go with the ferry as it gives drivers and passengers a break and a chance to stretch their legs. Coach operators will also choose the ferry if their clients want to start the day with a leisurely breakfast.

**Figure 0.7: Influencing factors for the choice of carrier**



**Base: All respondents – Stage 1 (12,853)**

Fear of various factors affects approx. 10% of respondents, but is relatively insignificant as a driver of choice.

## 5 Staying in the Transmanche Region

### 5.1 The Short Break Market

### 5.2 Motivations for a short break

As the focus groups were developed after much of the quantitative research had been conducted short breaks were concentrated on in the discussions because both Kent and Nord-Pas de Calais were seen as short break destinations in the quantitative stages. Stopping in these regions as part of a longer duration trip was also covered but the main focus was on short breaks.

Motivations for a short break can be broken down into functional reasons and emotional reasons. The primary reason to go on a short break is an emotional one and that is to escape from everyday life.

Other reasons why people take a short break are listed below.

Emotional Reasons	Functional Reasons
<ul style="list-style-type: none"> <li>• Escape from everyday life</li> <li>• Relaxation / recharging the batteries</li> <li>• Having fun</li> <li>• Seeking new experiences</li> <li>• Discovery of a new area</li> <li>• Spend time with the family</li> </ul>	<ul style="list-style-type: none"> <li>• Celebrate a special occasion (anniversary, birthday, etc.)</li> <li>• Visit an event (music/ arts festival, sporting event)</li> <li>• Time available (long weekend/ bank holiday)</li> <li>• An offer/ promotion</li> <li>• Good weather (particularly the British)</li> </ul>

A short break is not defined by one of these reasons but a combination of many.

The British were asked about the opportunity to purchase cheaper alcohol and cigarettes, which was seen as a bonus while they were on a short break but not a genuine motivator for going on a short break.

### 5.3 How do they find out about destinations?

One of the key elements for the choice of destination is the fact that there is not a lot of spare time on a short break so travelling time has to be kept to a minimum. For the majority of respondents this means most places within Europe.

Many of the British respondents preferred to go abroad for a short break as the UK does not provide them with that much of a difference from their everyday lives.

The choice of destination can be influenced by many factors:

- *Recommendations from friends and family* – this can be especially valuable when those making the recommendation have similar interests.
- *Where they can get to from their local area* – especially those flying prefer to travel from their local airports, many of which have a limited choice of direct flights.
- *Television programmes* – dedicated travel shows or in the news.
- *Newspapers and magazines* – this can include reviews as well as adverts.

- *Internet* – searched for area information as well as specific searched for flights & accommodation.
- *Club/ hobby/ sports magazines* – e.g. Angling Times, Caravan Club, Wine Club.
- *Deal or promotion* – this may prompt consideration of a destination but it is not always the carrier advertising the deal that is used.
- *Urban vs. Rural* – this choice is reflected in what respondents seek from a short break; cities are associated with experiencing the culture and having a more active break while the rural destinations provide a relaxing break.
- *Travelling with children* – there tends to be specific requirements when considering destinations. Respondents prefer to travel by car as this often works out cheaper and easier for them. The destination can't be too far away as they don't want a long journey with children and the destination has to offer a range of activities to keep the children occupied e.g. theme park, zoo. Convenience is not a motivator, but it is a factor in the final decision.
- *Travelling in a campervan* – respondents generally require a campsite in the area they wish to visit providing a safe environment to stay (wild camping outside the UK was considered by some to be unsafe). The specific facilities available at the campsite can also be an important consideration e.g. shower block, easy access to the local area (taxi/ public transport).

## 5.4 Have economic factors affected the short break market?

Most people felt they were travelling more now than they used to. Travel is generally seen as more affordable; a results of an increase in income and the availability of cheap deals.

It is different for people with children. They feel they are travelling less as it is impractical with young children (expensive and time consuming). Some respondents with children are taking short breaks without their children.

### 5.4.1 Terrorism

The British and French are a resilient group and terrorist attacks have not changed the frequency of travel or the destinations they would go to in Europe. However, many indicated they would not travel to any of the current trouble spots (e.g. Middle East). The French respondents have not been put off coming to London and the British have not been put off going to New York both of which have seen major terrorist attacks.

### 5.4.2 The Euro

The British feel that the Euro has made travelling and spending across Europe more straight forward. Some feel that with the exchange rate it has made travel more expensive. For the French it has had a positive impact in terms of they know how much they are spending when in any of the Euro zone countries. Some feel that it feels like they are not abroad, that changing money makes you feel like you are going to a different country.

### 5.4.3 Foot & Mouth and Bird Flu

This has not affected anyone's travel plans.

### 5.4.4 Strikes/ Riots

Some of the respondents had been affected when travelling by ferry. Most check carefully and would try to avoid travel at times when strikes are planned. A few said they would not consider visiting Paris at the current time.

#### 5.4.5 Abolition of intra-EU duty free

Was not thought to have changed people's travel behaviour, but some noticed that the offering onboard ferries has decreased.

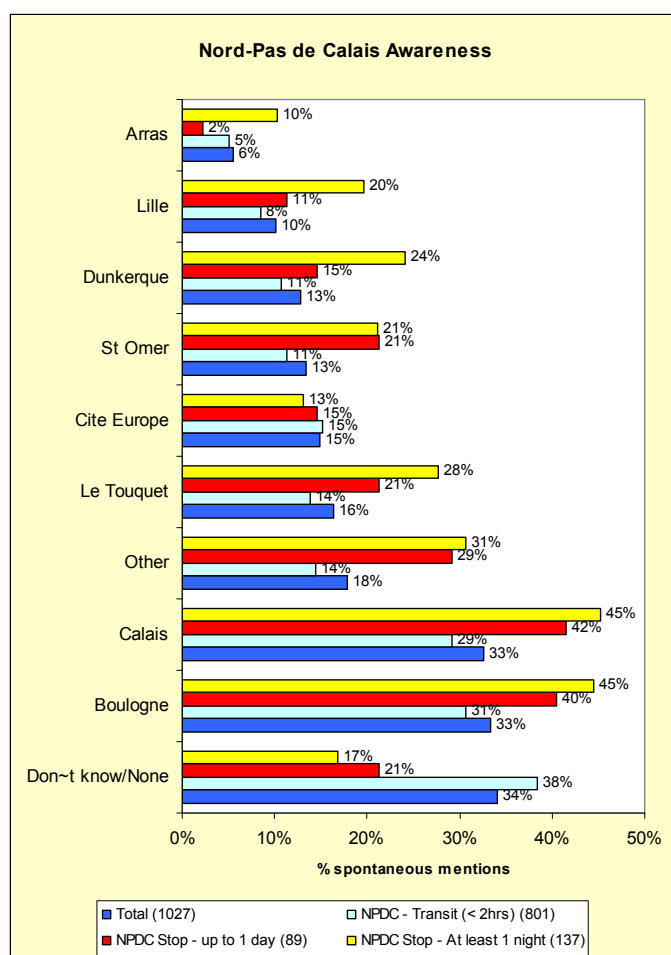
## 6 Visitors to Nord Pas de Calais

### 6.1 Perceptions and Awareness of the Region

Awareness is one of the key factors affecting people’s perception of Nord-Pas de Calais. From the focus group research there was a general lack of knowledge about the region in terms of what towns and cities were contained within it as well as what there was to see and do there.

A common problem about travel is that people generally focus on the names of the major towns rather than the name of the region. (e.g. One member of a focus group could not name anywhere in Nord-Pas de Calais and it later transpired that she had been to Le Touquet but did not know what region it was in.)

**Figure 6.1: Spontaneous mentions of places to visit for a holiday or day out in NPdC**



Base: All respondents – Stage 2 (Telephone interviews)

Awareness has decreased since the last survey when only 12% could not name anywhere within the region for a holiday or day out. There are some possible explanations behind this decline. One may be that there is an abundance of marketing material for travel and tourism in general that people are not noticing the ones for the destinations in Nord-Pas de Calais amongst all the others. There is also a higher proportion of people transiting through the region so maybe they are paying less attention to the places en route to their final destination.

There are generally 2 conflicting views about the region – one quite complimentary from people who know the most about the region and one quite negative from people with little experience of the region. As the quantitative elements of the research were conducted among Cross Channel passengers, all of them had at least transited through the 2 regions so are likely to have more awareness than many people who have not crossed the Channel between Kent and Nord-Pas de Calais.

When presented with the name 'Nord-Pas de Calais' the usual reaction from the focus groups was to focus on the 'Calais' element and then talk about their perceptions of this town.

Even from the quantitative results there was still a high lack of awareness about places within the region. 34% of the total stage 2 sample could not name anywhere within the region for a holiday or day out. Of the places that did get a mention it was the main arrival and departure points and some of the main towns in the region.

Although awareness levels are lower than five years ago it is still the main access points from the Channel crossing and the main towns in the region that people are most aware of.

Awareness levels were higher for people who stayed in the region compared to those who just stop for the day or transit through the region.

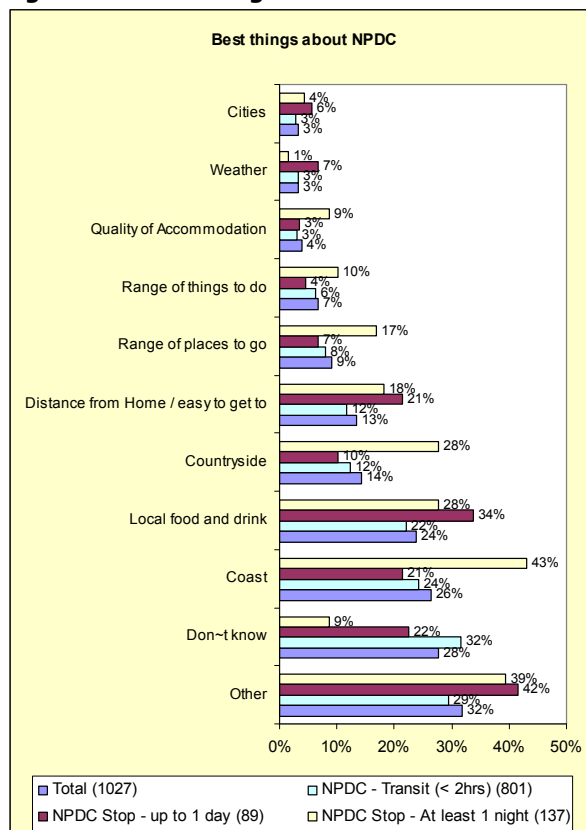
The positive perceptions of the region from the focus groups revolved around the pretty countryside, good beaches, good food and drink and good value shopping. It was also appealing to the British because it offers a very different culture just a short distance from the UK.

The quantitative element of the research backs up some of the perceptions from the focus groups. Given a prescribed list the best things about Nord-Pas de Calais is the coast, the local food and drink and the countryside. Some of the important 'other' reasons given related to shopping and value for money.

In the last survey the coast was less appealing than the countryside for the British. They found the shopping, food and the countryside to be the best things about the region.

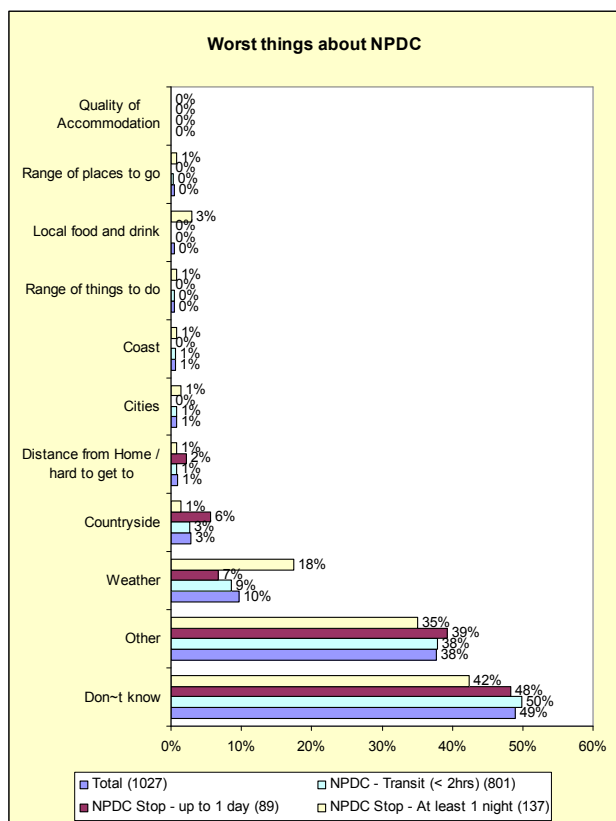
People who stay in the region are more complimentary about the coast and the countryside, while those who stop in the region for up to 1 day think the shopping and the food and drink and the best things. Transit travellers, who have the least awareness about the region, find it more difficult to comment on the best aspects, due to the lack of knowledge or experience they have of the region.

Figure 6.2: Best things about NPdC



Base: All respondents – Stage 2 (Telephone interviews)

**Figure 6.3: Worst things about NPdC**



Base: All respondents – Stage 2 (Telephone interviews)

of negative reasons related to security concerns, especially around Calais, as a result of asylum seekers.

The negative perceptions of the region tend to focus on Calais itself as respondents cited a very industrial port that is dreary, has lots of hypermarkets and has flat boring countryside with similar weather to the UK.

The quantitative element highlights the lack of awareness about the region as 50% of all respondents could not give an answer for the worst thing about Nord-Pas de Calais. This is similar to the last wave when 46% of the British could not give an answer for the worst thing about the region.

From the prescribed list, weather was the main criticism about the region, particularly from those people who stayed there.

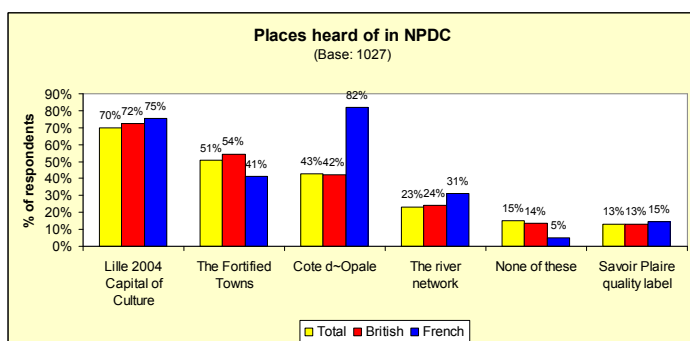
Many respondents gave an answer in the 'other' category and by far the main reason was the industrial image. One of the other notable reasons given in this category was the perception that there are too many Brits in the region and a result could be the lack of the typical French experience that many short break travellers are seeking. A number

The industrial image was the main negative perception of the region from five years ago followed by boring or unattractive countryside.

With the many travellers entering France from a ferry port and getting straight onto a motorway that runs through flat countryside, this might be the only image they have of the region. Advertising on the ferry or on the roads close to the ferry ports with attractive images of other areas within the region might help to change their opinions.

## 6.2 Awareness of Key Events & Names

**Figure 6.4: Awareness of names & events in NPdC**



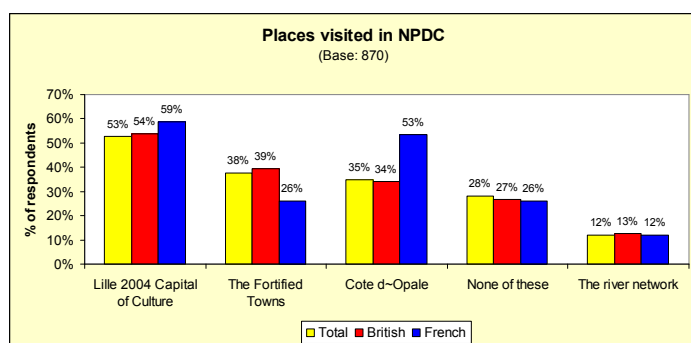
Base: All respondents – Stage 2 (Telephone interviews)

Respondents were asked about their awareness and visit levels to some of the key events or places within Nord-Pas de Calais.

Lille 2004 Capital of Culture was the most widely known and visited, although it is felt that awareness has been overstated and that respondents are focusing on Lille rather than '2004 Capital of Culture'.

Elements with French names were

**Figure 6.5: Visits to key names & events**



Base: All respondents – Stage 2 (Telephone interviews)

most widely known by the French, who naturally understand the meaning, and less so by the British.

The Savoir Plaire quality label has very low awareness among all nationalities.

## Characteristics of Visits

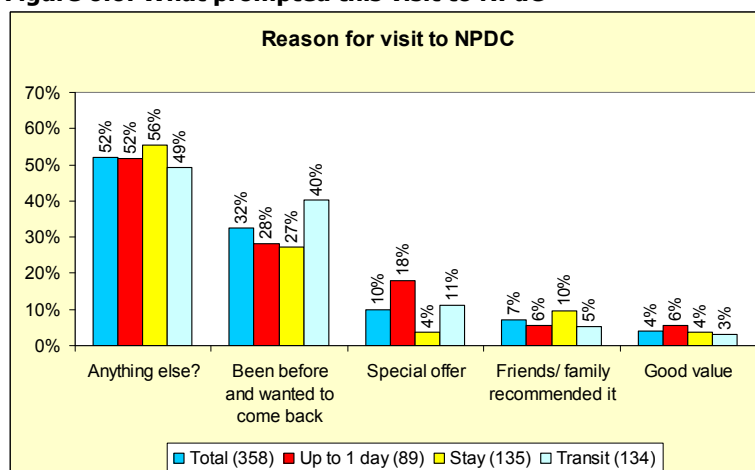
### 6.3 What prompted the visit?

Previous experience is the main reason given for this trip to Nord-Pas de Calais from the prescribed list offered to respondents.

Shopping is a very important factor in encouraging people to visit the region. 54% of the 'anything else' responses related to shopping/ 'booze cruise'.

Special offers were a motivator for 18% of the people who stopped in the region for up to one day.

**Figure 6.6: What prompted this visit to NPdC**



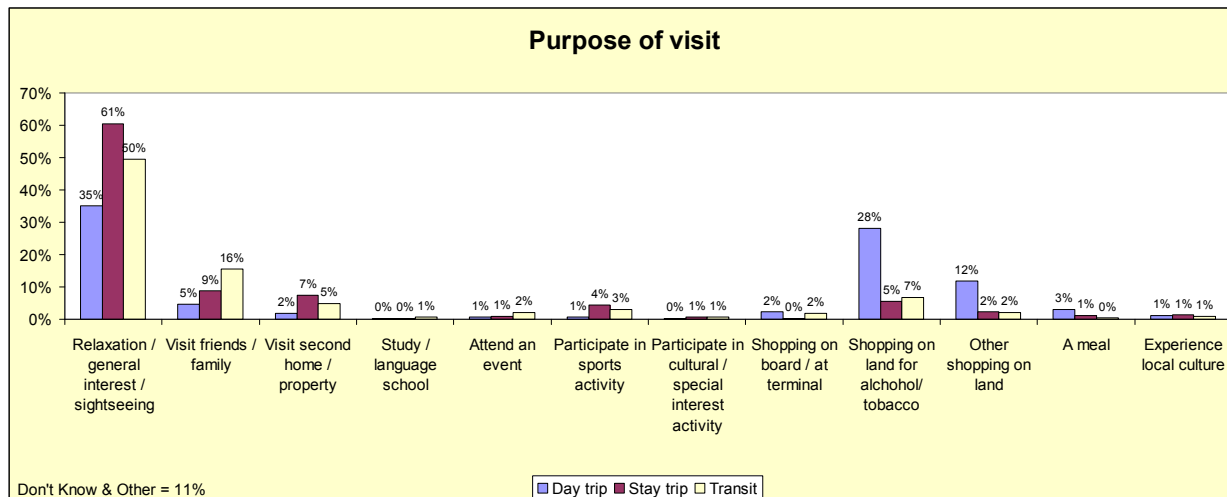
Base: All stopping in NPdC – Stage 2 (Telephone interviews)

Shopping and previous visits were the most common reasons given in the survey five years ago. 45% of day visitors were prompted to visit by the shopping and 32% were prompted by their previous experience. Special offers were the third most common reason for visiting five years ago among day visitors. From this it can be seen that the motivations for visiting Nord-Pas de Calais have not changed much over the past five years.

### 6.4 Purpose of Trip

Relaxation/ general interest/ sightseeing is the most common purpose of trips to Nord-Pas de Calais.

**Figure 6.7: Purpose of trip by duration**



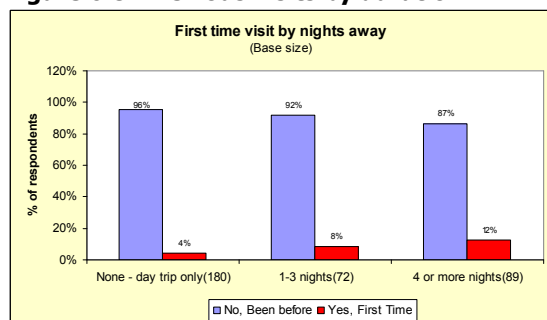
**Base: All passing through NPdC – Stage 1 (11,417)**

As can be seen from the above chart, shopping (especially for alcohol or tobacco) is the most popular activity for day trippers. When the purpose figures are indexed against the total, day trippers are between 2 and 3 times more likely to be going to Nord-Pas de Calais for shopping or a meal than other types of traveller.

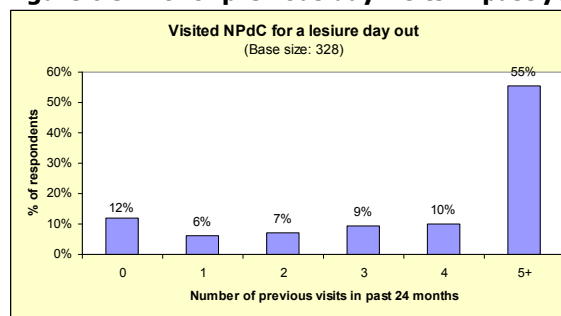
### 6.5 Frequency & duration of trips to the region in last 2 years

Almost all the visitors (92%) to Nord-Pas de Calais have visited the region previously in the past 2 years. Those who are visiting the region for a day trip are slightly more likely than staying visitors to have visited previously. It is a high frequency destination for 55% of the current visitors who have visited on more than 5 previous occasions for day trips in the past 2 years. This suggests that the region is not a tourist destination but a destination for regular shopping trips. The results from the last survey highlight this point as 52% of day trip visitors five years ago had visited Nord-Pas de Calais for a day trip on three or more previous occasions in the previous year.

**Figure 6.8: Previous visits by duration**



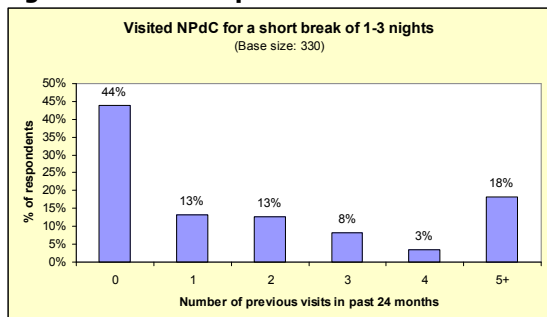
**Figure 6.9: No. of previous day visits in past year**



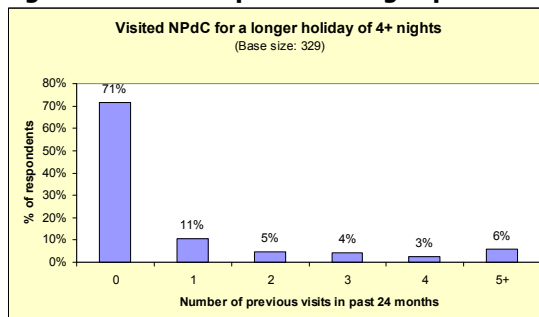
**Base: All stopping in NPdC – Stage 2 (Telephone interviews)**

Day trips are the most common type of visit. Previous visits for 1-3 nights are more popular than previous visits of over 4 nights.

**Figure 6.10: No. of previous short breaks**



**Figure 6.11: No. of previous long trips**



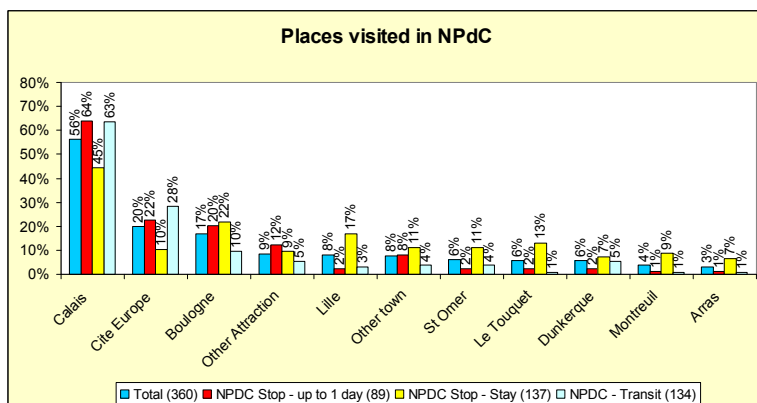
**Base: All stopping in NPdC – Stage 2 (Telephone interviews)**

## 6.6 Places visited & Places spent most time at

The majority of visitors to the region are staying close to the access points near the coast. With most visitors arriving in Calais it has the highest proportion of visitors followed by the shopping area of Cite Europe. Transit visitors (those stopping for under 2 hours) just stop for a refreshment break or to stock up on some shopping before moving on.

Staying visitors in the region are naturally going to be visiting more of the towns, especially those inland.

**Figure 6.12: Places visited in NPdC**



**Base: All stopping in NPdC – Stage 2 (Telephone interviews)**

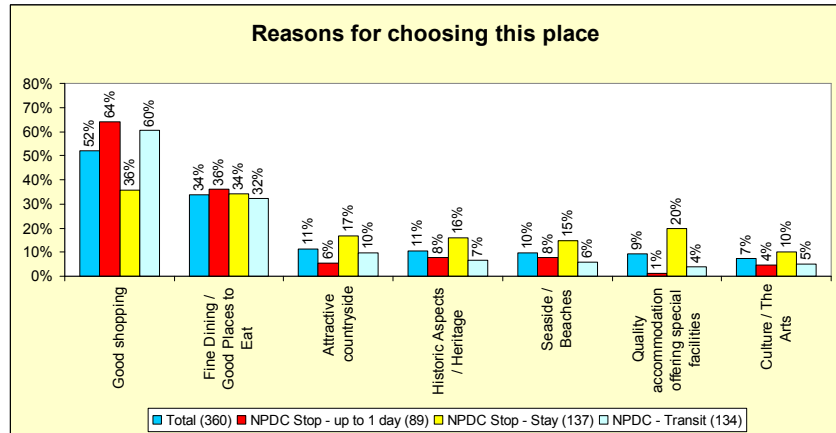
Day visitors and transit visitors spend most of their time at Cite Europe, which is unsurprising as they key motivation for day visitors is the hypermarkets and other shops.

Over the past 5 years the picture has not changed considerably in terms of the places people are visiting in the region. Calais was visited by 69% of day visitors and was by far the most popular place for a day visit. For staying visitors five years ago Calais (33%), Boulogne (26%) and Le Touquet (22%) were the most popular followed by Lille (15%) and St Omer (13%). As can be seen in the above chart Lille has increased slightly in popularity.

## 6.7 Reasons for choosing & influencing factors

The main reason for choosing to go to Calais and Cite Europe is for the shopping. Shopping still ranks as the most important factor for staying visitors when it comes to why they chose to visit the places they did but it is less important compared to the day and transit visitors. Other reasons gain in importance for the staying visitors, including the countryside, the history & heritage and the quality of the accommodation.

**Figure 6.13: Reasons for visiting the places you chose**

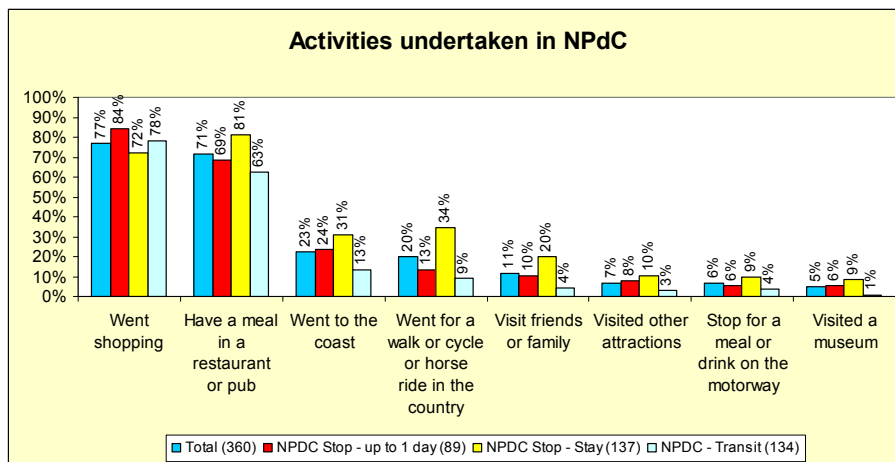


**Base: All stopping in NPdC – Stage 2 (Telephone interviews)**

## 6.8 Activities undertaken

The 2 key activities undertaken by all types of visitor to Nord-Pas de Calais are shopping and eating. This does not come as a surprise as the motivating factors to visit the region are driven by the good value shopping and the good French restaurants.

**Figure 6.14: Activities undertaken in NPdC**



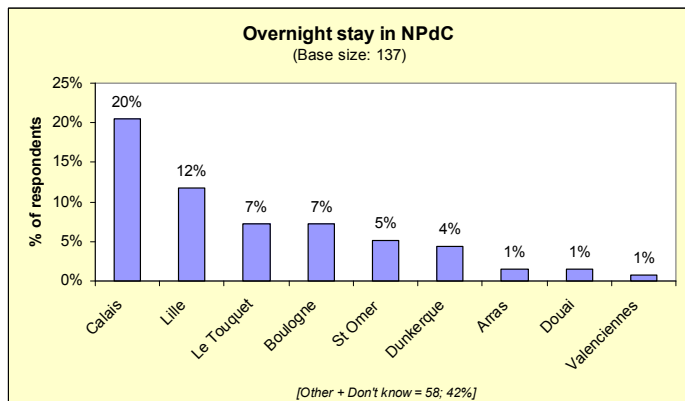
**Base: All stopping in NPdC – Stage 2 (Telephone interviews)**

Staying visitors are naturally more active during their trip and are more inclined to visit the coast or go for walks in the country, but after they have done some shopping and eating.

## 6.9 Where stayed

The main towns in the region are where the majority of staying visitors spend their nights with Calais and Lille being the 2 most popular.

**Figure 6.15: Where did you stay in NPdC**



**Base: All stopping in NPdC – Stage 2 (Telephone interviews)**

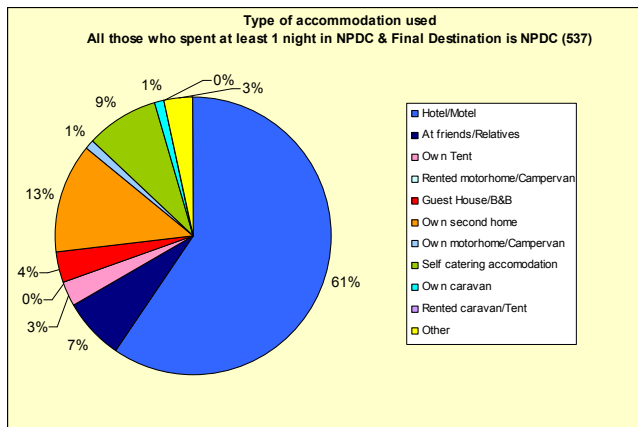
seeing a rise in popularity of trips to Lille, but this seems more evident in the non-staying market.

Lille has the potential to rise in popularity as a city break destination with its direct transport links from the UK. A slightly higher proportion is visiting now compared to 5 years ago but the proportion staying there remains at a similar level. Comparing the last survey's results on a like for like basis (removing the unknowns from the analysis) a very similar proportion are staying in Lille (14% in 2000 and 13% in 2006). Speaking to a small number of coach operators some indicated that they were

### 6.10 Type of accommodation

Hotels or motels are the accommodation of choice for people staying in Nord-Pas de Calais. Other popular choices are a second home in the region, staying with friends or relatives and self catering accommodation.

**Figure 6.16: Type of accommodation used in NPdC**



**Base: All stopping in NPdC – Stage 2 (Telephone interviews)**

Depending on the time of year, how many nights the trip is for and the group composition, the type of accommodation that people stay in varies.

Hotels and motels are used mainly by couples travelling for one or two nights and have a constant use throughout the year. Their use has become more popular among staying guest in the region as 49% of staying visitors in Nord-Pas de Calais used a hotel five years ago.

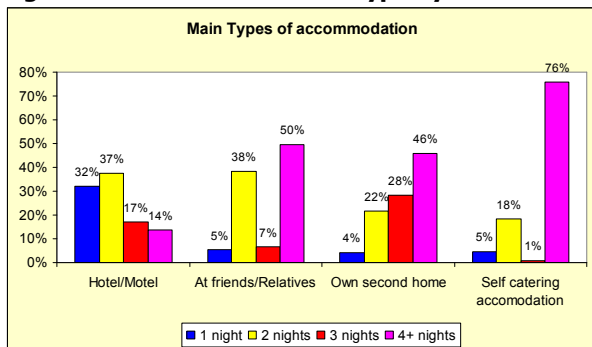
Staying with friends or relatives peaks in the late summer/ autumn period, mostly involves couples or families and tends to be for longer duration trips.

Staying in a second home in the region attracts couples in the summer months and they tend to stay for longer than four nights. Although it looks like a significant proportion of the staying guests are using their own second home the stage one results, with a larger sample, reveal that the proportion is 7% and has not changed over the past five years.

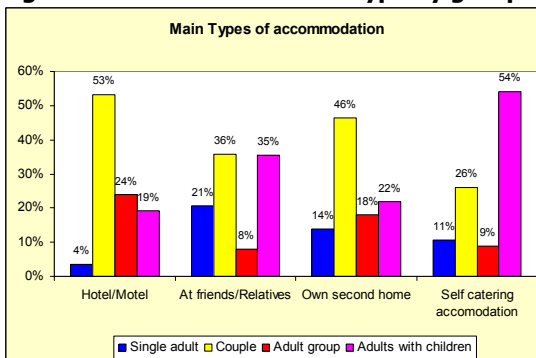
Self catering accommodation is mainly used by families in the summer months staying for longer than four nights.

The following charts highlight these differences for the main types of accommodation used in Nord-Pas de Calais.

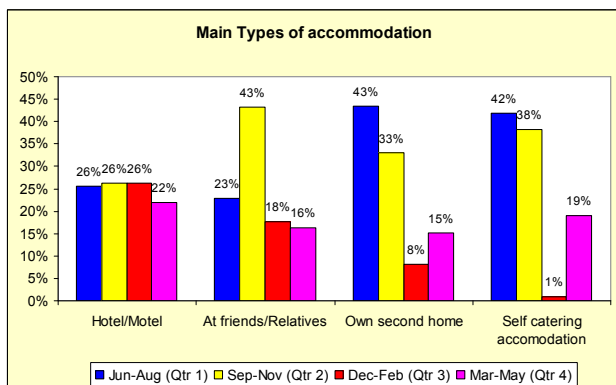
**Figure 6.17: Accommodation type by duration**



**Figure 6.18: Accommodation type by group size**



**Figure 6.19: Accommodation type by quarter**



**Base: All staying overnight in NPdC (137) – Stage 2 (Telephone interviews)**

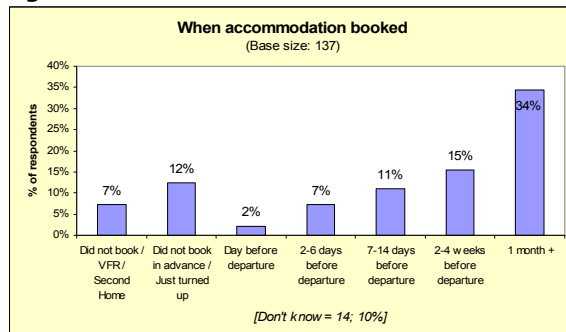
From the focus group research there was some anecdotal evidence to suggest that staying in hotels is perceived as expensive when travelling with children, which is why staying with friends and family or in self catering accommodation seems to be the choice for families.

### 6.11 When booked

For just over a third of staying visitors the accommodation was booked more than 1 month in advance of the trip. For the remainder it is more of a late decision.

The pattern of booking has not changed over the past five years; the majority still book it more than one month in advance.

**Figure 6.20: When was accommodation booked?**

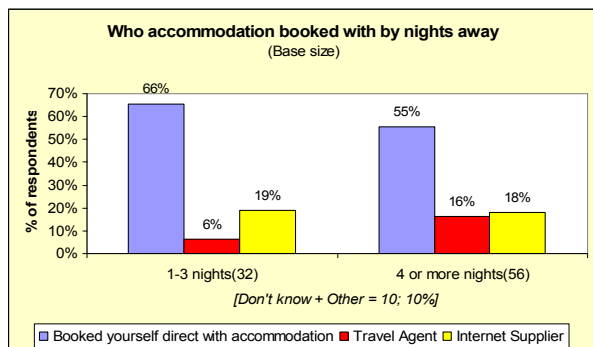


**Base: All staying in NPdC – Stage 2 (Telephone interviews)**

### 6.12 Who booked with & channel used

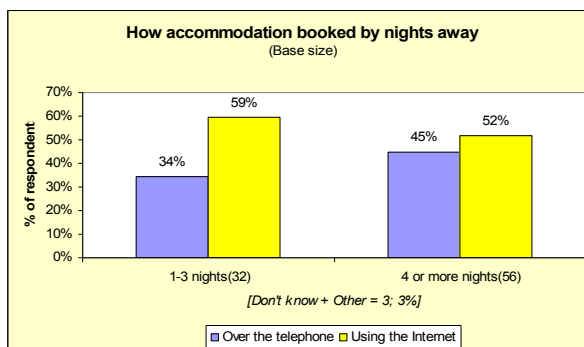
The majority books direct with the accommodation provider and the internet is slightly more popular than the telephone as a booking channel. The telephone is more popular for longer duration stays than it is for short breaks. This is likely to be a factor of people being more demanding or particular the longer their holiday is. If people are spending longer in accommodation and spending more than they would for a short break then they are going to want to know that their individual requirements are being met. Dealing with a human is easier for any special requests than it is going through the internet.

**Figure 6.21: How accommodation was booked**



**Base: All staying in NPdC – Stage 2 (Telephone interviews)**

**Figure 6.22: Channel used to book accommodation**



### 6.13 Usage of the Internet

The internet is becoming the booking channel of choice for the majority of people crossing the channel, especially for the transport element. Practically all of the respondents in the focus groups used the internet to book their trips. Those who did not book online tended to do most of the research online before booking by telephone or in person.

The main reasons for using the internet, as cited by the focus group respondents, is because it is quicker, perceived as cheaper, allows the user to compare prices easily, allows the user to book at a time when it is convenient for them, and has generally become a habit, as they buy other items online.

The internet has become a way of life for much of the population and travel is one of the sectors that has embraced this technology to provide direct access to consumers and cutting out the agents and hence the commission that is paid to them. As more people use the internet to search and book their travel it becomes the norm, especially if they are using that channel to buy other items, search for information and do their banking.

There is still an element of the market that has security concerns about providing their financial details online. These tend to be more traditional and older people. From the Cross Channel analysis, the ArkLeisure segments who are most likely to book online are the Cosmopolitans. There are higher than average Functionals and Habituals on the Cross Channel routes and these are the two segments who are least likely to embrace new technologies and hence are more likely to book via traditional methods.

### 6.14 Duration of Visit

For staying visitors in Nord-Pas de Calais the average number of nights is 3.4.

**Table 6.1: Average number of nights spent in NPdC**

**Mean number of nights in Nord-Pas de Calais**

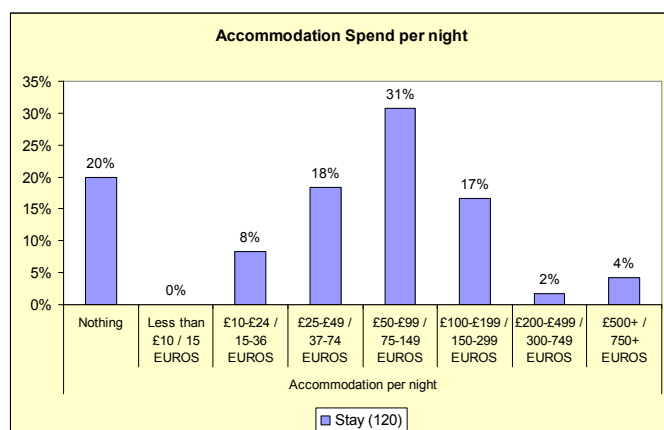
Jun-Aug (Qtr 1)	Sep-Nov (Qtr 2)	Dec-Feb (Qtr 3)	Mar-May (Qtr 4)
4.6	3.0	1.9	3.5

**Base: All staying in NPdC (926) – Stage 1**

The number of nights does vary over the year with the longer durations coming in the summer and the shorter ones in the winter months.

### 6.15 Spending

**Figure 6.23: Accommodation spend per night**

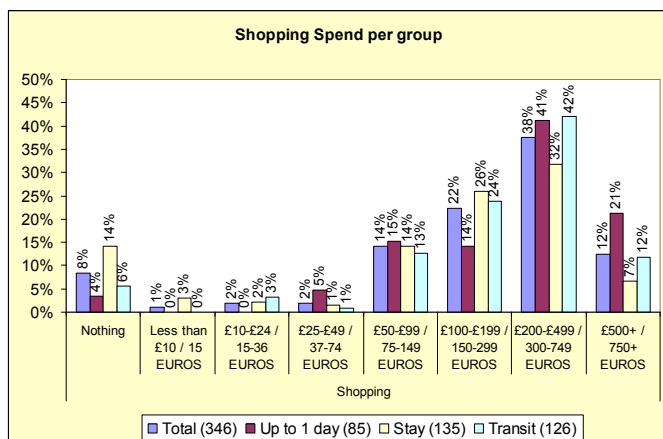


**Base: All staying in NPdC – Stage 2 (Telephone interviews)**

As one of the main purposes and activities undertaken in the region, shopping accounts for the majority of spend among visitors.

Day visitors and those transit visitors stopping for less than 2 hours would appear to be the most lucrative. 62% of day visitors and 54% of visitors stopping less than 2 hours are spending upwards of £200/ €300 on shopping. This compares to just 39% of staying visitors spending over £200/ €300 on shopping.

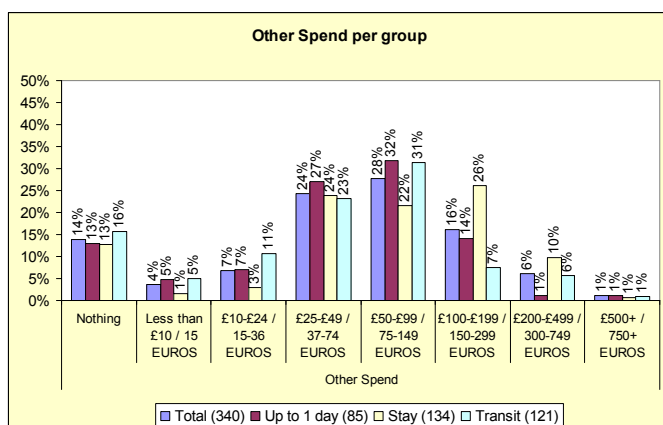
**Figure 6.24: Shopping spend per group**



Staying visitors are spending more on other items, most probably meals and attractions, which is expected as they are in the region for longer than the day visitors. Day visitors do spend money on other items, which is most likely to be meals. Just over 50% of day visitors are spending £25-£99 (€37-€149) on other items.

**Base: All staying in NPdC – Stage 2 (Telephone interviews)**

**Figure 6.25: Other spend per group**



Using the mid point of the spend scales and dividing this by the number of people in the party, an estimate of the average spend per head is derived. The following table demonstrates that people stopping for up to a day are spending significant amounts per head on shopping. Staying visitors are spending less per head on shopping than day visitors but they make up for it by spending more on other items (meals, attractions, etc) and spending on accommodation.

**Base: All staying in NPdC – Stage 2 (Telephone interviews)**

**Table 6.2: Average spend per head in NPdC**

		NPdC					
		Accommodation		Shopping		Other	
		£	€	£	€	£	€
NPdC	Up to 1 day			£116.94	€ 163.72	£27.65	€ 38.71
	Stay	£28.15	€ 39.41	£76.46	€ 107.04	£38.74	€ 54.24
	Transit (< 2hrs)			£101.62	€ 142.27	£26.33	€ 36.86

**Base: All spending in NPdC – Stage 2 (Telephone interviews)**

## Reactions of Visitors

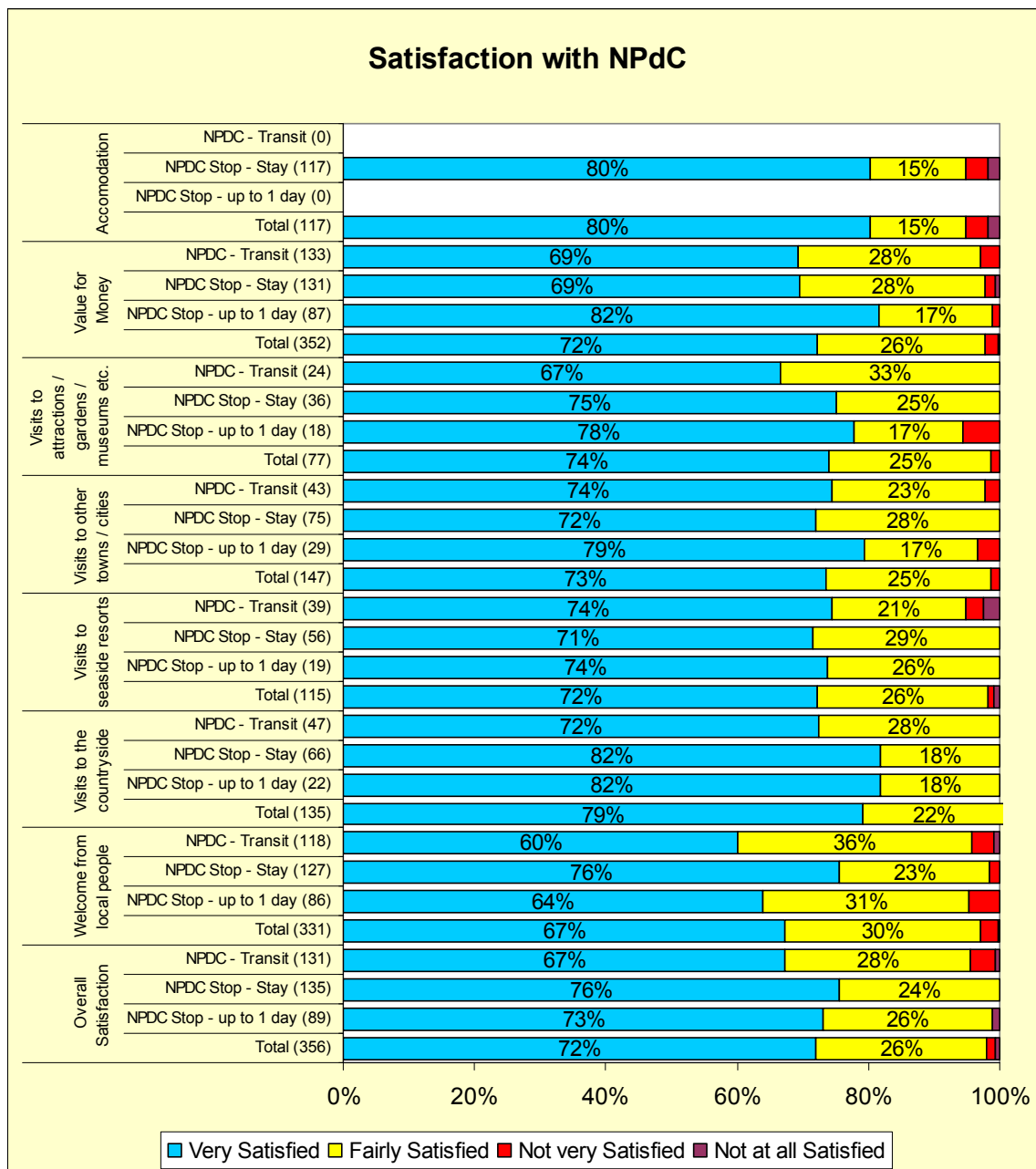
### 6.16 Visitors Satisfaction

In general visitor satisfaction with the region is high.

Day visitors are particularly happy with the value for money, which is one of the key motivators attracting them to the region.

Transit visitors are the most critical of any group, although their satisfaction levels are still high. Where they are critical is about visits to the seaside towns. As has been noted earlier, the seaside town they generally visit is Calais, which seems to have a negative industrial image, so if these people could be persuaded to venture further round the coast from Calais their critical satisfaction ratings are likely to reduce.

**Figure 6.26: Satisfaction scores for NPdC**



**Base: All stopping in NPdC – Stage 2 (Telephone interviews)**

### 6.17 Areas for improvement

Respondents were asked what could have been improved about their visit to Nord-Pas de Calais. The vast majority did not state anything that could have improved their visit. There were a few comments relating to the weather. There were a few comments relating to the quality of the restaurant food going down and the cost going up and some relating to cleaning up the surrounding area but they were few so it suggests that there is little that is obviously wrong or motivated a complaint.

This is quite similar to the last survey, where weather was the main item cited as requiring improvement followed by prices. The cleanliness of the area was also cited by one in 10 visitors to the area five years ago.

## 6.18 Items that attract or prevent people from stopping in the region

The common factor that attracts both the day visitor and the stay visitor is the local restaurants.

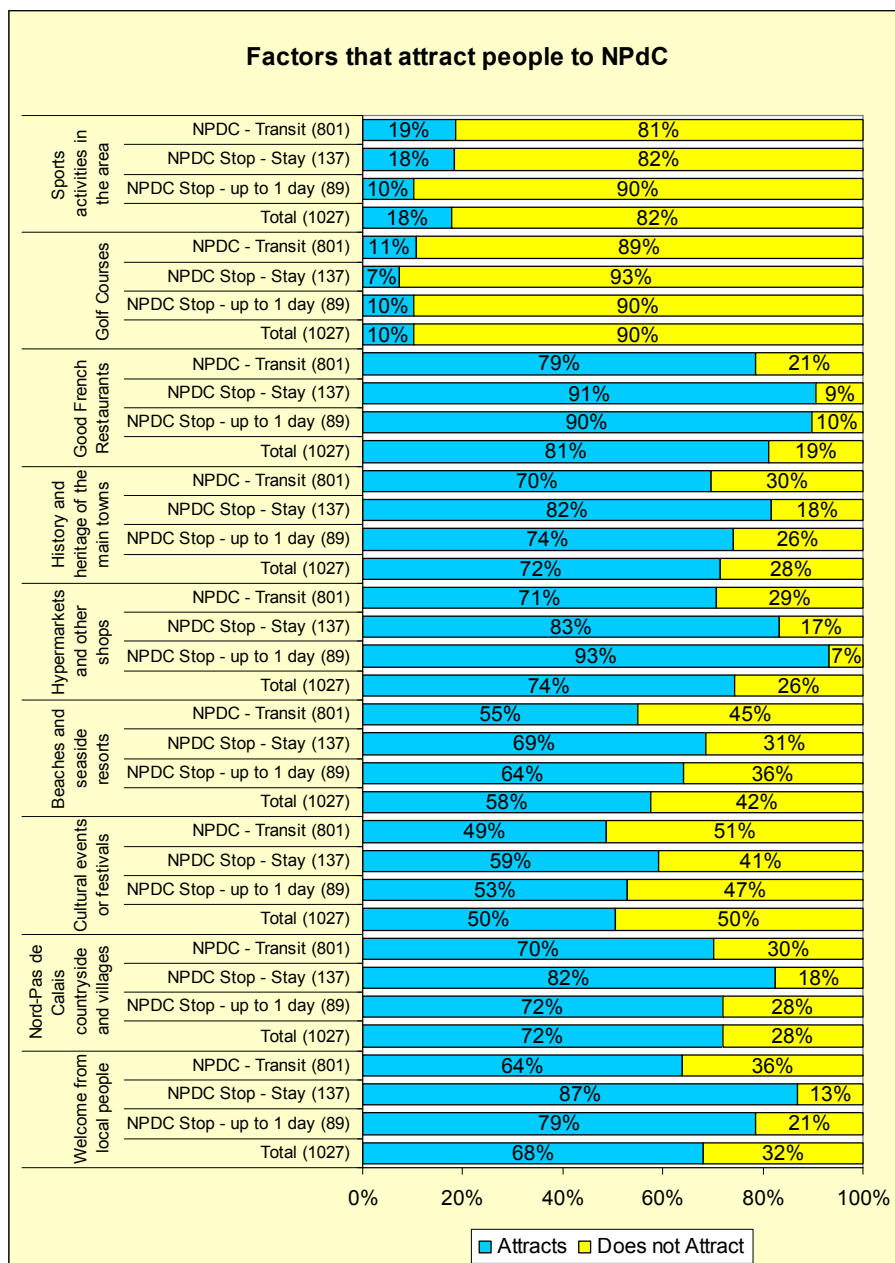
Hypermarkets and other shops are the key attraction for the day visitor.

Stay visitors also find the shopping an important motivator but they consider a range of factors important including the countryside, the history & heritage, the beaches and cultural events.

Sporting activities are not a major attraction for any group.

The following chart highlights which factors are attractions for different types of visitors to the region.

**Figure 6.27: Factors that attract people to NPdC**



**Base: All respondents – Stage 2 (Telephone interviews)**

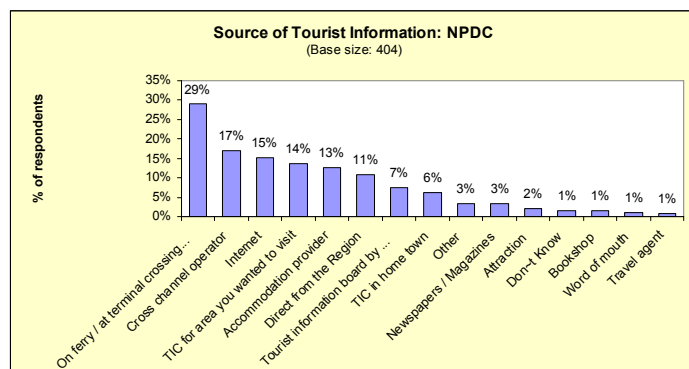
## Response to Marketing

### 6.19 Tourist Information

The longer the stay in the region, the more likely someone is to pick up some tourist information literature. 50% of visitors staying more than half a day picked up some sort of tourist information about the region.

On the ferry or at the terminal before the crossing is the most common place to pick up information. The cross channel carriers seem to be quite proactive in providing their customers with information, as this is the second most common method that visitors received information.

Some people look up information on the internet or go to a tourist information centre.

**Figure 6.28: Where tourist information is obtained from**

**Base: All picking up tourist information – Stage 2 (Telephone interviews)**

The vast majority (69%) of people who collect information are looking for information on places to visit and just over a third are looking for ideas on places to eat.

96% are happy with the information they picked up or received, but the few comments on areas for improvement related to practical information, for example better maps, information on opening times or information about parking.

## 6.20 Marketing literature

During the focus groups various pieces of marketing literature relating to Nord-Pas de Calais were tested in order to get the respondents opinions. The opinions about these pieces of literature are based on a maximum of 48 individuals so it should only be used as a guide to perceptions and not a robust set of results. There were 4 key pieces:

- “Real France Real Close” – square, blue coloured cover and introduces the reader to the region with specific sections covering, culture, gastronomy, shopping, family days, etc.

This guide is generally regarded as the best of the 4 pieces tested. It is seen as easy to read, well sectioned, bright and inviting. It is informative and easy to find what you are looking for. It was also seen to be up to date and refreshed annually because of the ‘2005-2006’ on the cover.

For those that did not know much about the region, this guide improved their perceptions.

If there are to be any improvements made to this guide the suggestions put forward include making it physically smaller in size (to the same size as the Savoir Plaire directory) and to include a better map.

- Savoir Plaire 2006 – a pocket sized directory listing accommodations, attractions and restaurants that are part of this tourist quality scheme.

There was a general feeling of disappointment from this guide. It was perceived to be just a book of lists and it does not tell you anything about the area. It was seen as not very tourist friendly. Another issue with this is that the name ‘Savoir Plaire’ is not known or understood by the British public. None of the focus group respondents were aware of it and quantitatively, only 2% of staying visitors were aware that their accommodation was labelled Savoir Plaire.

Ideas that were suggested for a guide of this size would be to have a town per page and provide details of what there is to see and do there. It would operate in a similar manner to the “Real France Real Close” guide, but that is based around themes and this would be based around destinations.

- Welcome Map – a green covered pocket sized fold out map of the region with pictures and ideas of places to visit on the reverse.

There was not a lot of detail about this map. It serves its purpose well and the few comments related to it being difficult to fold, especially if driving and the quality of the paper was not seen as good (but on the positive side it could be written on).

Most people thought that if they were to be driving in the region they would have a road atlas with them.

- Fortified Towns Map – A pocket sized fold out map with information surrounding the map of towns of interest because of their fortified attractions and a list of activities and attractions in the main towns on the reverse.

Among the group respondents this map had limited interest, but a few respondents recognised that it illustrated that there are a few nice places to visit. It is perceived to be geared towards a specific market.

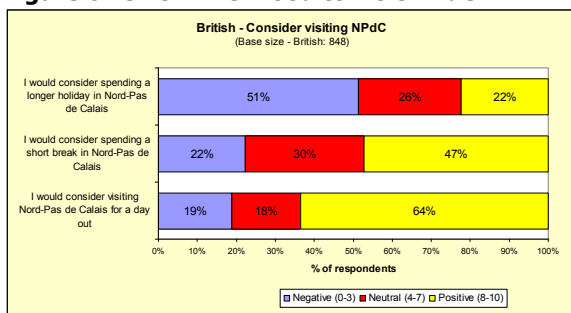
During the groups the literature was talked about individually, but the respondents recognised that they would be more than likely to pick up many pieces of literature and then discard the ones they did not need or want later, and take what they need from each leaflet.

### 6.21 Likelihood of future visits

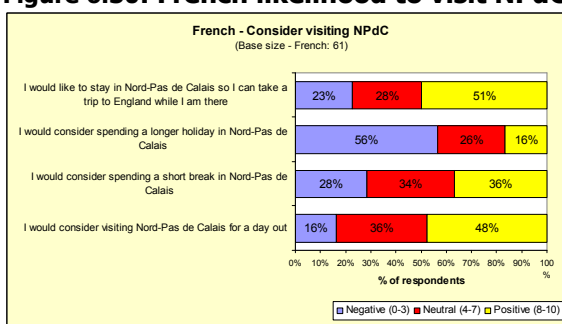
The British are most likely to consider visiting Nord-Pas de Calais for a day trip rather than longer staying trips. The closer someone lives to the crossing point the more likely they are to consider visiting for a day trip. This essentially identifies two separate markets; a holiday market and a shoppers market.

Just over half the French would consider staying in Nord-Pas de Calais so they can visit England while they are there. This would then make Nord-Pas de Calais a holiday destination and result in significant spend.

**Figure 6.29: UK likelihood to visit NPdC**



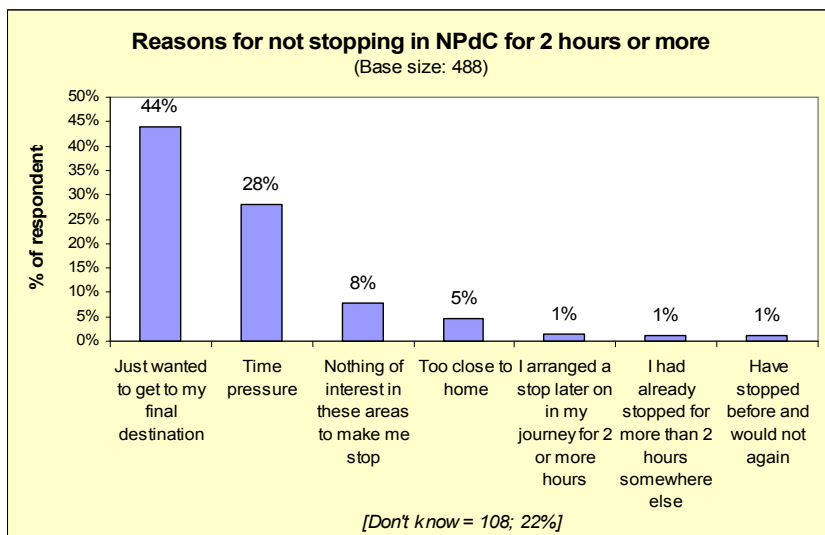
**Figure 6.30: French likelihood to visit NPdC**



**Base: Stage 2 (Telephone interviews)**

It is most likely people who have visited the region before that will stop in the future. 46% of those who did not stop on this trip stated that they would in future but 95% stated it would most likely be for a day trip. A third of those who did not stop this time stated that they were undecided about stopping in future, so there is some scope to encourage them.

**Figure 6.31: Reason for not stopping in NPdC**



**Base: Those not stopping in NPdC – Stage 2 (Telephone interviews)**

Those who did not stop on this trip were asked why they didn't stop and what would encourage them to stop in the future. Most were not stopping because they just wanted to get to their final destination or because of time pressures. From the focus group element respondents indicated that if they had a longer distance to travel they are more likely to pick a spot to break their journey using a map and picking somewhere a decent distance between their origin point and their

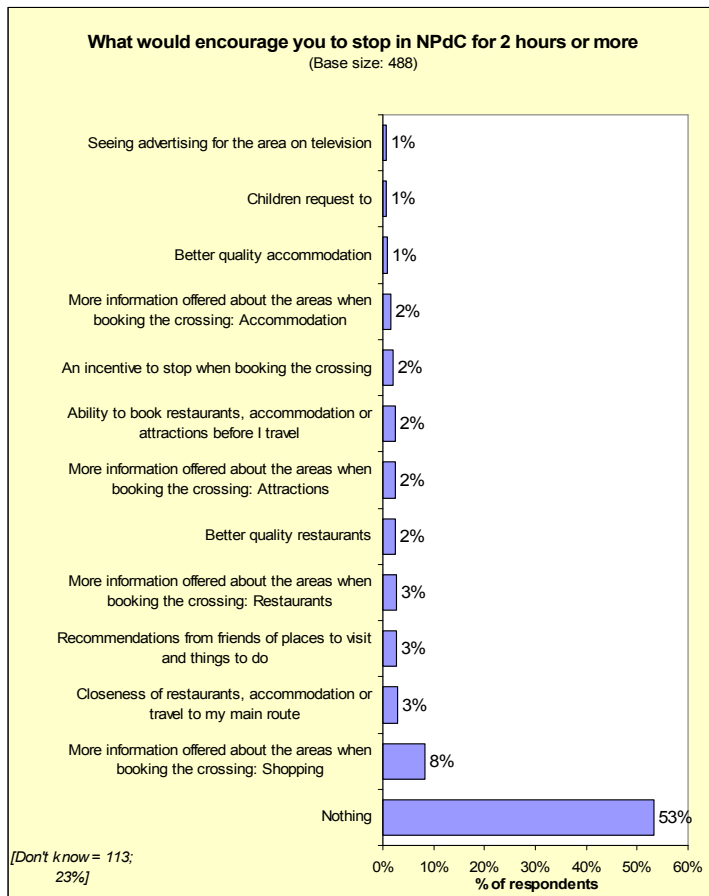
destination. Many felt that if they are crossing on a ferry they have had time to relax or stretch their legs so a stop in Nord-Pas de Calais would be too soon. Perhaps a way to get them to stop is to get them to arrive early for their return crossing to the UK.

These are very rational or functional reasons for not stopping, which are very difficult to influence. All that can be done is to increase the perceived benefits of stopping to change the cost/ benefit assessment of transit travellers.

More than half stated there was 'Nothing' that would encourage them to stop in the region. The second most popular answer was 'don't know' highlighting the lack of awareness there is about the region. There is a perception that the region offers mainly shopping, as the main specific reason is more information about the shopping.

On a positive note, only 8% felt that there was nothing in the area of interest to them.

**Figure 6.32: What would encourage a stop in NPdC**



**Base: Those not stopping in NPdC – Stage 2 (Telephone interviews)**

## 7 Visitors to Kent

### 7.1 Perceptions and Awareness of the Region

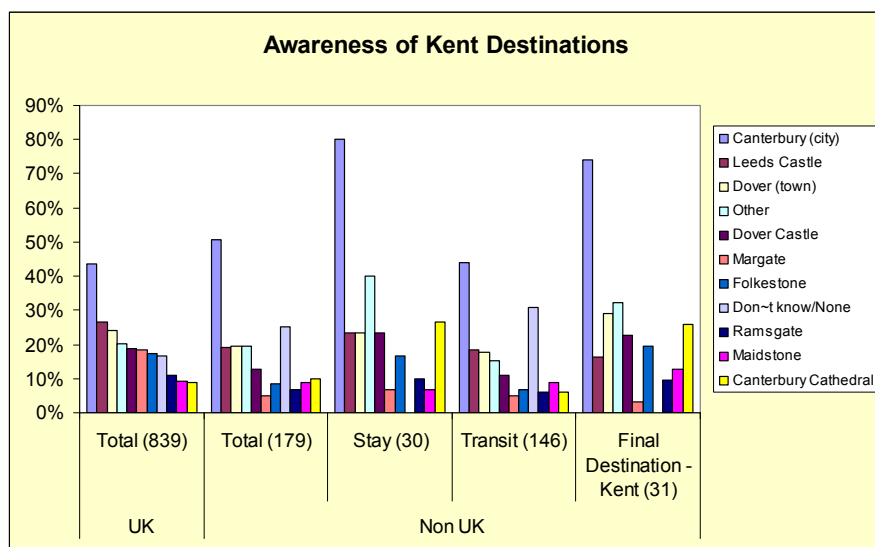
Awareness is one of the key factors affecting people’s perception of Kent. Although there was only one focus group in France with people who had travelled to the UK but not stopped in Kent it was clear that there was an awareness problem among this group of individuals.

In a similar manner to Nord-Pas de Calais there are conflicting perceptions of Kent depending on whether people have visited the region.

As mentioned earlier in the report, people are more likely to associate their travel and knowledge to the names of towns and cities they have visited or would like to visit rather than the name of the region. As such, the group who had not stopped in Kent were unable to name any towns or cities in the region.

With the exception of Canterbury, awareness of places within Kent is generally low. Even for those whose final destination was Kent found it difficult to name somewhere other than Canterbury. Non UK transit travellers obviously have less knowledge of the region than those who have stayed there.

**Figure 7.1: Spontaneous mention of places to visit for a holiday or day out**



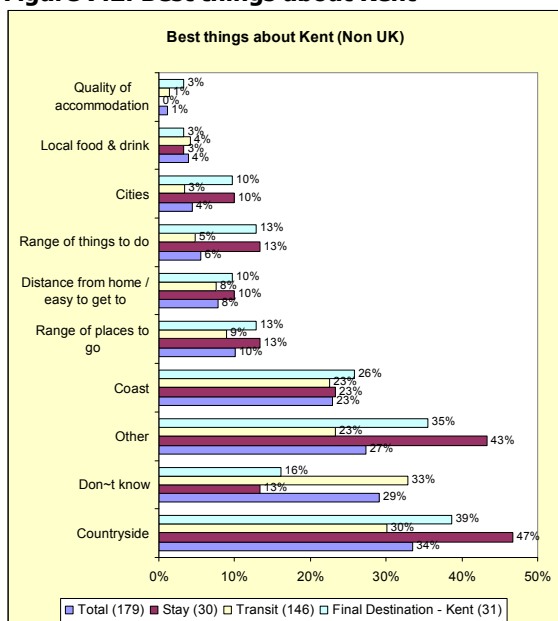
**Base: All respondents – Stage 2 (Telephone interviews)**

The focus group with the least awareness of Kent had a perception of an empty space that is old fashioned and has poor food. This is mainly due to not having seen or heard anything about the region so they do not have anything to base their perceptions on.

In terms of travel to Britain the perception is a country that is very expensive for accommodation, public transport and food. To make things worse, the quality of the accommodation and food is also not regarded highly. On the positive side, they do like the different culture (including the pub culture) and the history & heritage and museums.

The quantitative stages of the project go some way to backing up the views of the limited number of people from the focus groups.

**Figure 7.2: Best things about Kent**

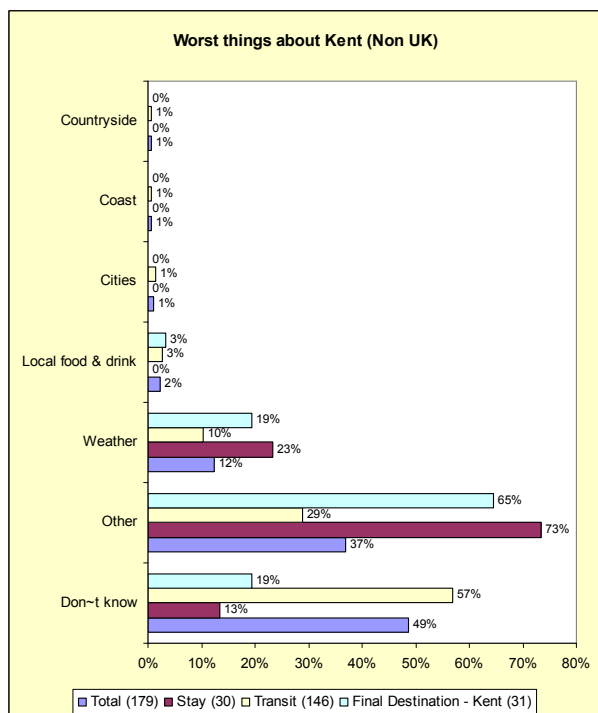


**Base: Non UK Respondents – Stage 2 (Telephone interviews)**

The best things about Kent are perceived to be the countryside and the coast, especially for the non UK staying visitors. A popular 'other' reason given by this group is the history and heritage of the region. From a UK perspective, respondents like Kent because of its proximity to the continent and its good weather.

Given that Kent has not changed considerably over the past five years it is not surprising to see the two main factors that attracted people in the last survey were the countryside and the history and heritage.

**Figure 7.3: Worst things about Kent**



**Base: Non UK Respondents – Stage 2 (Telephone interviews)**  
respondents.

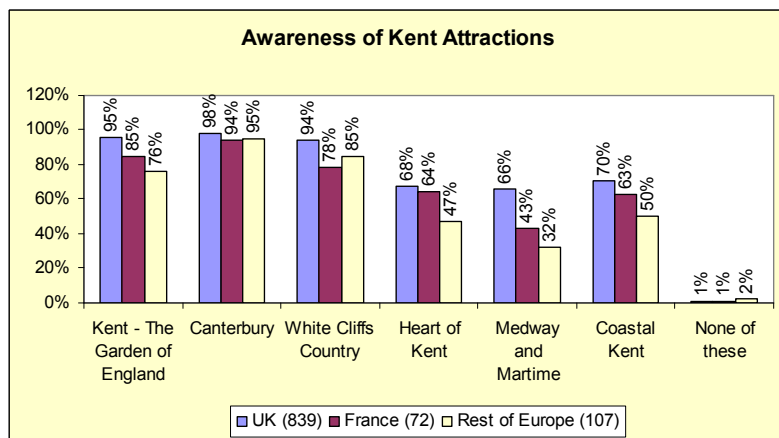
On the reverse side, the worst things about Kent from non-UK respondents' perspective are the weather and how expensive it is. These factors are particularly strong for the staying visitors. The high cost of living was the main reason given in the 'other' category. Another reason was the large amount of traffic and people causing congestion. The lack of awareness means that there is a high proportion that cannot give a reason for the worst thing about Kent.

By far the greatest criticism from UK respondents is the traffic and congestion in the region. Respondents from further afield criticised the M25 and it seems to be an obstacle that UK visitors have to overcome to get to the region.

Five years ago the main criticism of UK respondents was the traffic in the region. From a non-UK perspective the main criticism was prices, weather and traffic, but these were mentioned by less than 10% of non-UK

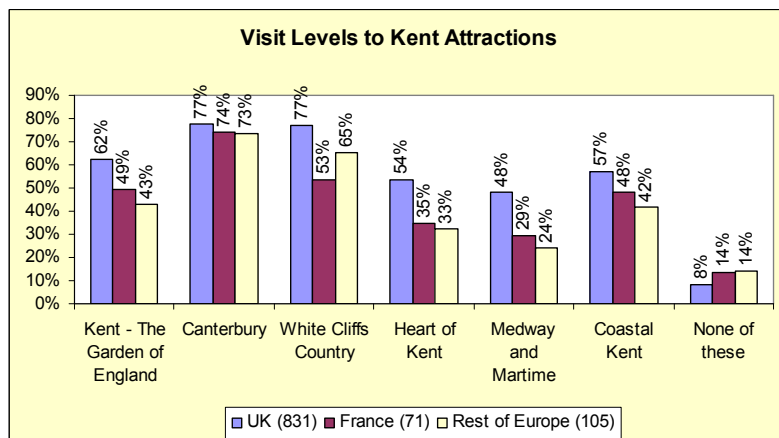
## 7.2 Awareness and Visits to Key Kent Attractions

**Figure 7.4: Awareness of specific Kent names & attractions**



Base: All Respondents – Stage 2 (Telephone interviews)

**Figure 7.5: Visit levels to specific Kent names & attractions**



Base: All Respondents – Stage 2 (Telephone interviews)

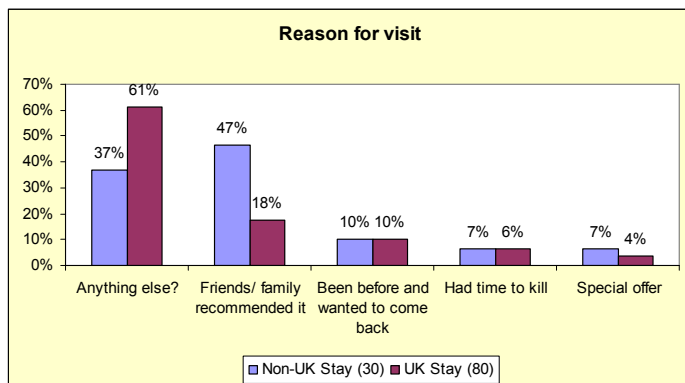
Respondents were asked if they had heard of some of the key tourist names used in Kent and whether they had visited any of these areas.

Canterbury, The Garden of England and White Cliffs Country have good levels of awareness. Canterbury has good visit levels across all nationalities. The key difference is that Canterbury is an actual city whereas the Garden of England and White Cliffs Country do not have that same geographical status on maps so many people are unlikely to know if they have actually visited these areas.

## Characteristics of Visits

### 7.3 What prompted the visit?

**Figure 7.6: Main reason for this visit to Kent**



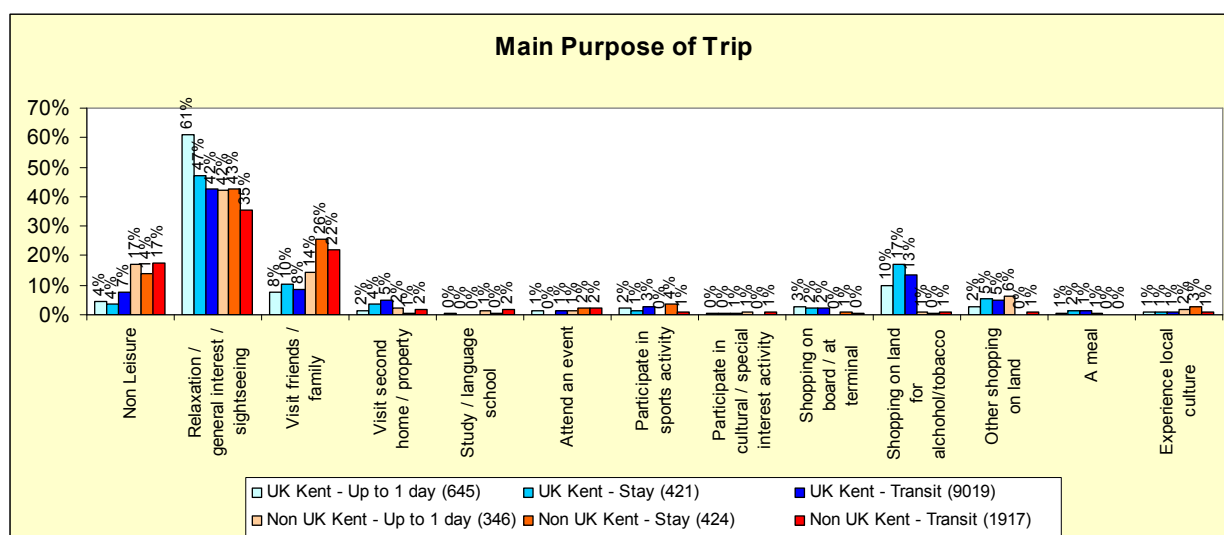
Base: All staying in Kent – Stage 2 (Telephone interviews)

Friends and family are a major influence in people staying in Kent. A recommendation is the main reason non UK staying visitors come to Kent and 27% of the 'anything else' comments for the UK respondents related to visiting friends or family. The main reason for visiting Kent among UK staying visitors is because it is convenient for the Channel crossing, which was the most popular answer in the 'anything else' comments.

The main motivations drawing people to Kent is less to do with the attractions and general appeal of the county and more to do with catching up with family and friends or using it as a convenient stop before heading to the Continent. As mentioned earlier, those living in the Euro zone have a perception that the UK is an expensive place to holiday, combining it with a trip to visit friends or relatives provides them with a holiday without the expense of accommodation.

### 7.4 Purpose of Trip

**Figure 7.7: Main reason for trip by type of traveller**



**Base: All respondents – Stage 2 (Telephone interviews)**

Non UK visitors have 3 main reasons for coming to the UK – general sightseeing, visiting friends or relatives or business.

Many of the UK staying visitors in Kent are on their way to a shopping trip, most likely in Calais.

The three dominant reasons for crossing the Channel five years ago among visitors to Kent were holidays, business or visiting friends and family, which accounted for 75% of the trips. These reasons remain as the dominant ones five years on.

### 7.5 Frequency & duration of trips to the region in last 2 years

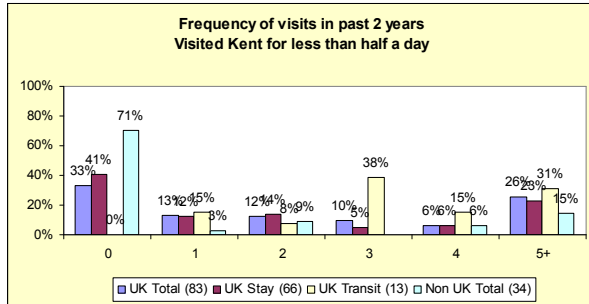
Respondents are most likely to have visited Kent in the past 2 years on a short break of 1-3 nights over longer stays or day trips.

Almost a quarter of the non UK respondents have visited Kent more than 5 times in the past 2 years. Although the sample is small for the people who have had five or more longer duration

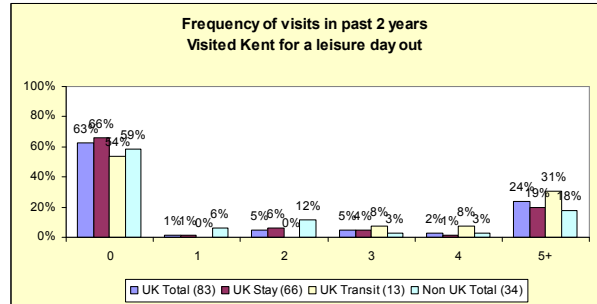
trips in the past two years there is an indication that the majority of them are visiting friends and family.

The following charts highlight the frequency of different types of trip to Kent in the past 2 years.

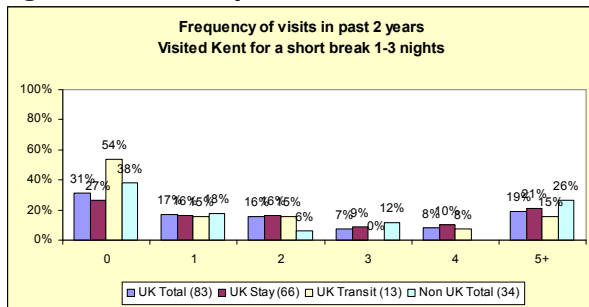
**Figure 7.8: No. of previous trips for < half a day**



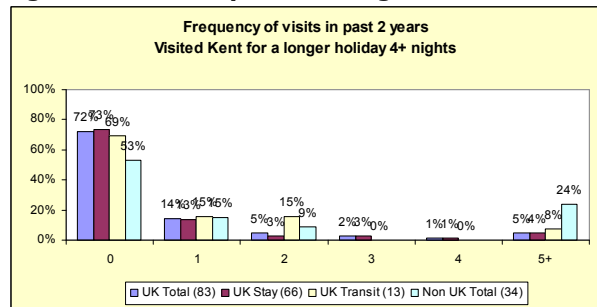
**Figure 7.9: No. of previous day trips**



**Figure 7.10: No. of previous short breaks**



**Figure 7.11: No. of previous long breaks**



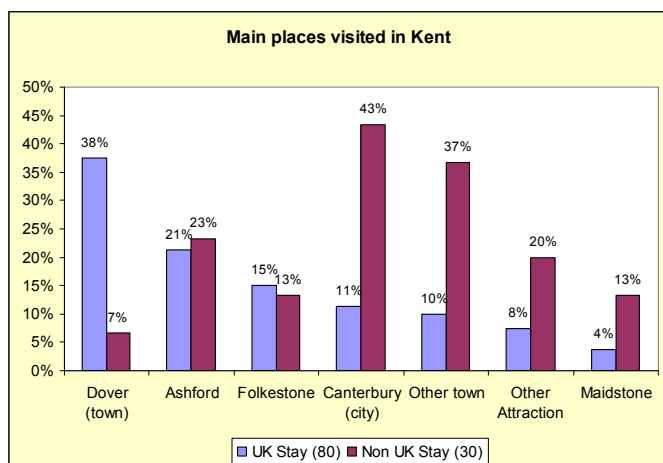
**Base: All stopping in Kent – Stage 2 (Telephone interviews)**

## 7.6 Places visited & Places spent most time at

Canterbury is the town that most non UK visitors will go to followed by Ashford.

The UK staying visitors are staying close to the ferry or train departure points.

**Figure 7.12: Main places visited in Kent**



**Base: All stopping in Kent – Stage 2 (Telephone interviews)**

The other towns mentioned were varied and included Herne Bay, Isle of Sheppey, Romney, Faversham, Bromley and Sittingbourne to name but a few.

Canterbury was the most visited place in Kent during the last survey, accounting for 56% of the visitors. Next followed the main access and departure points of Dover (19%), Folkestone (17%) and Ashford (14%).

### 7.7 Reasons for choosing & influencing factors

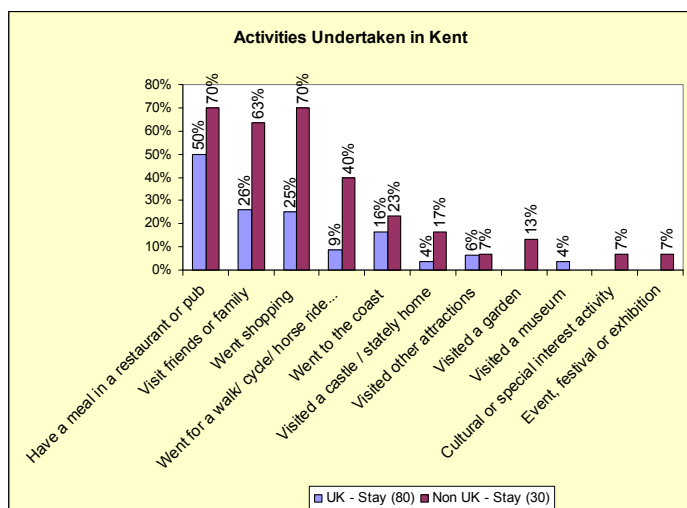
There is a broad range of factors that is attracting non UK visitors to the towns that they have visited. These are mainly driven by the historical aspects, the shopping and the physical attractiveness of the places.

UK visitors are staying where they do because it is convenient for the crossing or because they have friends or family living nearby.

### 7.8 Activities undertaken

Non UK staying visitors are most likely to have a meal and go shopping while they are staying in Kent. 63% are visiting friends or family and are likely to go for a walk. Only a small proportion visit stately homes, castles or gardens. From the focus group of French visitors to Kent, most of them came for a relaxing peaceful holiday, which is likely to be fairly inactive.

**Figure 7.13: Activities undertaken in Kent**



**Base: All stopping in Kent – Stage 2 (Telephone interviews)**

The UK staying visitors are most likely to have a meal in the area but are unlikely to visit any attractions, probably because they are en route to the continent and are just staying the night or visiting friends or relatives before their crossing.

The respondents five years ago appear to be more active than they are now. Having a meal and shopping were at the top of the activity list in the last survey. 59% of overnight visitors to Kent five years ago went for a walk or a cycle ride in the country and 45% visited an attraction or museum in the region.

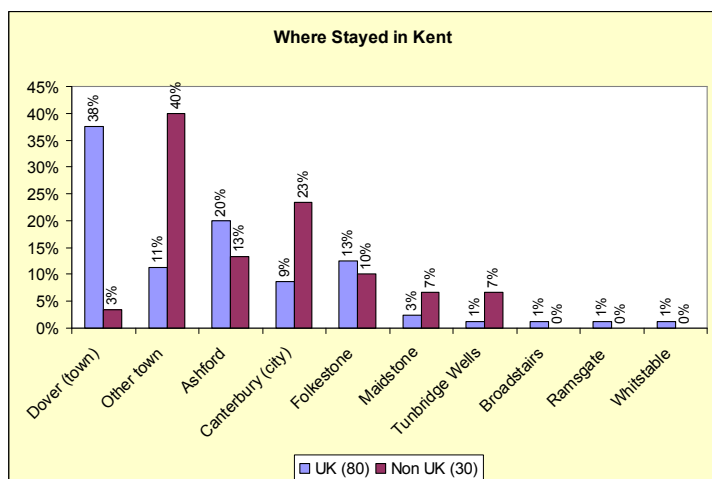
Given that many of the non-UK visitors are repeat visitors then maybe they have done the main attractions and are just spending time with their family or friends.

### 7.9 Where stayed

Non UK visitors are staying in a variety of places, most often dictated by where they have friends or relatives. As sample sizes are small for this group it is not reliable to make a judgement on which destinations are the most popular.

UK visitors, who are staying in Kent mainly for the purposes of catching a train or a ferry are staying close to the terminals in Dover, Ashford or Folkestone.

**Figure 7.14: Places where most overnight stays occur**



**Base: All staying in Kent – Stage 2 (Telephone interviews)**

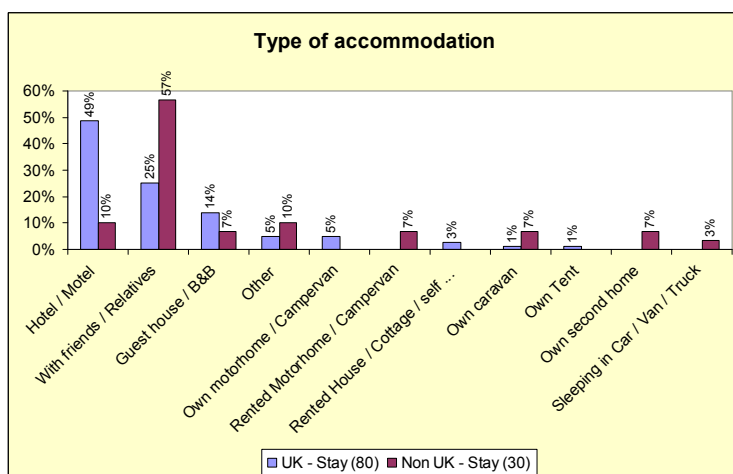
As with the earlier section on towns visited, the 'other' towns are too varied to draw any conclusions. They include Barham, Deal, Faversham, Dartford, Camber Sands, Headcorn and Hythe.

### 7.10 Type of accommodation

Non UK residents are choosing to stay with friends or relatives in Kent above any other type of accommodation. This is likely to be a combination of a couple of factors; one is to visit their friends in another country and experience that culture, the other is it is a cheap form of travel as the accommodation expense has been removed. A key criticism from the French focus group respondents was that the UK is expensive for accommodation and the quality is not always that good. This is not a factor that is unique to Kent, they have that perception about the UK in general.

UK visitors are choosing hotels ahead of staying with family or friends. As was seen in the previous section the UK respondents are staying close to the departure points so are likely to be choosing hotels that are convenient for their onward journey.

**Figure 7.15: Main types of accommodation used in Kent**



**Base: All staying in Kent – Stage 2 (Telephone interviews)**

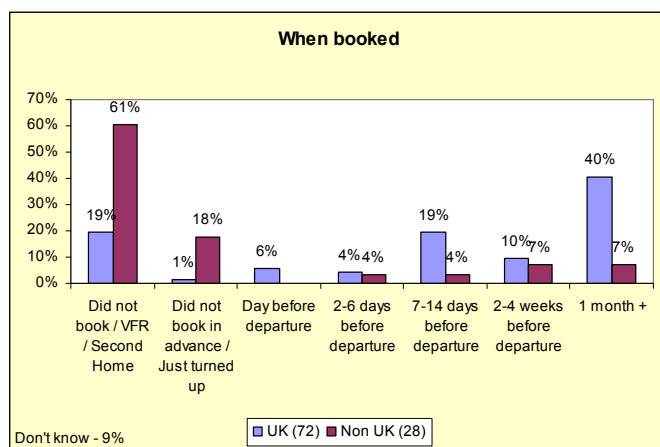
Compared to the last study, staying with friends or relatives is still the most popular accommodation choice but hotel accommodation has increased by 11 points to 26% of staying guests.

### 7.11 When booked

As most of the non UK visitors are staying with friends or relatives in Kent they are not booking their accommodation.

40% of UK staying visitors are booking their accommodation more than 1 month in advance and 39% are booking within 1 month. The remainder are staying with friends or relatives.

**Figure 7.16: When was the accommodation booked?**



**Base: All staying in Kent – Stage 2 (Telephone interviews)**

The Functional and Habitual segments are the ones most likely to book more than one month in advance. These are the people most likely to book their crossing well in advance in order to obtain the cheapest fares and appear to book their accommodation soon after.

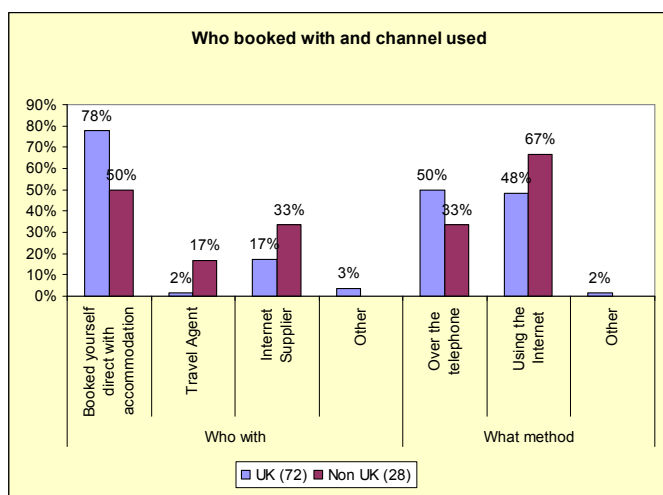
### 7.12 Who booked with & channel used

The majority of UK visitors are booking their accommodation direct with the accommodation provider but there is an even split of those using the internet and those booking by phone. This may be partly due to the type of accommodation as some smaller independent hotels or guest houses may not have an online booking facility.

Functionals are showing a tendency to book their accommodation direct with the accommodation provider over the phone. Although many of them will use the internet for searching for travel and accommodation in general, for their cross Channel trips they are preferring the phone. It may be down to specific requests they have or the type of accommodation they are choosing not having an online booking facility.

The more modern segments, mainly the Cosmopolitans, are booking online.

**Figure 7.17: Who accommodation was booked through and channel used**



**Base: All staying in Kent – Stage 2 (Telephone interviews)**

### 7.13 Duration

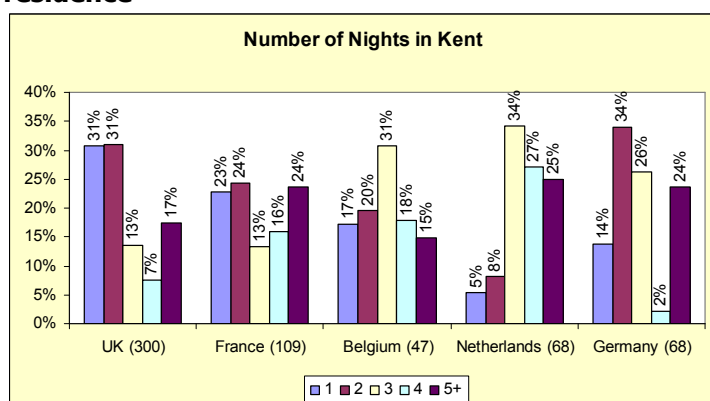
The average number of nights spent by staying visitors in Kent is 3.7. This varies less over the seasons than in Nord-Pas de Calais.

**Table 7.1: Average no. of nights in Kent**  
Mean number of nights in Kent

Jun-Aug (Qtr 1)	Sep-Nov (Qtr 2)	Dec-Feb (Qtr 3)	Mar-May (Qtr 4)
4.0	3.7	3.2	3.4

**Base: All staying in Kent – Stage 1**

**Figure 7.18: Number of nights spent in Kent by residence**



**Base: All staying in Kent – Stage 1**

Most of the non UK residents are visiting friends and family in Kent and the UK staying visitors are either staying with friends or family or in commercial accommodation before crossing the Channel. The result of this is that it is most common for a UK resident to stay in Kent for 1 or 2 nights and for continental Europeans to stay longer.

### 7.14 Usage of the Internet

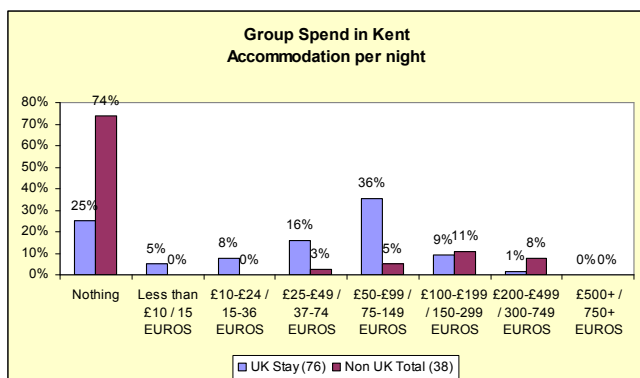
The six UK focus groups talked about short breaks and the channels they use to search and book their trips. The internet came out as the most popular channel for booking. The same reasons emerged as the French groups; convenience, speed, ability to compare and price. As the survey results have shown, there is still a large proportion using the telephone to make their booking, so the focus group respondents were biased towards internet use.

Many of the same reasons apply here as in the previous section on Nord-Pas de Calais. The internet is used for many things in everyday life from looking for general information, e-mailing, banking, insurance, purchasing items or phoning people. As the internet becomes more widespread through all sections of the population it becomes second nature to search it, especially for travel needs.

Travel is one of the markets that the internet is most widely used for. It allows people to compare prices from different providers and generally give more information and images than standard printed brochures. Sites that post independent consumer opinions about accommodation or places are also rising in popularity and these are generally trusted more than what appears in holiday providers brochures even though what might appeal to one person may not have the appeal to someone else.

### 7.15 Spend

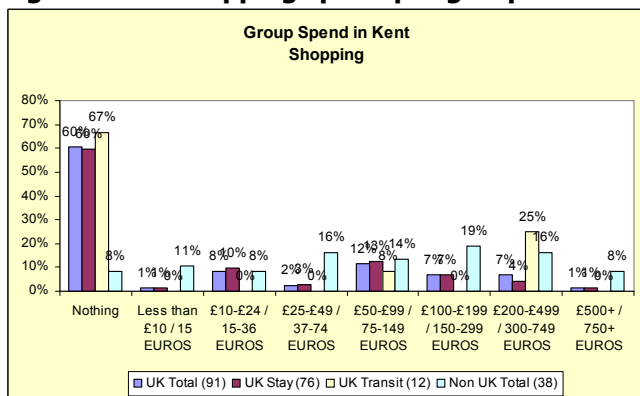
**Figure 7.19: Accommodation spend per night**



**Base: All staying in Kent – Stage 2 (Telephone interviews)**

Most non UK visitors stay with family or friends. As a result of this most are not spending any money on accommodation. For the UK visitors staying in Kent a quarter are not spending any money on accommodation as they are staying with friends or relatives and half are spending between £25-£99.

**Figure 7.20: Shopping spend per group**

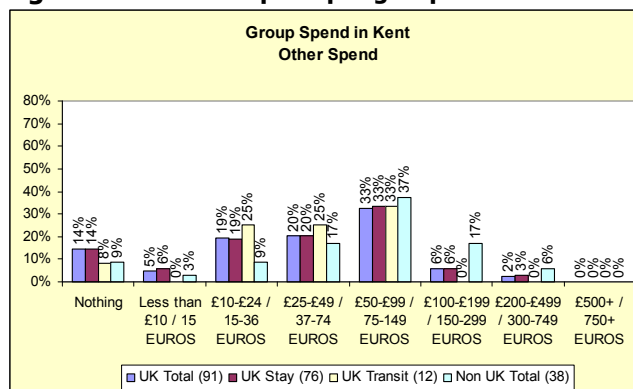


**Base: All staying in Kent – Stage 2 (Telephone interviews)**

Non UK staying visitors naturally spend more on shopping as they are in the region for longer than other types of visitor, and they have saved money on their accommodation by staying with family or friends. 43% are spending more than £100/€150 during their stay on shopping.

In terms of other spend, which covers items such as meals, petrol and attractions, the non UK staying visitors are spending slightly more than other types of traveller due to the fact that they are specifically visiting the region rather than just staying there to catch a train or a ferry the next day and are staying longer than the UK staying visitor. But saying that, UK staying and transit visitors are spending decent amounts of money in the short time that they are in the region. Most of the spend is likely to be on meals.

**Figure 7.21: Other spend per group**



**Base: All staying in Kent – Stage 2 (Telephone interviews)**

As the spend was collected using scales, approximate estimates have been made using the mid points of each scale and dividing it by the number of the people in the group to give an average spend per head. As can be seen from the following table, the spend is low for most categories, especially the spend per head on accommodation per night due to the high proportion staying with friends and family.

**Table 7.2: Average spend per head in Kent**

		Kent					
		Accommodation		Shopping		Other	
		£	€	£	€	£	€
Kent	Up to 1 day			£37.98	€ 53.18	£22.45	€ 31.43
	Stay	£19.79	€ 27.71	£32.16	€ 45.02	£26.77	€ 37.48
	Transit (< 2 hrs)			£44.86	€ 62.80	£25.56	€ 35.78

**Base: All spending in Kent – Stage 2 (Telephone interviews)**

## Reactions of Visitors

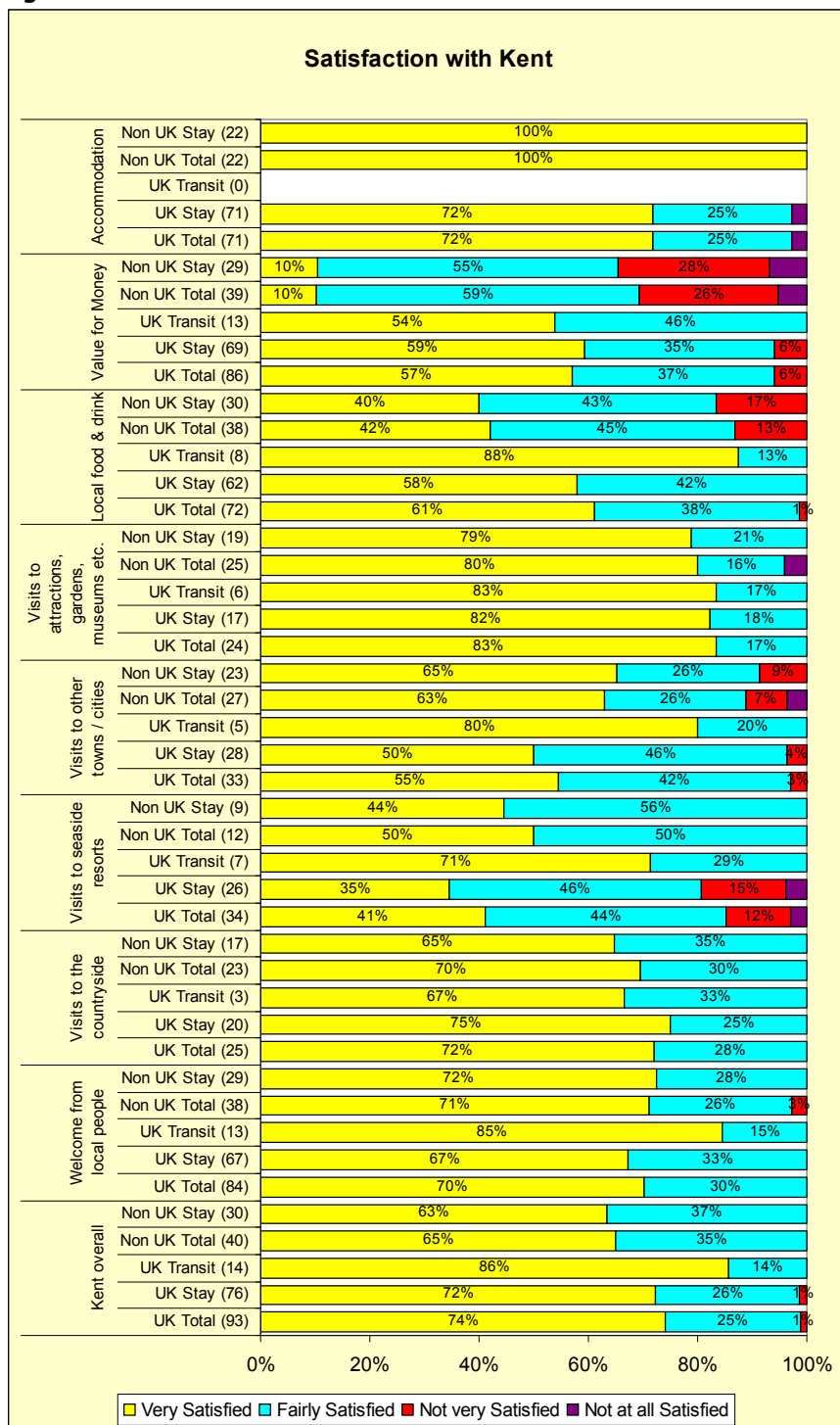
### 7.16 Visitors Satisfaction

Generally, satisfaction levels are high among visitors to Kent. There are a couple of areas where satisfaction levels are lower for certain groups of visitors.

The non UK visitors are most critical about the value for money and the quality of the food in Kent. A common perception from the focus groups is that the UK is expensive and the food is poor. It seems that for a for about a third of non UK visitors the perception of value for money is valid and 17% of staying visitors also found the criticism of the food valid.

UK visitors to Kent were least satisfied with visits to the seaside resorts. As most were visiting Dover or Folkestone then the criticism is likely to be geared towards either of these 2 towns. Although Dover is classified as a coastal town it is unlikely that respondents will make that distinction. During a focus group Dover was mentioned as not being particularly attractive.

**Figure 7.22: Visitor satisfaction scores for Kent**



**Base: All stopping in Kent – Stage 2 (Telephone interviews)**

### 7.17 Areas for improvement

There were few comments relating to how a stay in Kent could be improved. A few of the non UK responses related to cheaper prices or accepting the Euro in Kent. The UK staying visitors made a few comments about less traffic and better weather.

During the last survey the main criticism was the weather. Traffic and signposting was also an issue for a small proportion. The prices in general and the price of accommodation also came up in the list of areas for improvement five years ago. It would appear that signposting is not an issue now as there were no comments relating to this area in the latest survey.

## 7.18 Items that attract or prevent people from stopping in the region

The history and heritage and the countryside and villages are the two most dominant factors attracting people to Kent. All groups, including those who transit through the region, think that these factors are the most attractive.

Non UK staying visitors find more of the factors appealing than other groups. Items of interest for this group include walking, the pubs, arts & culture, gardens and seaside resorts.

During the last survey it was the same elements that were deemed attractive for Kent. The countryside and the history and heritage were seen as the two main factors. As with the latest survey, the non-UK respondents were attracted by a broader range of elements including the pubs, the gardens, the seaside resorts and cultural events.

During one of the focus groups held in France it was clear that the individual elements on their own were not enough to attract visitors, it was the combination and packaging of them that was appealing.

On the following chart it would appear that staying guests are attracted by walking in the region, but during the focus group many potential visitors stated that they would not come specifically for a walking/ hiking trip because of the uncertainty over the weather. People were interested in walks where there is some history and heritage in some attractive settings so walking routes would have to incorporate sights to see or attractive country pubs to visit to make them appealing.

Cultural events or attractions would also be important, especially as there are a significant proportion of repeat visitors. It is likely that the main attractions would have been visited on previous occasions so attractions or events that offer an experience of Kent or English culture would be appealing to non-UK visitors.

To summarise the appealing elements of Kent:

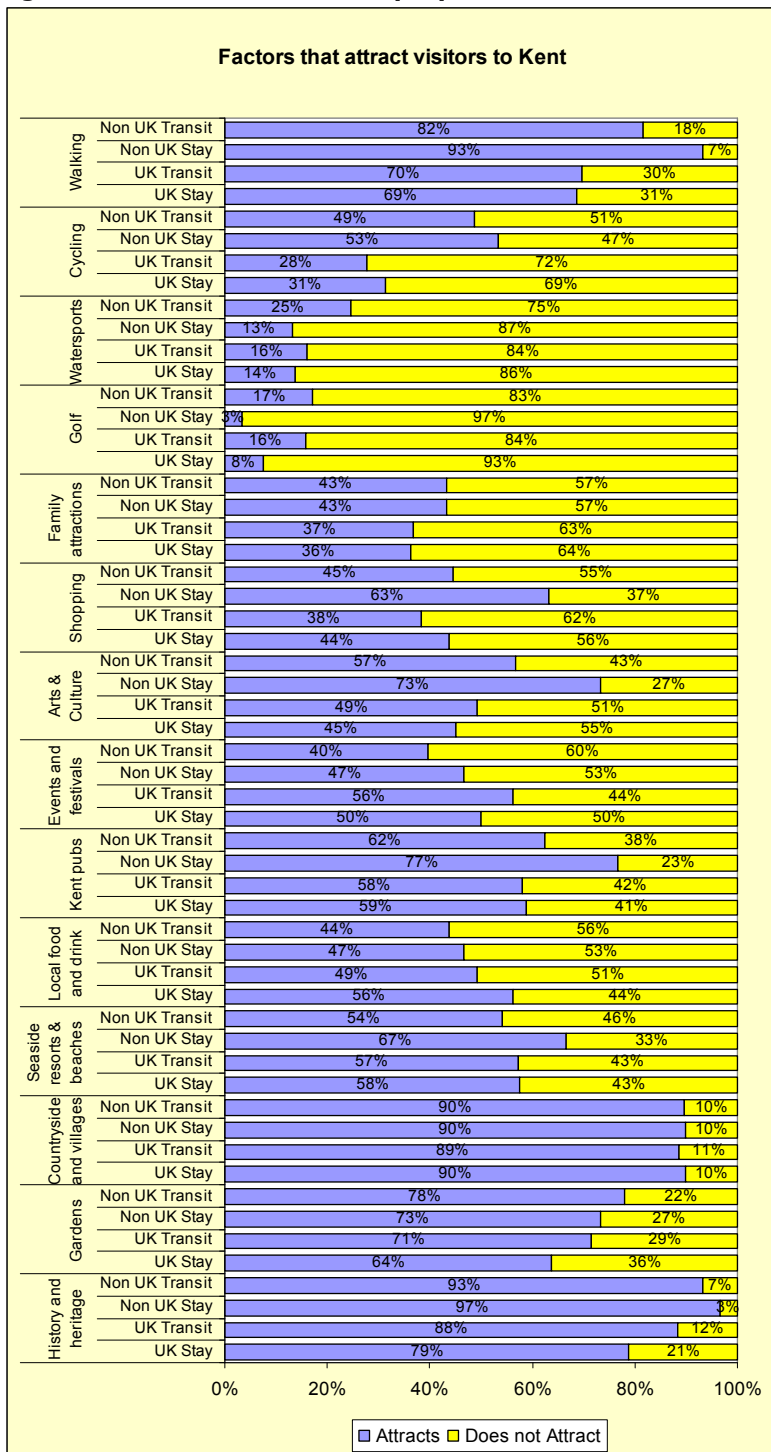
All nationalities find the following elements appealing:

- History & Heritage
- Countryside
- Villages

In addition to the elements listed above, non-UK visitors find the following elements appealing, but not individually; it is in combination with the factors listed above or other factors below:

- Walking
- Pubs
- Arts & Culture
- Gardens
- Seaside resorts

**Figure 7.23: Factors that attract people to Kent**



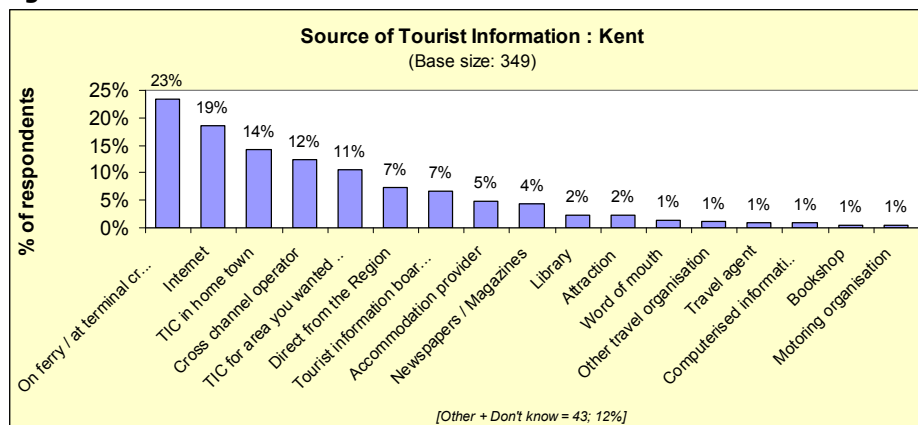
**Base: All respondents – Stage 2 (Telephone interviews)**

## Response to Marketing

### 7.19 Tourist Information

Just under half (42%) of respondents who stopped in Kent for more than half a day collected tourist information about the region. 44% of the French visitors to the region collected some tourist information.

**Figure 7.24: Where tourist information is obtained**



**Base: All picking up tourist information – Stage 2 (Telephone interviews)**

Almost a quarter of people who picked up some tourist information collected it on the ferry or at the terminal before the crossing.

Visitors to Kent seem to be more proactive than visitors to Nord-Pas de Calais when it comes to looking for information a higher proportion are looking online or at the tourist information centre in their own country for information about the region.

The main things that the information is used for is ideas on places to visit and ideas on places to eat. 97% of respondents were happy with the information collected about Kent.

## 7.20 Marketing literature

In the two French focus groups and one of the UK groups opinions were sought on the Kent Visitor Guide for 2006. These opinions are based on a maximum of 24 individuals so should be used as a guide rather than robust findings.

Some of the respondents did not have any knowledge of Kent so they went straight to the map to find out where it was and were surprised at how close it is to London.

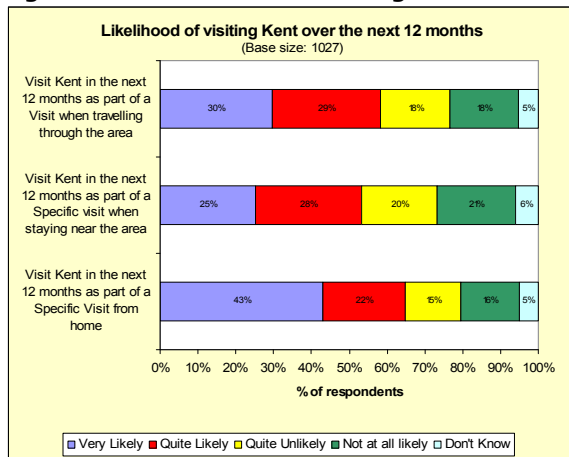
The guide was liked as it looked good, was well explained, has lots of detail and has something for everyone.

There were a few negative comments that related to suspicion about all the photographs being taken in beautiful sunshine, no prices for hotels and the map could do with showing public transport links so potential visitors can see how easy it would be to get around.

## 7.21 Likelihood of future visits

There are a good proportion of people that state a future intention to visit Kent. In general, people would consider visiting Kent for shorter durations.

**Figure 7.25: Likelihood of visiting Kent in the next year**

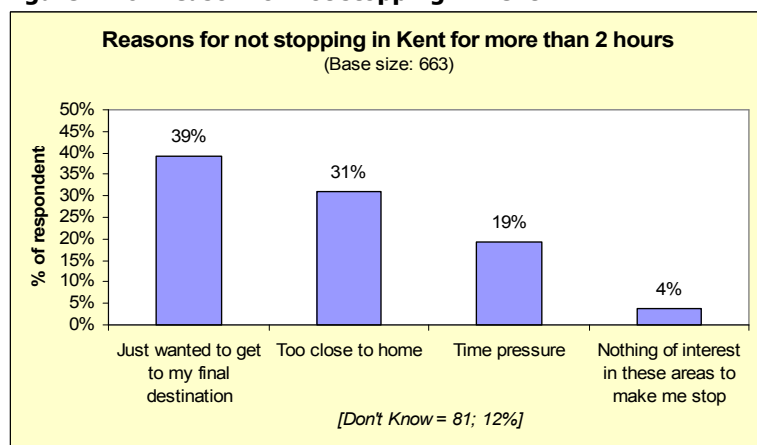


**Base: All respondents – Stage 2 (Telephone interviews)**

Those who did not stop in Kent on this trip were asked if they would stop in future and what would encourage them to stop. There is a fairly even split of those who will definitely stop, those who will not and those who are undecided. Those who would stop are most likely to stop for a day trip or for a short break of 1-3 nights.

The main reasons given for not stopping were a desire to get to the final destination, that it is too close to their home to warrant a stop or because of time pressures.

**Figure 7.26: Reason for not stopping in Kent**



**Base: All not stopping in Kent – Stage 2 (Telephone interviews)**

When asked what would encourage a stop in the region the vast majority stated that nothing would make them stop. As there is a proportion of the market who do not know anything about the region, the second most common answer was 'don't know'.

During the French focus groups among people who currently transit the region, they indicated that Kent would have to show what it offers but not as simply as history & heritage, countryside and coast as these are all available in France and it doesn't cost them as much to

see it. They need to know how it is different from what they have in their own country and it needs to be packaged in a way that links the countryside with nice pubs and history and heritage. As stand alone elements they are not enough to attract new visitors, but packaged someone could be persuaded to come.

## 8 Strategic Recommendations

### 8.1 Introduction

This chapter seeks to draw out **priority issues** with some related marketing recommendations for increasing Cross Channel business in Kent and Nord Pas de Calais (NPdC). These are broad recommendations for Partners to consider in developing their campaigns; they do not purport to represent a full marketing strategy.

The brief posed a number of questions for the research. The first three have been answered in the research findings above:

- What is the perception of crossing the channel and travelling through the ports/tunnel?
- What are the visitors' perceptions of Kent and NPdC?
- Where do people get their information?

The remaining questions are considered below:

- How can Cross Channel business be increased – whether this is by encouraging more repeat business or attracting new customers, or a combination of both?
- How can visitors be persuaded to stop and/or stay in Kent or NPdC?
- How can the length of stay be increased - whether day trip or staying visitor?
- What can the partners do to encourage people to stay in Kent and NPdC?
- What are the barriers to people staying?
- What are the most effective ways of communicating with passengers before or during travel?
- Are the partners' marketing activities effective?
- What marketing material is required to increase the business?
- What is the best way to develop Cross Channel business for a sustainable and profitable future?

This chapter seeks to answer these questions with a more integrated response under the following headings:

- Strategic changes since 2000

- The scale and value of the market to the two destinations
- Encouraging current passengers to stop
- Encouraging repeat business
- Attracting new visitors
- Promotional print and other media
- Working with the operators
- KTA/NPdc collaboration
- Summary

## 8.2 Strategic changes since 2000

The most important strategic change in marketing terms is the positive opportunity afforded by the phenomenal **growth in internet usage**. In response to this, all the ferry operators have now developed sophisticated websites to promote travel and handle passenger bookings. Only a small proportion of ferry bookings are now made through travel agents (12%, Figure 4.9), with consumers either booking direct by telephone or online. Crucially, 51% of all bookings were made on the internet (Figure 4.10). Bookings made direct with the cross channel operators via the internet account for 34% of all bookings (Figure 4.9). This increasing proportion of online bookings is set to continue. (Mintel 2005)

Similarly, over two thirds of accommodation bookings are made direct with the operator and over half are made on the internet (Figures 7.21, 7.22 and 8.17).

The focus groups highlighted the increasing importance of the internet for travel research and booking.

Since the last survey in 2000<sup>1</sup>, there has been a **decline in passenger numbers** along with the proportion and number of people stopping in both regions. This has been driven in parts by the decline in UK day trips, the erosion of price differentials, the impact of terrorism and epidemics (Foot & Mouth Disease, SARS), the growth of the low cost carrier network and, probably most important, the £/€ exchange rate change that has impacted on the main UK outbound market to Europe. This decline is projected to continue<sup>2</sup>. This suggests the market may become more focused on those who find the Channel crossings most convenient i.e. those close to the ports and the small niches who appreciate the nature of the crossing<sup>3</sup>.

However, **the attitudes (and profiles) of cross-channel visitors have not altered significantly** since the 2000 survey e.g.:

- The lack of awareness of both regions by those passing through
- The negative perceptions of both regions
- The difficulty of encouraging people to stop once they have crossed the channel
- The perceived high cost of visiting Kent

Many of the issues, and related recommendations, from the 2000 study appear still relevant.

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<sup>1</sup> Cross Channel Tourism Study, November 2000

<sup>2</sup> Crossing the Channel, Mintel, August 2005

<sup>3</sup> The choice to cross by ferry or train is a functional one based on distance, type of vehicle, group size and cost. For example, if you have a campervan or a caravan then the only way to get it to the continent is to go on the ferry or the train.

These unchanged attitudes are perhaps not surprising; relatively little has changed in product terms over the last five years but it does suggest that marketing initiatives might need to be re-directed or reinforced - if not re-assessed - in the light of the latest findings. We expand on the scale and profile of the market in Para 1.3 below.

## 8.3 The scale and value of the market to the two destinations

### 8.3.1 Scale of the market segments

The declining cross channel market over the previous five years is a matter of concern and may impact on the priority afforded by the Partners to these markets.

The overall market (2004 figures, excluding Eurostar passengers travelling via Lille or Ashford) was made up of almost exactly **11m trips**.

There is a massive disparity in the origin of flows with:

- 80% (8.8m) of trips originating in the UK.
- 20% (2.2m) of trips originating in Europe, made up principally of:
  - 6% from France (660,000 trips)
  - 3% from Belgium (330,000 trips)
  - 2% from the Netherlands (220,000 trips)

However, it is more important to look at this overall market in terms of transit, day and staying visitors in the destination regions.

Of the 11m trips passing through NPdC:

- **7.1m (65%) travel through NPdC without stopping** and 5% (0.5m) stop for less than 2 hours; this represents 59% of the UK originating market and 88% of the European originating market
- **2.4m (22%) stop for a day visit** (26% of the UK market and 6% of the French market)
- **Only 940,000 (9%) of the total market stays more than one day** (10% of the British market and 5% of the French market)

Of the 11m trips passing through Kent:

- **8.6m (79%) travel through Kent without stopping** and 6% (0.7m) stop for less than 2 hours; this represents 89% of the UK originating market and 67% of the European originating market
- **880,000 (8%) stop for a day visit** (6% of the UK market and 15% of the European market)
- **Only 767,000 (7%) of the total market stays more than one day** (4% of the British market and 18% of the European market)

These figures include business visitors. If they are excluded, the discretionary visitor market is reduced significantly as shown in Table 9.1.

**Table 8.1: The scale of the market by type of visitor (000s)**

NPdC	Total Trips	UK origin	Europe origin	Total Leisure trips	UK origin Leisure	Europe origin Leisure
Not stopping	7,109	5,181	1,928	5,806	3,762	2,044
Transit visitors	521	476	45	393	352	41
Day visitors	2,423	2,299	124	1,987	1,771	126
Staying visitors	940	838	102	741	627	114

<b>Kent</b>						
Not stopping	8,641	7,297	1,344	6,733	5,389	1,344
Transit visitors	705	566	139	568	418	150
Day visitors	880	561	319	795	428	367
Staying visitors	767	370	397	742	278	464

### 8.3.2 Market segment profiles

There are two dominant Arkleisure segments among leisure passengers crossing the Channel – **Functionals (29%) and Cosmopolitans (21%)**. These two segments account for 50% of the passengers (Figure 4.5). The cross channel market also attracts Habituals who are less inclined to try new things.

**The two main groups are independent, self-reliant and confident.** Functionals will prefer tradition whereas Cosmopolitans may look for more individuality and may be a little more adventurous. Both are interested in new experiences. Both want good service. Both have an appreciation of art and culture. The significant difference is that the cosmopolitans are more prepared to spend and are more likely to try something new or fashionable. Of particular note, 89% of Functionals have internet access at home and 66% spend over 7 hours/week on the internet. They are the second highest internet user segment.

The distinguishing feature emerging from the survey is the inordinate proportion of **Functionals who tend to be more price-conscious**. This is not explained solely by the 'booze-cruisers' to NPdC as the segmentation does not vary greatly between transit, day or staying visitors.

The British and the French have an **older age profile** than the other nationalities crossing the Channel. The French, Dutch and Germans are more likely to be visiting friends or relatives and are likely to be travelling as family groups (Table 4.1) while NPdC is attracting less children than five years ago.

The **day visit market** is made up of Functional couples, Functional groups of adults, Cosmopolitan couples and Habitual couples which is not a typical shopper profile, a large proportion of which would be made up of High Streets and Style Hounds, who are into new trends and fashion labels. The Functional and Habitual shoppers are likely to be driven by the savings that can be made on groceries and household items.

In terms of **people staying in NPdC**, it is dominated by couples, who are almost twice as common as other group compositions. This group is more mature than the national profiles and is getting older, as is the population in general (Figure 4.1). Again it is Habitual, Functional and Cosmopolitan couples that dominate. Family groups do stay, but mainly in the summer holiday period, when their volume is twice as much as at other times throughout the year and it is Functional families that are the dominant family group.

For **people not stopping at all** in NPdC, the common dominant theme is that they are on a longer holiday, dominated by couples and families, mainly in the Functional and Cosmopolitan segment.

### 8.3.3 Value of the leisure market segments

For staying visitors in NPdC, the average number of nights is 3.4. For staying visitors in Kent, the average number of nights is 3.7 (Tables 7.1 and 8.1). The length of stay in both regions has increased marginally since 2000. This means that there are:

- 2.7m nights spent in Kent by those crossing the channel
- 3.2m nights spent in NPdC by those crossing the channel

Based on the estimated expenditure figures (Figures 7.2 and 8.2), which must be treated with some caution<sup>4</sup>,

In NPdC:

- Transit visitors spend £8m/€11m when crossing the channel
- Day visitors spend £275m/€383m when crossing the channel
- Staying visitors spend £224m/€312m when crossing the channel

In Kent:

- Transit visitors spend £0.8m/€1.1m when crossing the channel
- Day visitors spend £48m/€68m when crossing the channel
- Staying visitors spend £132m/€187m when crossing the channel

Table 9.2 summarises the value of the cross channel leisure market for each region.

**Table 8.2: The value of the leisure market by type of visitor**

NPdC	Leisure Trips (000s)	UK origin	Europe origin	Visitor days	Spend/head/day	Total Expenditure £/€
Not stopping	5,806	3,762	2,044	-	-	-
Transit visitors	393	352	41	393	£20/€28	£8 m/€11m
Day visitors	1,897	1,771	126	1,897	£145/€202	£275m/€383m
Staying visitors	741	627	114	2,519	£89/€124	£224m/€312m
<b>Kent</b>						
Not stopping	6,733	5389	1,344	-	-	-
Transit visitors	568	418	150	568	£1.40/€2	£0.8m/€1.1m
Day visitors	795	428	367	795	£60/€85	£48m/€68m
Staying visitors	742	278	464	2,745	£48/€68	£132m/€187m

#### In summary:

- A large majority of visitors do not stop and many of these are not open to persuasion
- The day visitor market to NPdC is large and very high value, particularly in comparison with Kent
- The overall staying leisure market in NPdC and Kent is similar in volume but value in NPdC is much greater owing to the higher spend per head.

The key markets need to be prioritised against other markets within the two destinations. Key questions for the respective marketing agencies are:

- Given the scale of the passing through market, is it worth trying to persuade those who do not stop at present to do so?
- Should the focus be on those who do currently stop to do so more often, and for longer?
- How can new markets be attracted?

## 8.4 Encouraging current passengers to stop

<sup>4</sup> Expenditure figures were obtained from questions that used a banded scale (e.g. £50-£100/ €75-€150) with the midpoint being used for an average spend calculation.

The results of this survey show that the vast majority of cross channel passengers do not stop in either Kent or NPdC. Only 35% spend any time in NPdC and even less (21%) stop in Kent.

In NPdC, of those who did not stop for more than two hours, 72% of those passing through did not stop because they just wanted to get to their final destination and/or did not have time (Fig 7.31). 8% found NPdC an inconvenient place to stop in relation to their overall journey and 8% said there was nothing of interest in the area. Although 53% of passengers considered that 'nothing' would encourage them to stop, 16% suggested that better information/promotion would encourage them to do so while 6% referred to product issues. Given that 23% 'did not know', these figures should be taken as guides only.

In Kent the situation is more difficult (Figure 8.26). Of those who did not stop, 58% stated time desire to get on/time pressures but significantly more people said it was because it was too close to home (31%). Here 68% said that nothing would encourage them to stop, while around 8% referred to promotion and 4% referred to product improvements. 17% did not know.

The focus groups reinforced this practical issue that stopping was largely to do with time, wanting to get to the destination and that for many, the regions were too close to home.

The implication is that **although it will be impossible to persuade many of these customers to stop at all, there is some limited potential to encourage those passing through to stop**. These are likely to be people who have visited before and the vast majority (95%) stated that it would most likely be for a day trip. Taking into account the 'don't knows', we suggest that **around 20% of the passing through market might be persuaded to stop in NPdC and perhaps 10% in Kent** for more than two hours. Although it may be possible to convert transit visitors to day visitors, the difference in spend per head is not as great as might be imagined. (Table 8.1)

The over-riding constraint on capitalising on this market and encouraging more of the passengers to stop and stay in either region is the **low awareness** of what is on offer in both Kent and NPdC<sup>5</sup>.

- Over one third of passengers could not name anywhere within NPdC as a destination<sup>6</sup>. Only Calais and Boulogne were recalled by more than 30% of passengers (Figure 7.1)<sup>7</sup>. This situation has worsened since 2000.
- Any reference to Calais, as a town or region, was perceived as negative. The industrial image was amongst the worst things about NPdC. Although nowhere in Kent had such a poor image, only 3% of non UK visitors stayed in Dover while 20% stay in Calais (Figures 7.15 and 8.14)<sup>8</sup>
- Despite the low awareness of individual towns, there is some evidence to suggest that people know of places such as Lille and Le Touquet but are unaware that they are in NPdC

<sup>5</sup> Emphasised in 2000 survey recommendations

<sup>6</sup> Despite the low awareness of individual towns there is some evidence to suggest that people know of places such as Lille and Le Touquet but are unaware that they are in NPdC

<sup>7</sup> This low awareness is emphasised by the finding that most visitors had only visited the 'port' towns of Calais, Boulogne (and Cite d'Europe) (Figure 7.12)

<sup>8</sup> Dover was referred to in negative terms in the focus group

- With the exception of Canterbury, awareness of places within Kent is also generally low. Even those whose final destination was Kent found it difficult to name somewhere other than Canterbury (Figure 8.1)<sup>9</sup>
- Local 'brand' awareness was better in Kent than in NPdC e.g. the Garden of England and White Cliffs had awareness factors over 76% while the Fortified Towns and Cote d'Opale were generally lower. Awareness was much stronger amongst the domestic markets e.g. Cote d'Opale was recognised by 82% of French respondents. (Figures 7.4 and 8.4)

Increased awareness of what is on offer is not likely to sway those passing through easily so attempts to increase business need to be carefully focussed on the particular situation and needs. In any communication, there is therefore a need to **focus on the relevant positive attributes**.

Relaxation/general interest and sightseeing are the main reasons for visits to NPdC and Kent (Figures 7.7 and 8.7) - but this is on offer in many destinations. The main attributes are:

- In NPdC: the coast, local food and drink, the countryside, heritage, shopping and cultural events (Figures 7.2 and 7.27). Visitors go shopping and have a meal; relatively few visit attractions (Figure 7.14). They are very happy with the value for money (Figure 7.26). There is evidence of growing interest in trips specifically for eating out, events and shopping on land other than for alcohol/tobacco at the expense of general relaxation (Table 5.1)
- In Kent: the different (pub) culture, the history/heritage, countryside/villages and museums (Figures 8.2 and 8.23). Non UK visitors are most likely to go for a meal, shopping and a walk. They also find the gardens and resorts attractive. Only a small proportion visit heritage attractions; these are passive holiday-takers. UK visitors are similarly inactive. (Figure 8.13) There is evidence of growing interest in events, shopping, VFR and relaxation. (Table 5.1)

**Major new developments** may encourage potential visitors to stop but these will have to be of real significance. For example, Dover has recently commissioned a visioning exercise that identified opportunities for a waterfront speciality shopping centre, a new 4\* hotel, a new caravan site, town centre revitalisation, restoring local heritage features, a major public art work in the harbour, further development of Dover Castle, investment in the marina and outdoor activities and a new calendar of events. A high profile, high quality resort development could become an attraction in its own right.

**More and better information needs to be communicated direct to this existing market in order to raise awareness and thereby encourage passengers to stop.**

It is possible to communicate with this group at specific stages/points in their holiday decision-making cycle but the sooner in the process the better. **Given the new and growing use of the internet for booking passages by ferry and tunnel, there is a major opportunity to communicate directly with the individuals concerned with specially tailored emails.**

Currently there is little communication with ferry/tunnel customers before or after they book to make them aware of tourism-related opportunities in the two regions. The ideal situation would be for all the operators to feature links to the two destination web-sites on their own

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<sup>9</sup> This low awareness is emphasised by the finding that most UK visitors had only visited the 'port' towns of Dover, Ashford and Folkestone. Non UK visitors have visited more widely, probably related to visiting friends and relatives in the area (Figure 8.12)

home pages to encourage browsing before booking. The home pages of cross channel operators have a number of advertising spaces, special offers and short break promotions, however none of these highlight the opportunities in Kent or NPdC. Prominent links to the regions' tourism websites from these sites (as is currently the case with Disneyland Paris) would help to increase awareness.

Even better, operators could include a communication about the respective destinations within their confirmation emails sent to those who have booked a passage. Again, there are promotions for travel insurance etc embedded currently in confirmation emails. Ideally, the emails could include explicit calls to visit Kent or NPdC or, at least, offer a link to the respective websites. (Those booking by phone could be sent brochures by post.)

There are opportunities to **tailor messages to travellers based on their profiles**. For example, passengers who have booked early morning or late night crossings could be encouraged to consider the benefits of staying overnight in the port area as opposed to travelling early or late by being sent information on hotels. Information and added value offers on restaurants might also be sent; those travelling with children would get information on child-friendly facilities and attractions; those with dogs the best places to let them out; romantic settings (hotels, restaurants) for couples etc. The option for customers to book a hotel at the same time as they book their crossings could be incorporated into booking sites.

**Alternative (physical) points of contact** are at the port of departure and on board. Clearly, this is less satisfactory than at the time of booking as most – but not all - decisions will have been made but there is potential to affect return and future trips<sup>10</sup>.

At present, information including some promotional material - for shopping on-board etc - is handed out at check-in and in the queuing lines. The average waiting time at the port is one hour, most of which time passengers stay in their cars. Brochures or flyers could be distributed at this stage<sup>11</sup>. There are also opportunities to make use of the advertising screens at Dover.

The research showed that the most common place to pick up information on the destination was on the ferry or at the terminal<sup>12</sup>:

- **The terminal buildings** currently provide limited brochure displays<sup>13</sup> that appear ill-maintained with appropriate literature. Here there is an opportunity for more pro-active promotion, perhaps with **an arresting exhibition** including powerful images of the respective regions. NB: Cite d'Europe could be considered as a visitor centre playing a similar role.
- **On the ferries**, there are other opportunities either by way of brochure distribution, posters or the new illuminated screens available on some ferries.

Improvement of **signage in and around the ports** directing passengers to hotels, restaurants or specific attractions could also be an important factor in encouraging them to stop. Past experience suggests that ferry passengers respond well to such promotion. English Heritage ran a very successful campaign, publicising Dover Castle with large posters at the ferry port. This boosted their visitor figures with people returning early to Dover to visit the

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<sup>10</sup> Apart from caravaners and some 'free spirits', people don't tend to change their plans so the earlier they can be reached the better.

<sup>11</sup> Emphasised in 2000 survey recommendations

<sup>12</sup> This is a potential anomaly given the amount of information available at these points and the very low score for bookshops/guide books is surprising

<sup>13</sup> Terminal facilities are available at both ends of Eurotunnel and at Dover Port (the Travel Centre and the 'Food Village')

Castle before boarding their ferry. However, the costs of such advertising proved prohibitive in the longer term.

Another potential, but less targeted, opportunity to communicate with committed travellers is afforded by **local petrol stations** on the main routes leading to the ports. Standard modules could be created which could be adapted for local destinations.

## 8.5 Encouraging more repeat business and longer stays

### 8.5.1 Repeat business

Almost all the visitors to NPdC (92%) have visited the region previously in the past two years and 55% of the current visitors have visited on more than 5 occasions for day trips in the past two years (Figures 7.8 – 7.11). In Kent, the levels of repeat business are lower, largely because of the fewer day trips (86%). The greater frequency of short and longer stays is probably dictated by those visiting friends and relatives. (Figures 8.8-8.11)

The research shows that for those people who have visited the region before, there is a greater awareness of more destinations (Figures 7.12, 8.1), there are **high levels of satisfaction** (Figures 7.26 and 8.22) **and strong intentions to visit** in the future (Figures 7.29, 7.30 and 8.25)<sup>14</sup>. People who have visited the region before are therefore probably the most open to Kent and NPdC holiday propositions and additional visits.

**The most effective way of reaching this segment is through local operators,** particularly local accommodation providers<sup>15</sup> and transport operators but also local attractions (including hypermarkets) some of whom may have captured contact information. The destinations, who have their own mailing lists of previous enquirers and visitors, could work with local operators to:

- Encourage them to undertake direct promotions to past guests/passengers, or
- Develop a destination campaign, in co-operation with the operators, using all available (e)mailing lists. (The KTA DMS incorporates a booking engine for accommodation operators which could be useful to smaller providers.)
- A quarterly newsletter to keep past visitors up to date with new products or offers encouraging people to venture further into the regions and visit different places and attractions
- Continue capturing contact details for follow-up campaigns

Given the prevailing Arkleisure segments, such campaigns should **focus on incentives/promotions and new reasons to visit, particularly cultural events**. Special offers prompted 10% of all visits to NPdC (18% of day visits). Functionals, in particular, are likely to be open to special offers rather than advertising. Given the interest of both Functionals and Cosmopolitans in arts, culture and heritage, there should be scope to encourage return visits by highlighting these opportunities. Cosmopolitans rather than Functionals will be attracted by the **eating out opportunities**.

Given the high percentage of visitors who return to both regions, **provision of information to these visitors during their visit** – acting as a prompt for future visits - should be a focus,

<sup>14</sup> The British are most likely to consider visiting NPdC for a day visit rather than longer staying visits and the closer they live to the crossing point the more likely this is.

<sup>15</sup> Hotels are used by 61% of the market in NPdC, 49% of UK visitors in Kent and 10% of non UK visitors in Kent

with leaflets outlining the full diversity of what is on offer throughout the year distributed at TICs, attractions, hotels and restaurants.

In order to capitalise on this segment, there is also a need to **address the areas of least satisfaction and the perceived weaknesses** in the respective products (Figures 7.26, 8.22 and focus groups). Repeat business is also dependent on ensuring that high standards are maintained. In NPdC, the negative perceptions were based around the industrial image of Calais and various complaints by small numbers of people e.g. declining quality of food (!) and some dissatisfaction of resorts by UK visitors. In Kent, non UK visitors complain about the cost of visiting, value for money and the quality of food while UK residents complain of the congestion, the M25 and the coastal resorts.

There are a number of product improvements in train. In NPdC, there are plans to extend Nausicaa in Boulogne, Calais is planning a new museum/gallery, a golf course at Sangatte and a new environmental site at Site des Deux Caps. In Kent, there have been some important accommodation upgrades, Dickens World in Chatham is nearing completion and there are plans for the Turner Contemporary in Margate and cultural improvements in Folkestone but these initiatives need to be communicated. Significant improvements in the quality of accommodation and food will help change the perception of poor value for money.

### 8.5.2 Longer stays

Longer stays will be encouraged by better information on the diversity of what is on offer prior to the visit but - again - a targeted approach is necessary as mere awareness-raising will not be enough to persuade people to stay longer. Many of the above recommendations are also relevant here.

In Kent, the average length of stay is four nights. Europeans are more likely to spend longer in Kent than British people partly because of the high proportion of those staying with friends and relatives (45% of French visitors and 31% of British).

There is a clear opportunity to promote activities and attractions to the VFR market through local people so that they are fully aware of what the local options are and can promote them to their visitors. The more there is for people to do, or at least the more they are aware of things to do, the longer they will stay. **A specific campaign aimed at potential hosts of VFR trips should be worthwhile.**

For other visitors, promotion of good value hotels and restaurants and free attractions would alleviate fears of high costs. **Accommodation packages offering the third or fourth night free**, and including entrance to attractions (gardens etc) would serve the double purpose of enticing people to stay longer and inviting them to go to places they would otherwise not have thought about.

In NPdC, the average length of stay is three nights, brought down by the large number of day visitors. VFR is relatively low in Nord Pas de Calais. A distinctive feature is that people do not stray far into NPdC; Calais and Cité Europe were the most visited destinations. The main places to stay in NPdC are Calais and Lille. As before, more information is essential to extend interest in spending more time.

Day visitors do not necessarily want to spend additional money or time so attempts to encourage them to prolong their visit must take this into account. There is an opportunity, however, to capitalise on the fact that many return several times a year by, for example,

**offering a free night's accommodation in a hotel near Calais after three trips within a year.** They could then be targeted with information on restaurants and local attractions to use while they were there. Given the trend for repeat visitors, there is a good chance they would return and stay again.

**Campervans, motorhomes and motorcyclists** are important staying markets for Nord Pas de Calais, and improved facilities to cater for their specific needs (such as secure parking, high quality and accessible camp sites) will encourage them to stay longer, or even take their whole holiday in the region. These people are extremely independent and flexible and can be enticed to stay even if they have made other plans, as long as the details are right. Relevant facilities could be promoted in UK and France through the specialist press.

## 8.6 Attracting new visitors

In looking at new markets, the research raises a number of issues that suggest opportunities to consider.

### 8.6.1 The over-arching message

As with the existing markets, any campaign should address **the continuing theme of low awareness and/or poor perception** of the two regions. As stated above:

- There is low awareness of most destinations in NPdC
- In Kent, only Canterbury is well known
- Local destination 'brand' awareness is better within the respective domestic markets but weak internationally
- The UK generally is perceived as expensive with poor accommodation and food

Communication should focus on the **acknowledged attributes**<sup>16</sup> over and above the potential for general relaxation (e.g. Kent's *'Relax, Refresh, Inspire'* campaign).

- In NPdC, these are: the coast, local food and drink, the countryside, heritage, events, shopping for a wide range of goods and cultural events and stress the value for money
- In Kent, these are the history/heritage, the pub culture, countryside/villages, museums and the gardens

The two regions both have heritage, countryside, coastal products which are, in general, very similar to many other areas. So, in order to attract visitors, the respective **offers need to be clearly differentiated** from that available elsewhere. To this end, focus groups emphasised **the importance of 'going abroad'** in order to provide something different in one's life; to experience a different culture is a strong driver. Just over half the French respondents would consider staying in NPdC so they can visit England while they are there (Figure 7.30).

Similarly, the research and focus groups identified that **the proximity of the two regions is important** (Figure 7.2)<sup>17</sup>. Convenience is crucial, particularly with children<sup>18</sup> so to be able to travel by car, abroad but not too far away, relatively cheaply must be an opportunity. This is a powerful offer that is implicit in current marketing e.g. NPdC's *'Real France, Real Close'* and KTA's *'So inspiring, So Close'* but needs to be made much more of. It may also be worth emphasising the relatively low environmental impact of a foreign holiday that does not involve flying.

<sup>16</sup> Emphasised in 2000 survey recommendations

<sup>17</sup> This may become more important as congestion grows and people limit their driving

<sup>18</sup> See short break focus group notes

## 8.6.2 Target markets

In geographical terms, **priority should be given to the 'local market'** in close proximity to the channel i.e. 66% of passengers originating in UK come from the South East, East Anglia or London with 17% from Kent. Of those originating in Europe, the majority come from northern France; NPdC and Ile de France account for half the French total, Belgium and the Netherlands.

For those further afield, there is particular opportunity to **focus on friends and relatives**. In Kent, 57% of non UK visitors are staying with friends and relatives and 25% of UK visitors. It was the main purpose of the trip for 26% of the non UK staying visitors and 10% of UK staying visitors (Figures 8.7 and 8.15). In NPdC, the main purpose of the trip was to visit friends and relatives for 9% of staying visitors and 7% stayed with friends and relatives (Figures 7.7 and 7.16). The market is believed to be growing in NPdC.

Watersports and golf are not major attractors in either region (Figures 7.27 and 8.23). They attract relatively **small – but still significant - niches** (10% for golf, 18% for sports activities). Focus groups stressed that walking and cycling were attractions as part of a visit, **adding important value** to the product rather than being products in their own right, linked with heritage. Dedicated walking holidays are not a priority.

**Other niche markets** include:

- Those in campervans i.e. independent older couples and those wanting to indulge their interest such as fishing while economising on accommodation Campervans account for around 2% of passengers (and caravans 1%) (Figure 4.7).
- Coach parties. Coaches account for around 9% of passengers (Figure 4.7).

In profile terms, focus should be placed on the Functional, Cosmopolitan and Habitual Arkleisure segments including mainly older couples.

The research suggests that NPC is not a family/child friendly destination for cross channel tourists<sup>19</sup>. This is probably more a case of poor communication of what is available rather than the products on offer. There is a view, in NPdC, that their beach resources are under-valued and there may also be scope to attract more **family groups**. NPdC has nine resorts which are managed and promoted domestically under the Kid Station brand which offers a quality, accredited product.

## 8.6.3 Initiatives to consider

Initiatives directed at new visitors might include:

- **Local campaigns** targeted at the identified groups across the channel featuring the key attributes of the regions but including time-based campaigns. They should offer 'somewhere different but convenient' with attractive, packaged, easily accessed, special offers linked where possible to major events<sup>20</sup>. The short break focus groups emphasised the importance of events as drivers for short breaks. The French focus groups emphasised the importance of packaging while English visitors are particularly price sensitive.

<sup>19</sup> The number of people coming with children to NPdC has declined but in the summer there is a significant amount of family business.

<sup>20</sup> Emphasised in 2000 survey recommendations

- These campaigns should focus on the **popular themes** using strong, **new bold images** of well-known destinations such as Canterbury or Lille and other attributes such as the beaches, countryside, pubs etc to raise awareness. It is also important to **highlight ease of access to and within the regions**, especially Kent, as this is currently negatively perceived.
- Within the two domestic markets, **focus on the opportunity to visit across the water**. This is the USP. Just over half the French would consider staying in NPdC so they could visit England while they are there (Figure 7.30). At present the NPdC brochure for the French domestic market (Decouverte) has a limited promotion of the opportunity to visit SE England. Kent has more in their domestic brochure along with large adverts from the operators.
- Packages could also include **themed offers** (such as gardening, military history, wining and dining) marketed directly to interested groups through specialist magazines or websites.
- **Special day trip offers** featuring 'something different' i.e. a meal, shopping or heritage trip for Kent or Nord Pas de Calais residents who cross the channel<sup>21</sup>.
- **Raise the profile of individual destinations** (and activities) in all communications within each region, at the expense of the regional titles. For example, promotion in NPdC should no longer refer to the region which includes the negative term Calais and concentrate on the individual towns with the existing strap-line e.g. *'Discover Lille: Real France, Real Close'*. Where the subject is an activity and needs a geographical locus, use the term Northern France e.g. *'Eating Out in Northern France: Real France, Real Close'*.
- In Kent, there were good levels of awareness of destination names such as Canterbury, the Garden of England and White Cliffs Country. These could be developed and promoted in all communications to reflect the key attributes of heritage, rural countryside and the coast.
- Kent needs to be portrayed as a younger, more diverse destination in conjunction with its attractive physical and cultural heritage with its people as a central feature. Local pubs can be promoted as places for visitors to experience a slice of real Kent life, but at the same time must ensure that the quality, especially of food, is high.
- In order to address the perception that Kent is very expensive, **attractions which are free, such as museums and places to wander around in with friends and relatives, should be highlighted**<sup>22</sup>. Good value hotels and restaurants could also be featured<sup>23</sup>.
- Within the two domestic markets, initiate a **VFR campaign** to local residents with a view to attracting the VFR market e.g. building on KTA's 'Big Day Out' campaign with free entry aimed at local residents.
- There is evidence from the survey<sup>24</sup> that festivals and events would be popular draws which could be facilitated through a **special festivals guide** promoted to residents the other side of the channel. This might be done as a reciprocal arrangement between the two

<sup>21</sup> Emphasised in 2000 survey recommendations

<sup>22</sup> Emphasised in 2000 survey recommendations

<sup>23</sup> Specific attractions are not a draw

<sup>24</sup> The Lille City of Culture 2004 appears to have raised the profile of the city

destinations i.e. a combined events calendar. Recent efforts to create and promote joint festivals (which take place on both sides of the channel) have been successful and this approach should be further developed.

- Target the **Comfort Seekers** i.e. those travellers who think that it is very important to be able to relax on a journey by emphasizing the ease of the crossing and that it is an experience in itself<sup>25</sup>.
- There may be an opportunity for local tourism departments to offer a **support service** for cross channel passengers who are delayed or miss their crossings. This could take the form of a helpline number promoted at the ports, or contacts of hotels / restaurants which are easily accessible from the ports.
- Focus groups identified that wider use of the Euro in Kent would be beneficial.

To encourage the niche markets:

- **Coach operators** should be targeted with information on Lille as a city destination along with shopping opportunities (not just alcohol/tobacco) and cultural events. Direct contacts with group organisers and coach operators are crucial. Travel trade manuals can be helpful tools in this respect.
- **Campervan users** can be targeted through their clubs, societies and specialist press, focusing on the attributes of the destinations including special events while emphasising provision for parking and security.
- In the ArkLeisure model, the **higher spending shopping segments** are the Style Hounds, High Street & Cosmopolitans. The Style Hounds and High Street segments are not being attracted to NPdC, probably because it is not perceived as offering the specialist/fashion retailing. If NPdC can develop and promote its quality retail offer and becomes known as a shopping area for more than just alcohol, tobacco or groceries then it could attract more lucrative segments.

## 8.7 Promotional print and other media

Around half the respondents who stopped in Kent or NPdC for more than half a day collected tourist information about the region. The most popular place to pick up the information was en route (Figures 7.28 and 8.24).

A large majority were happy with the information they collected. However, the focus group research pointed out a number of issues in relation to the NPdC marketing literature:

- **Real France, Real Close** is well regarded with a powerful slogan linking distinctiveness with proximity but might be improved with a better map and more compact style.
- **Savoir Plaire** was considered a disappointment and the term unknown. It might be improved by re-focusing on destinations.
- **Welcome Map** serves its purpose but could do with more detail and be in a more usable format/size
- **The Fortified Towns Map** was of limited interest.

In view of these comments and increasing cost of producing such print, there is an argument for **rationalisation**. The *Savoir Plaire* information could be integrated into *Real France, Real*

<sup>25</sup> The main reason for crossing by ferry or tunnel is because it is the shortest crossing or the most convenient route. Price is also a key factor but this usually dictates the carrier.

*Close.* The two maps could be combined but this would mean losing the impact of the fortified towns which probably serves a small but important niche of visitors interested in heritage.

In addition to the production and dissemination of the above print, the other main elements of NPdC's English marketing campaign involves their website, attending travel fairs in London (Vive la France, Pret a Partir and WTM) and PR work supported by some advertising in the press.

The focus groups on the Kent literature were very positive about the guide. Issues emerging included:

- The proximity of Kent to London
- Cynicism about the weather portrayed
- Lack of hotel prices

In addition to their print, the other main elements of KTA's European marketing campaign involves their website, e-mail brochure campaigns twice a year, posters, attending travel fairs in France, Holland and Belgium and PR work supported by some advertising in the press (PR work in France is done by Visit Britain.) The Kent Visitor Guide is used as a fulfilment piece in their Short break campaign which includes the European market. Kent works with Tourism South East to participate in VisitBritain Touring Campaigns in France, Holland, Germany and Belgium.

Neither destination has marketed directly to the cross-channel markets although both have overseas marketing campaigns that assume that most visitors will be coming across the channel. There is some free poster advertising on Eurotunnel and Maison de la France has teamed up with Sea France to promote gourmet breaks in NPdC.

The key media emerging from this research are the printed brochures, respective websites and press relations i.e. features on TV travel shows and travel magazines and supplements, particularly in local papers in the geographical catchment areas. The importance of editorial came out in the focus groups. Emphasis should be given to those newspapers used most frequently by Functionals and Cosmopolitans<sup>26</sup> – and the main destination guidebooks. Functionals are also keen specialist magazine readers.

As stated above, the big opportunity lies with the growing importance of the internet (and the high usage by Functionals). In this context, there is an argument for focusing on short flyers and other products that encourage visits to the respective websites, allowing some **rationalisation of expensive print production**. (Given the low awareness of the attractiveness of the two regions, all communications should focus on providing superb and large images of points of distinction.)

However, the real potential for major change in marketing impact lies with working with the operators.

## 8.8 Working with the operators

Clearly, in order to maximise the potential of reaching existing cross-channel passengers and those currently booking, **the destinations will depend in large part on the co-operation and good will of the operators** (and Port Authorities). This is potentially a very powerful marketing tool.

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<sup>26</sup> These are the Telegraph, Times, Daily Mail and local newspapers

In the past, this has been limited to the display of brochures and some advertising on trains etc. Eurotunnel used to have a destination section on their website that featured Lille and Ashford but this no longer exists.

The key is to **present these campaigns as opportunities to encourage more business**, as much as it is to encourage passengers to choose Kent/NPdc over other UK or continental destinations. In the past, the operators have tried to remain 'neutral' i.e not favouring one destination over another and there have been no efforts to share information with Kent/NPdc.

Ideally, the operators - individually or jointly - will understand this synergy and co-operate, at cost. Operators might be reminded of the long-term benefits of supporting their 'home port-regions', perhaps as part of a longer term ambition to promote the 'Channel Region'. This might be facilitated by **an inter-regional commitment to provide a member of staff to work with the operators exclusively**<sup>27</sup>.

Alternatively, the campaigns could be developed as **joint promotions** involving contributions from both sides, perhaps linked to time-based special promotion and/or packages related to a specific event or activity.

Finally, there is the option of **paying for these services**. Costs will have to be set against other marketing priorities but there is the opportunity here for very effective direct marketing that can be paid for on the basis of results e.g. pay per click on the internet or number of e-newsletters sent out to previous customers on behalf of the destinations.

Where there are existing information services provided by the operators, such as on the ferries, the destination agencies should seek to provide **regular training** so staff are up-to-date with local products and services.

It will also be important to **work with accommodation operators** (and the hypermarkets), providing them with the appropriate information to service their customers and helping them develop packages and special promotions. Marketing support should be linked to relevant training. More accommodation operators need to be encouraged to go on-line.

## 8.9 KTA/NPdc collaboration

It will be **important for KTA and NPdc to work together more closely**. The two regions have worked together in the past<sup>28</sup> but more could be done. The two agencies are looking at the same market(s) and so there is considerable scope for collaboration (in line with the Transmanche element of Interreg bid). For example:

- Reciprocal promotion of the message to domestic visitors to travel across the channel within all brochures, websites etc
- Data sharing/co-operation (protocol needed)
- Joint campaigns (with travel operators) e.g. in the London and Paris markets
- Reciprocal distribution of literature
- Co-funding someone to implement some of these joint initiatives, particularly with operators (see below)

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<sup>27</sup> One of the problems in the past has been the lack of continuity with staff

<sup>28</sup> For example, a brochure called 'Off the motorway' highlighted facilities within 10 minutes of the main routes away from the ports.

- Setting up a joint website (with transport operators) for cross channel passengers with travel information, information about the ports, accommodation listings etc

This initiative might lead to further collaboration e.g. the long-term promotion of the 'Channel Region'<sup>29</sup>.

## 8.10 Collaboration with the respective national tourism organisations

It will be important that these recommendations are brought to the attention of the two respective national tourism organisations (Maison de la France and Visit Britain) and for there to be follow-up consultation on how they can support the various initiatives. In particular, through:

- Facilitating and contributing to joint promotions involving the destinations and operators
- Contributing to relevant communication databases with contact details of people making previous enquiries about the two destinations
- Featuring the two respective destinations in national thematic campaigns as appropriate e.g. spas, festivals, sports
- Better promotion of the two destinations at national contact centres in Paris and London respectively

In addition, because of the proximity of Kent and London, the volume of traffic coming through Kent (and bearing in mind the Olympics) there may be opportunities for KTA to work in collaboration with Visit London and local transport operators (rail, buses etc) to develop reciprocal promotions e.g. the opportunities for visitors staying in Kent to take trips to London and for those staying in London to make use of the attractive, easily accessible countryside of Kent.

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<sup>29</sup> This concept already has some acceptance in long-haul markets.