



Dorset Visitors Survey 2009

(March 2010)

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Executive Summary

Visitor demographics

- The majority of visitors to Dorset reported staying in the area, this remains consistent with 2006, 2007 and 2008
- There was a slight increase in this year's visitor sample of overseas visitors. Overseas visitors most frequently came from Germany, Holland and Ireland.
- UK visitors were most likely to come from the South East or South West regions.
- Half of Dorset visitors were in a group of two adults with no children. There was a slight increase in the number of families coming to the area with children.
- Most visitors were from socio-economic group C1 and C2. In 2009 there has been a rise in visitors from socio-economic grouping C2 and D and a decline from visitors in groups B and C1.
- The majority of respondents were married.
- The majority of respondents had access to the internet at home.

Coming to the Dorset Area

- Bournemouth, Weymouth and Portland and West Dorset were the most frequented places of stay.
- In 2009 there has been a notable increase in first time visitors to Dorset.
- The majority of visitors travelled to the area using their own car (65%). There has been a steady decline of people arriving by car since 2006.
- UK visitors travelled an average of 136 miles to visit the area.

Decision to visit the area

- Devon and Cornwall are Dorset's main competition when visitors are deciding where to visit.
- Visitors chose Dorset over other destinations because they particularly like the area.
- Visitors to Dorset receive information about the area from a previous visit, the internet and from friends and family.
- First time visitors to Dorset are influenced to come to the area from information provided by friends and family and the internet.

- To experience fascinating, beautiful or awe-inspiring places and a relaxing day out with friends and family are important to Dorset visitors when looking for a day out.

Your visit to the area

- Walking remains the most popular activity for visitors to take part in during their time in Dorset. This has remained unchanged for a number of years. There has been a rise in the number of people shopping and visiting gardens compared to previous years.
- The seaside, beaches and coast is the greatest motivation for visitors to come to Dorset. This has remained consistent since 2008. Visitors from overseas were motivated to come to the area because they were visiting friends or family or they wanted to go somewhere they have not been before.
- 97% of visitors had either a very enjoyable or enjoyable time in Dorset.

Staying visitors

- Just over half of staying visitors were on their main holiday.
- Hotels, touring caravan / tent and the homes of friends and family were the accommodation most visitors were staying in.
- Most visitors rated all aspects of accommodation positively although average ratings have dropped slightly since 2008.
- The majority of visitors book their accommodation in advance. Most visitors booked their accommodation between May and August.

Expenditure

- The average spend on food and drink and entertainment and visitor attractions has increased since 2008.
- The majority of visitors said that the credit crunch had little or no affect on their holiday plans for the year. A quarter of visitors said it had had some affect on their plans.

Visitor Profile

- The majority of visitors to Dorset planned to take at least one break in the UK during 2009. Just over a third planned to take at least one short break abroad and just over half planned to take at least one holiday abroad.
- The majority of visitors independently pre organise their trip before taking a short break or holiday in the UK. Visitors are more likely to choose a pre organised holiday package if they are planning a holiday abroad.
- Visitors to Dorset are prepared to pay more for a service if it is something out of the ordinary, to get a better service and to be given individual attention. They are less likely to pay more for products that use the most advanced technology or for a fashionable brand.

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1.0) Introduction

1.1) Background

The Dorset New Forest Tourism Data Project has been profiling the region's visitor market since 1993. This is the latest survey in a series of visitor profiling exercises, designed to produce a timely and reliable picture of the region's tourism market.

The survey identifies and analyses issues such as visitor origins, motivations for visiting, accommodation used and activities undertaken. This information is disseminated to local stakeholders for use in strategic planning, marketing and policy formation.

The Market Research Group, based within Bournemouth University, conducted the research on behalf of the Dorset New Forest Tourism Data Project.

1.2) The Market Research Group

The Market Research Group, based within Bournemouth University (BU), can offer a wealth of experience and expertise in the field of leisure, tourism, heritage, best value and economic impact research at a national, regional and local level.

The Market Research Group (MRG) provides market research and intelligence services to organisations in the service sector and local government.

Using external market research professionals to complete all or part of the consultation and research process can bring together greater legitimacy and independence to the results, expertise and research experience, less disruption to other in house services, and greater resources.

1.3) Methodology

A total of 1007 face-to-face interviews were conducted at various sites across Dorset. Interviewees were selected at random using a Simple Random Sampling technique, whereby each member of the target population has an equal chance of being approached for interview.

As part of the visitor survey fieldwork interviewing took place between July and September of 2009. A variety of interview sites were selected in each of the following areas:

- Bournemouth
- Christchurch
- East Dorset
- Purbeck
- West Dorset
- Weymouth and Portland

1.4) Sample Size and Statistical Validity

A sample size of 1007 completed interviews was achieved.

A sample of 1007 implies that the results are representative of the entire visitor market to within $\pm 3.1\%$ at the 95% confidence level (i.e. there is only 1 chance in 20 of the margin of error contained within the results being greater than 3.1%).

The follow samples were received in each district

Bournemouth - 212
Christchurch - 160
East Dorset - 154
Purbeck - 148
West Dorset - 174
Weymouth and Portland - 148

Year on year comparisons

Throughout the report we have tried to provide year on year comparisons where possible. However these should all be used as indicative only as the districts involved in the visitor's survey have been different each year.

The table below shows each year of the visitor survey, the districts that took part and how the results were reported.

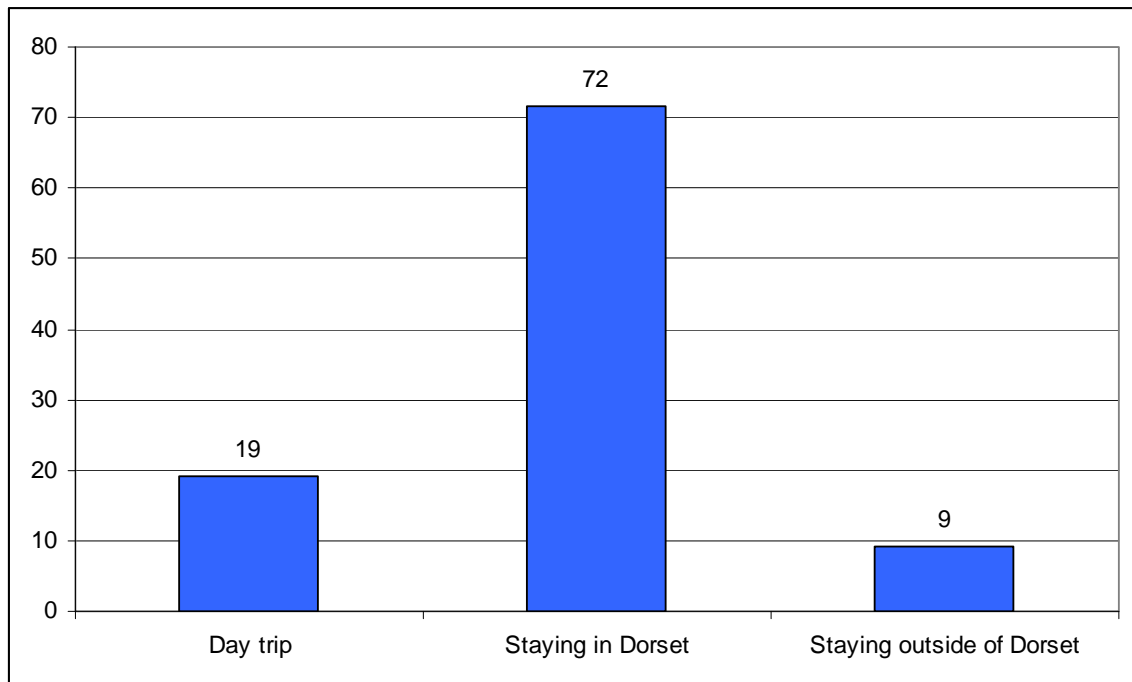
Year	Districts surveyed	Reporting
2004	Bournemouth Christchurch East Dorset New Forest North Dorset Poole Purbeck West Dorset Weymouth and Portland	Joint report (all areas had a district report)
2006	Bournemouth Christchurch East Dorset Purbeck West Dorset	Bournemouth and Dorset had a separate report. (all areas had a district report)
2007	Bournemouth Christchurch East Dorset New Forest Purbeck West Dorset Weymouth and Portland	Bournemouth, New Forest and Dorset had a separate report (all areas had a district report)
2008	Bournemouth Christchurch East Dorset Purbeck West Dorset	Joint report (all areas had a district report)
2009	Bournemouth Christchurch East Dorset Purbeck West Dorset Weymouth and Portland	Joint report (all areas had a district report)

Section 1: Visitor demographic information

Visit type: The majority of visitors to Dorset reported staying in the area which remains consistent from previous years. 19% of visitors were on a day trip and 81% were on a staying trip. 72% of the total visitors were staying in Dorset and 9% were staying in an area outside of Dorset such as the New Forest or Somerset.

For the purpose of this report day visitors are defined as visitors travelling from home.

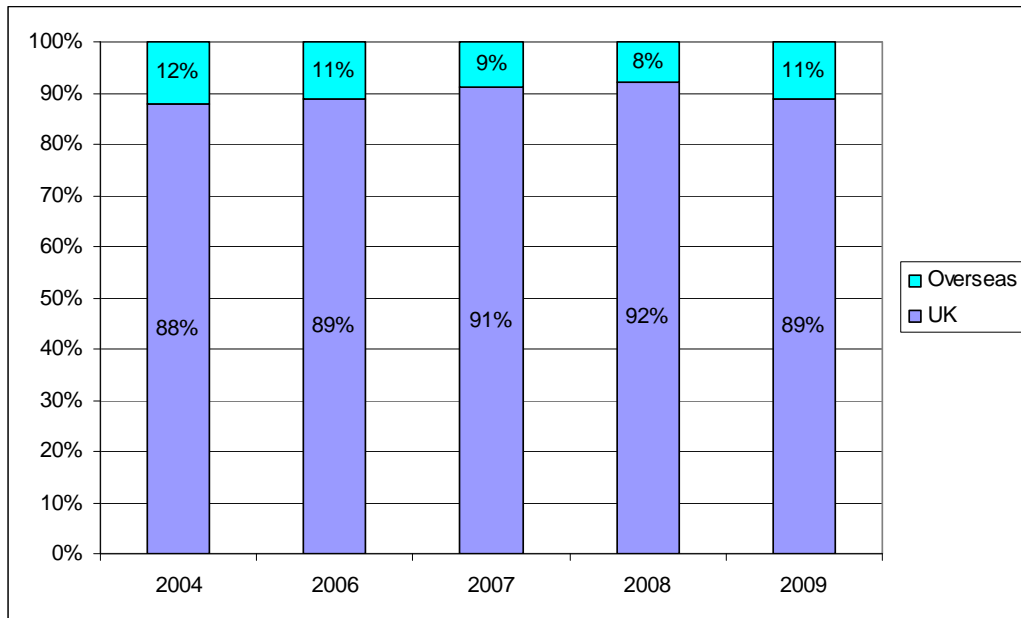
Visit type (%)



(Base: 991)

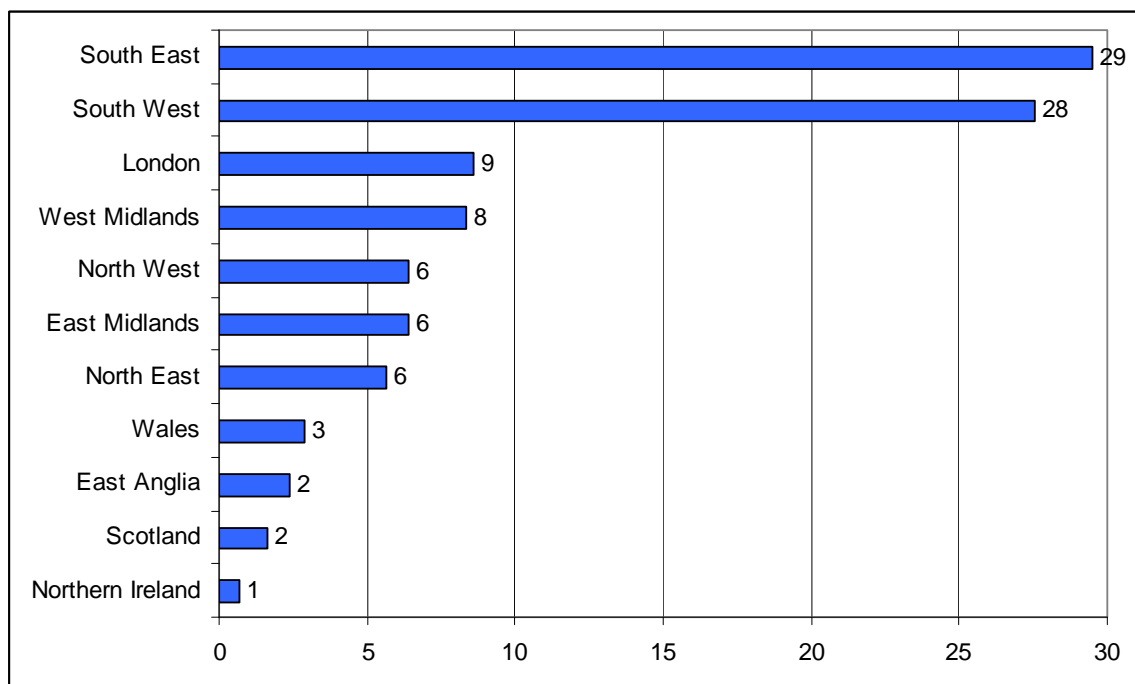
Origin of visitors: There has been an increase of 3% in this year's profile of visitors from overseas. UK visitors most frequently originated from the South East (29%) and the South West (28%). Overseas visitors most frequently originated from Germany (19%), Holland (18%) and Ireland (9%).

Where do you live? (%)



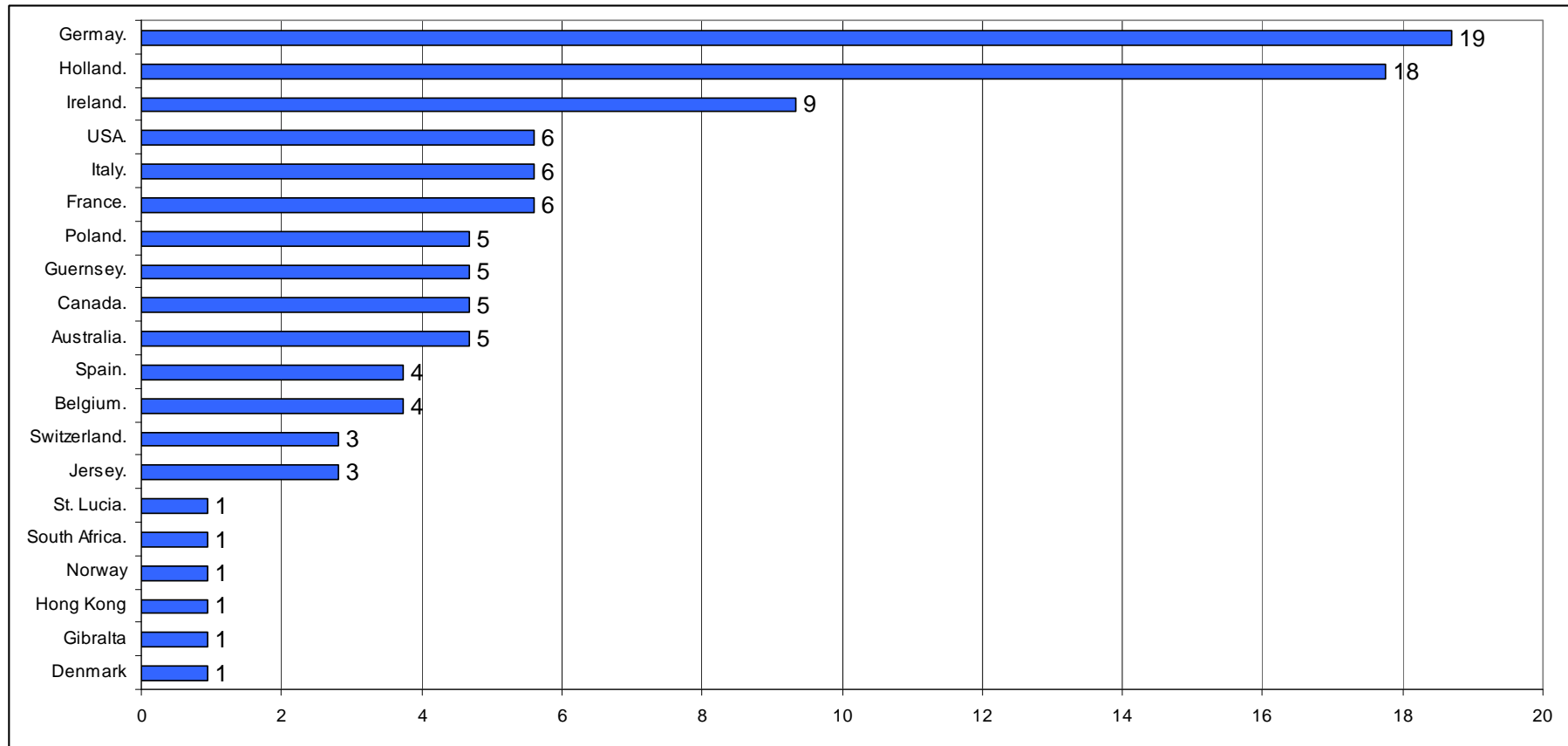
(** - 2004, 2006, 2007 (figures from DCC only)
(Base 2009: 1007)

Which Region do you live in? (%)



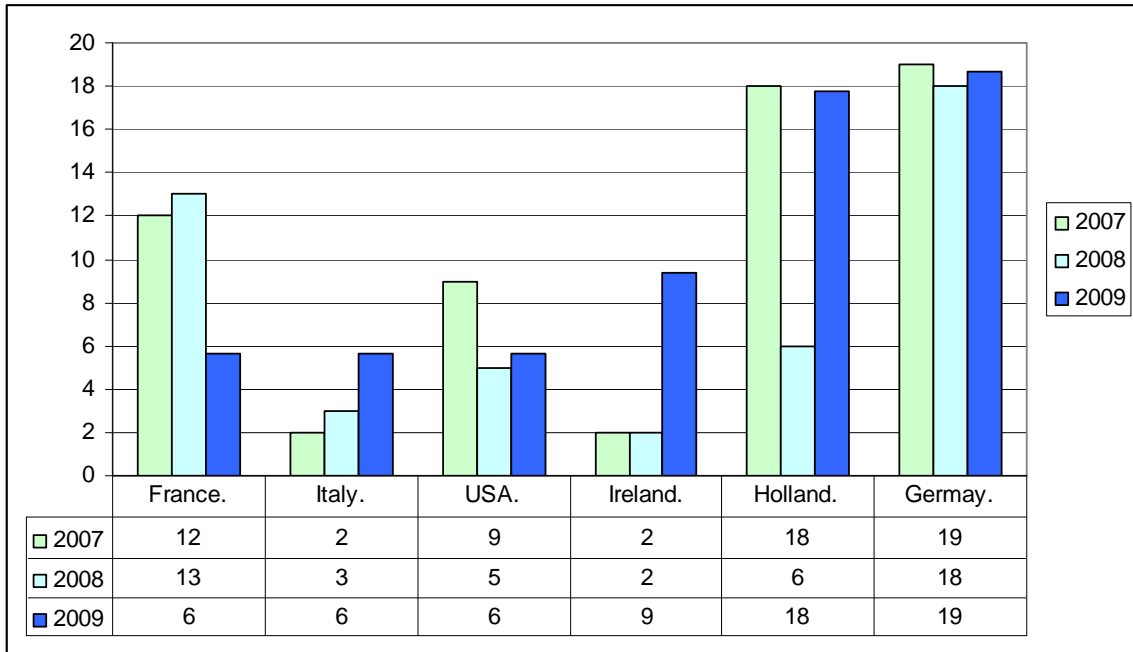
(Base: 872)

Which country do you come from? (%)



(Base: 107)

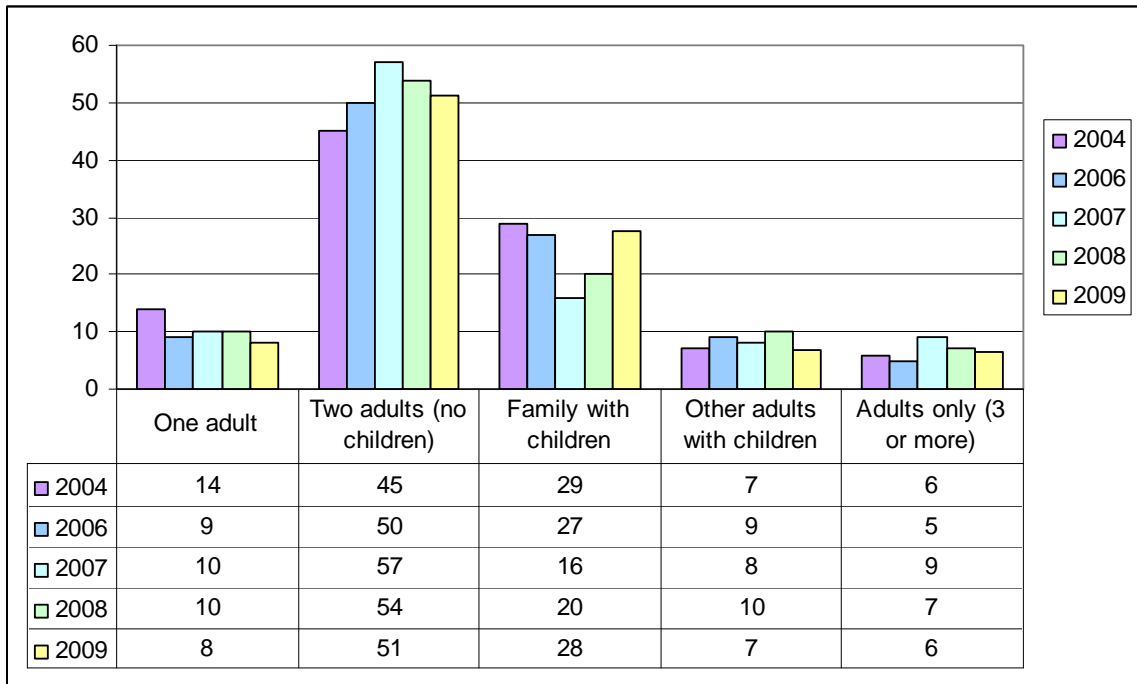
Non – UK visitors origin top 6 (%)



* Results above should be used as indicative only as samples are small. (Base 2009: 62)

In 2009 the profile of visitors from abroad has changed slightly. Visitors from Germany remain the highest percentage proportion of overseas visitors to Dorset. There has been an increase in the percentage of visitors from Holland after a decline in 2008. There has also been a rise in the percentage of visitors from Ireland and Italy. There has been a 7% decline in the percentage of visitors from France.

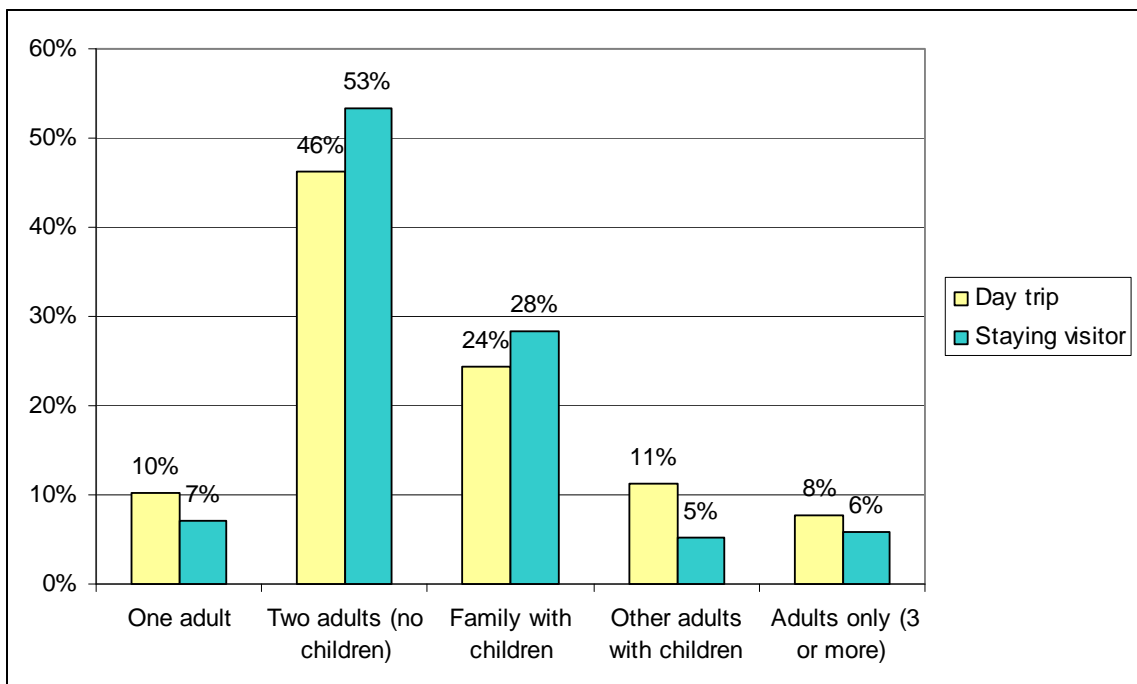
Group type (%)



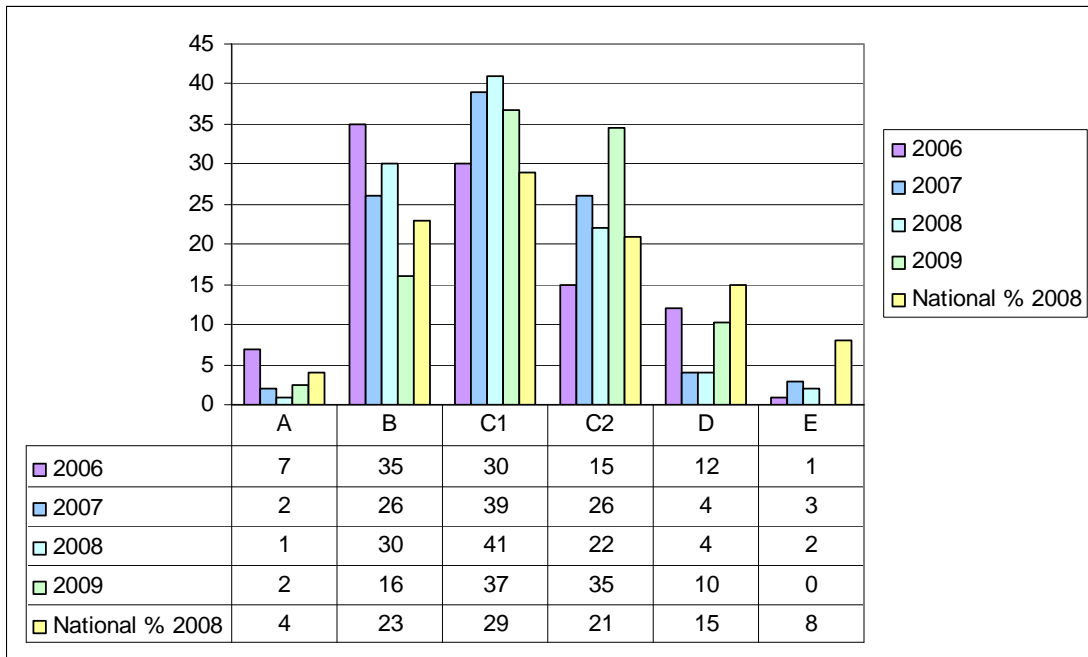
(Base 2009: 945)

Group type: In line with previous years the majority of respondents were visiting in a group of two adults with no children. The visitor profile in 2009 has seen an increase in families coming to the area with children.

Group type by day/stay (%)



Socio-Economic Group (%)

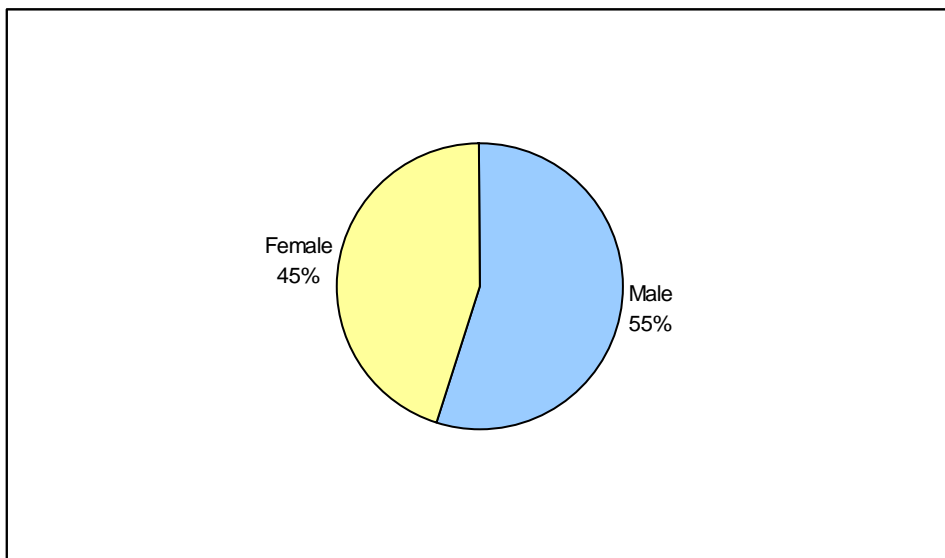


(Base 2009: 992) *national figure taken from the national readership survey 2008

In 2009 there has been a rise in visitors from socio-economic grouping C2 and D and a decline from visitors in groups B and C1.

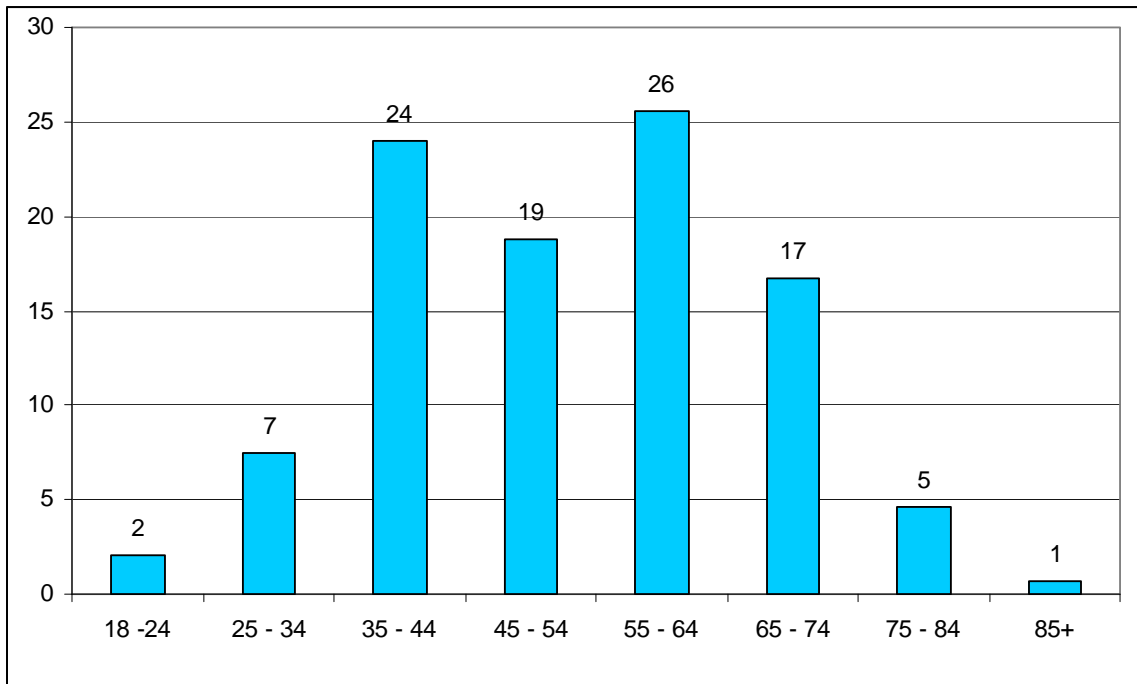
Interviewee demographic

Gender of person being interviewed (%)



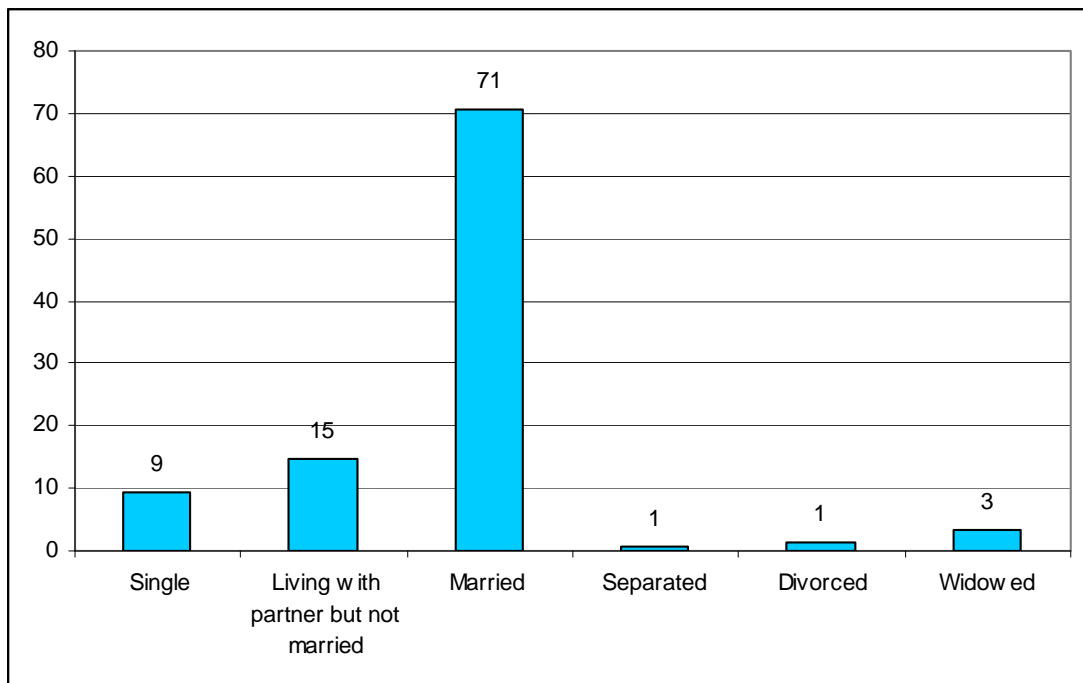
(Base: 982)

Age group of person being interviewed (%)



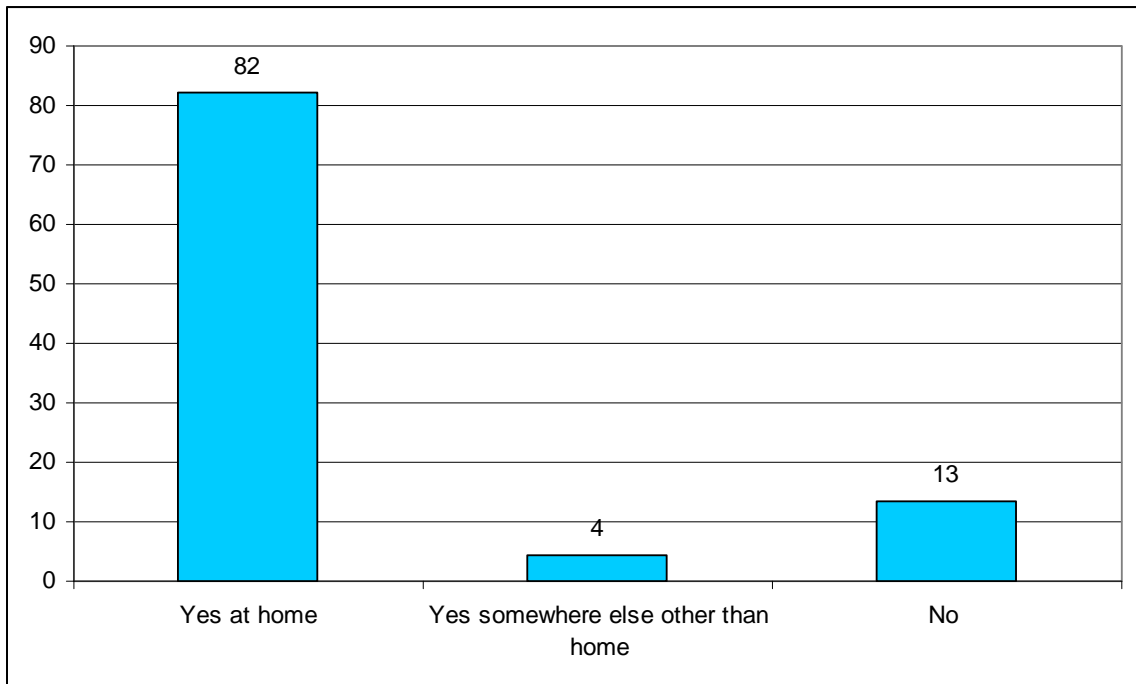
Base (908)

What is your marital status? (%)



(Base:940)

Do you have access to the internet? (%)



(Base 923)

Age and gender of group

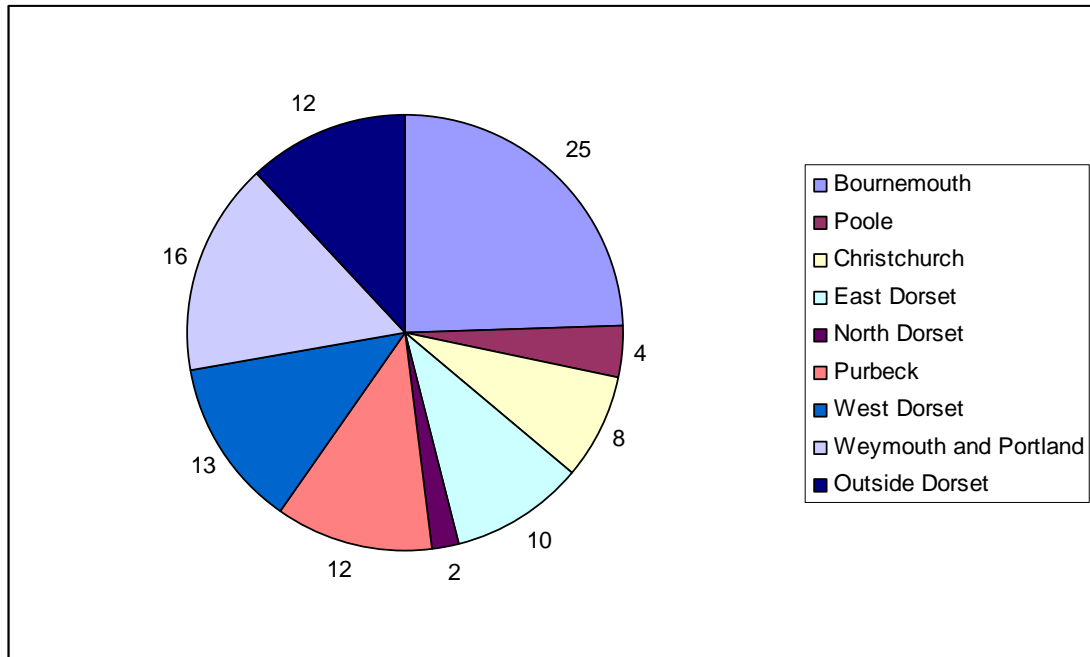
How many people in your immediate group are male and female and which age groups do they belong to?		
	% of profile	% of UK population
0 - 15 years - Male	11	10
0 - 15 years - Female	11	9
16 - 24 years - Male	3	6
16 - 24 years - Female	3	6
25 - 34 years - Male	2	6
25 - 34 years - Female	4	6
35 - 44 years - Male	8	7
35 - 44 years - Female	10	8
45 - 54 years - Male	7	7
45 - 54 years - Female	6	7
55 - 64 years - Male	9	6
55 - 64 years - Female	10	6
65+ years - Male	8	7
65+ years - Female	8	9

Section 2: Coming to Dorset.

Location of stay for staying visitors: As mentioned in section 1 19% of visitors to Dorset were on a day trip and 81% were staying in or around the Dorset area. Of staying visitors 25% stayed in Bournemouth, 16% in Weymouth and Portland and 13% in West Dorset.

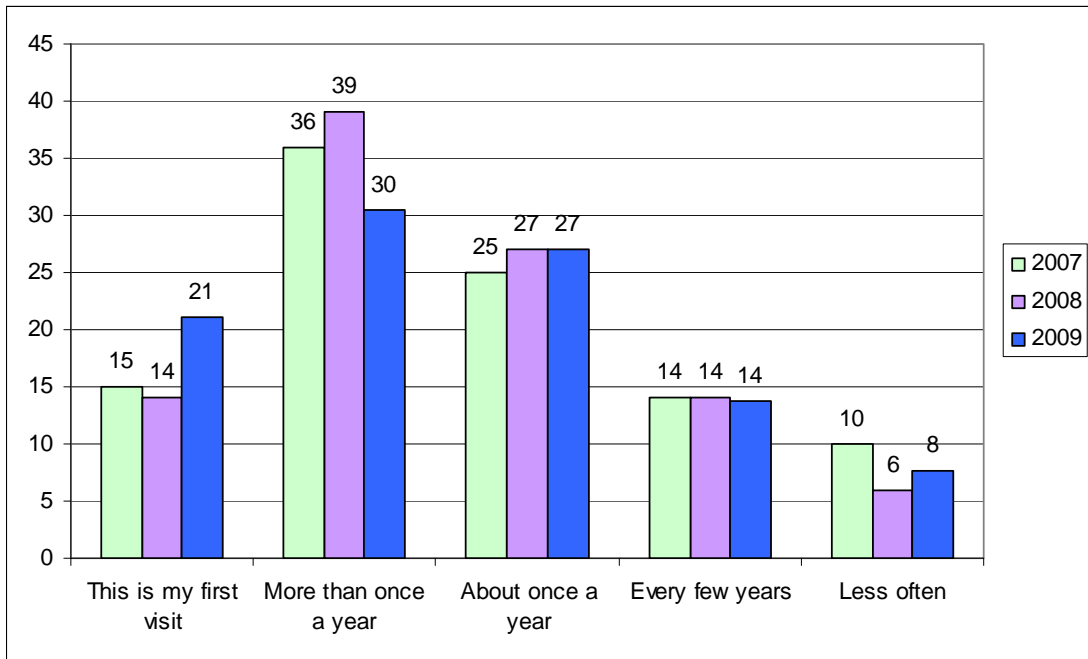
12% of staying visitors were staying outside the Dorset area in places like the New Forest.

Area where staying visitors were staying (%)



(Base: 763)

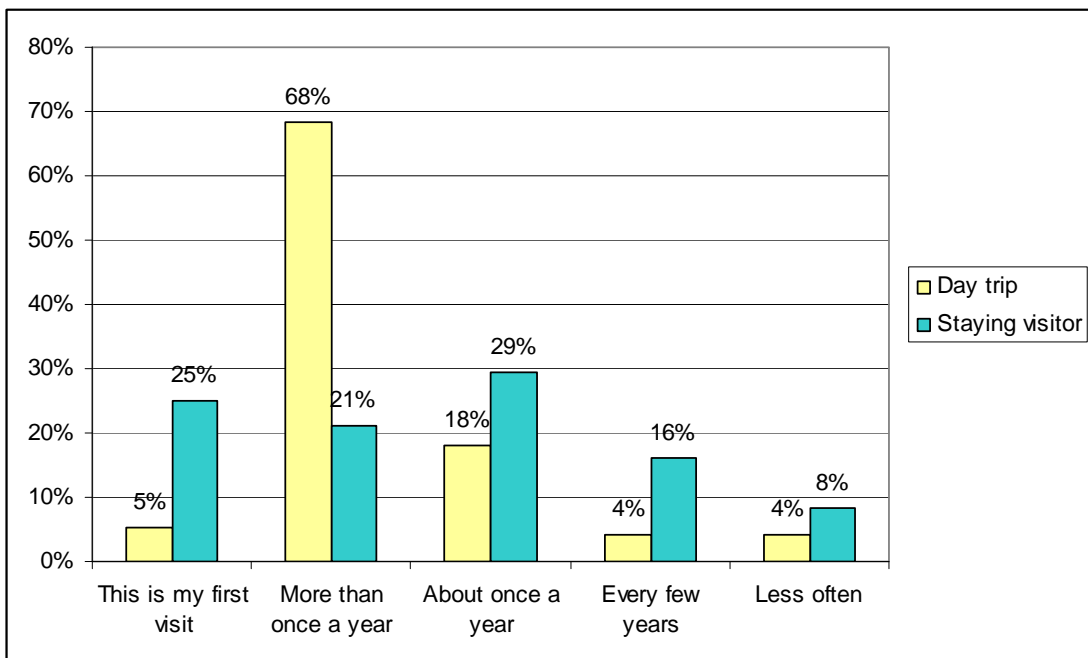
How often do you visit the area? (%)



(Base 2009: 963)

The 2009 visitor's survey has seen a notable increase in first time visitors with less visitors stating that they have visited the area more than once a year.

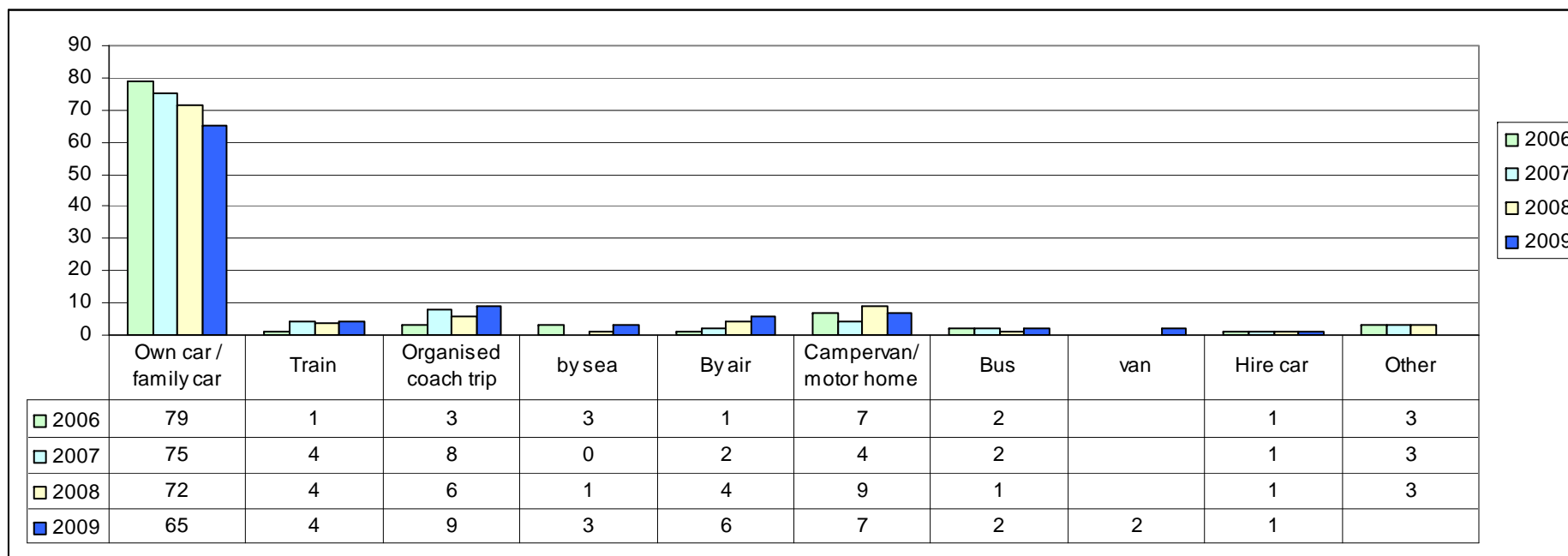
How often do you visit the area? (by day/stay)



Day visitors to the area are more likely to visit on a regular basis than staying visitors. 68% of day visitors visit the area more than once a year.

Transportation to Dorset

Method of travel from home (%)

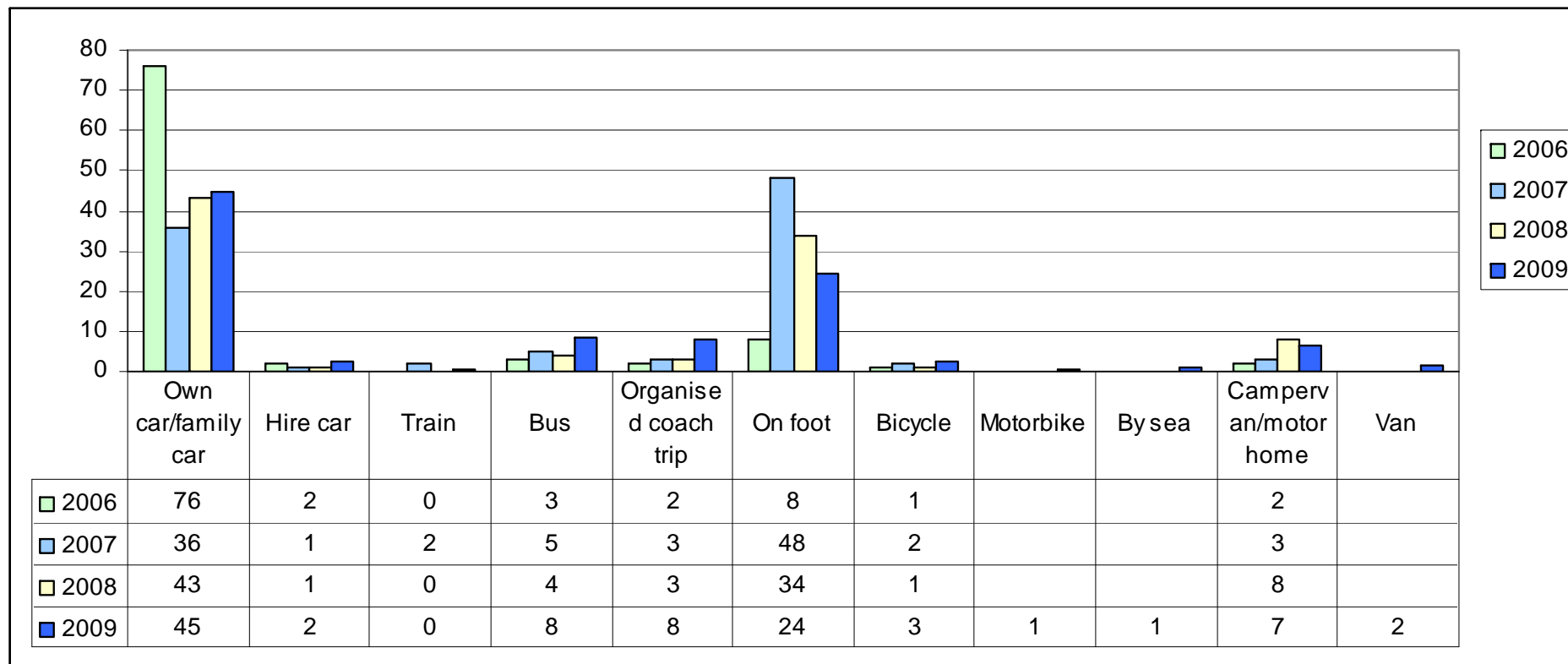


(Base 2009: 990)

(blank spaces in the table indicate that this option wasn't offered in this year)

Since 2006 there has been a decline in the number of visitors travelling to the area by car, the decline of 7% in 2009 was the greatest since 2006. There has been a slight increase in the number of people travelling to the area by organised coach trip and by air.

Method of travel around the area (%)



(Base 2009: 980)

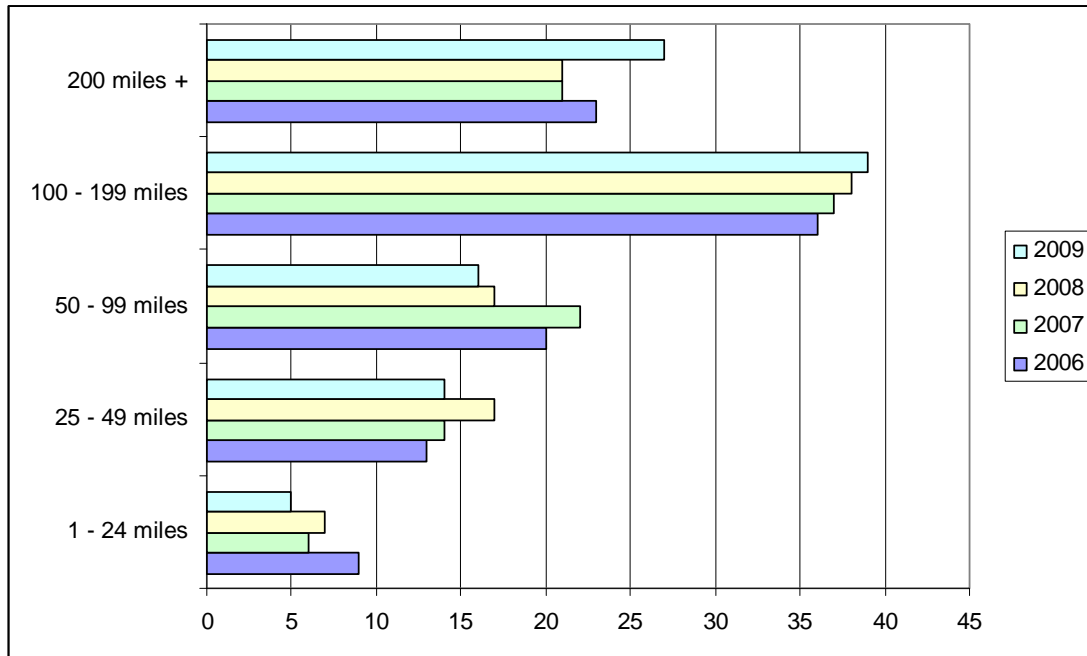
(blank spaces in the table indicate that this option wasn't offered in this year)

(In 2007 there was an increase in the interviews conducted in Bournemouth and Weymouth area. This could account for the increase in visitors who reported that they had travelled around the area by foot.)

In 2009 there was a decrease in the number of people travelling round the area by foot and a slight increase in the number of visitors using the bus and organised coach trip.

Distance travelled: The average distance travelled by UK visitors to the area was 136 miles. The average distance travelled by UK residents on a day trip was 76 miles. The average distance travelled by UK residents on a staying trip was 162 miles.

Distance travelled to the area (%)



(Base 2009: 895)

In 2009 we can see that visitors have travelled a further distance to get to Dorset compared to any other year. However this can be explained by the number of visitors travelling from abroad in this year's sample.

Section 3: Decision to visit the area

Competitive destinations: Visitors were asked were they considering going to any other destinations instead of Dorset. MRG's face to face researchers said that most people stated that Dorset was their number one choice and that they hadn't really considered going anywhere else.

Of those who had considered going somewhere else Devon and Cornwall were Dorset's competitive destinations. This was also the case when this question was asked in the 2007 visitor's survey.

Top 10 competitive destinations		
	<i>f</i>	%
Devon	87	34
Cornwall.	41	15
France.	17	7
Hampshire	17	7
East Sussex.	11	4
Wiltshire.	8	3
Lake district.	6	2
Scotland.	6	2
Somerset.	6	2
Spain.	5	2

Of those visitors who had thought about visiting other destinations their reasons for choosing Dorset was that they particularly liked the area (18%), had friends and family in the area (13%), or they were touring the area (13%).

Why did you choose this area instead of an alternative destination? (Q6)	
	%
Friends and family in the area	13
Particularly like the area	18
Have visited before	11
Second home	0
Touring the area	13
Recommendation	5
Unable to go abroad	4
I liked the look of the area from the internet/brochures	5
Specific event (please specify)	3
Other (please specify)	28
Total	100

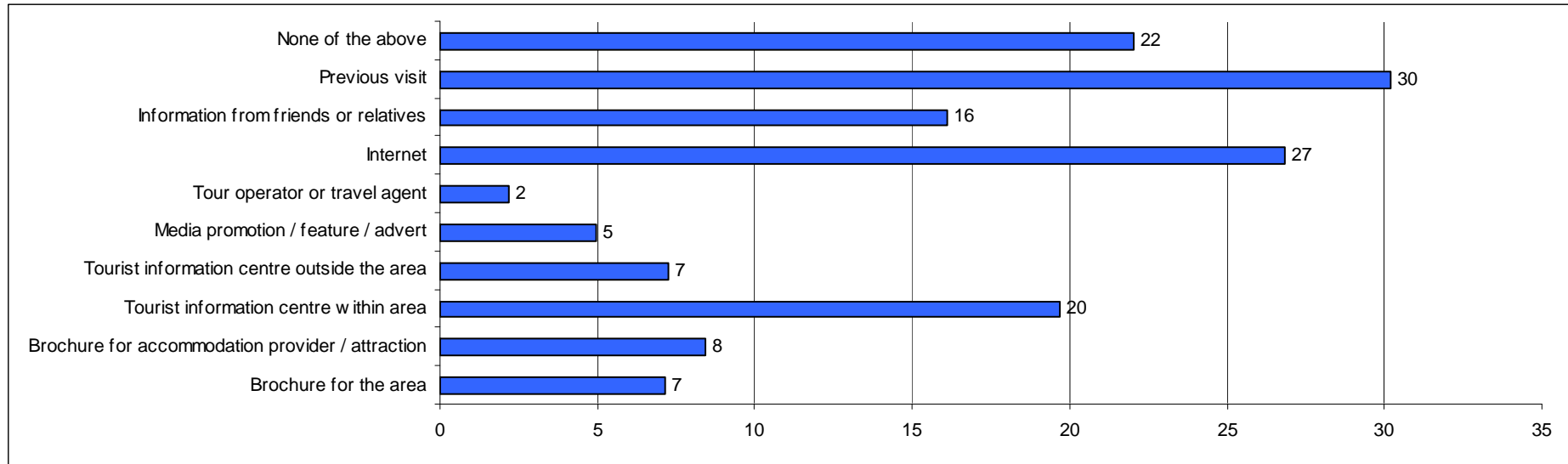
(Base: 475)

Only 4% of visitors said their main reasons for choosing the area was because they were unable to go abroad.

If you were unable to go abroad why was this?	
* small base number these figures should be used as indicative only.	
	%
Exchange rate	74
Mobility issues/age	5
Economic situation	16
Transport issues	11
Other	5

Information about the area

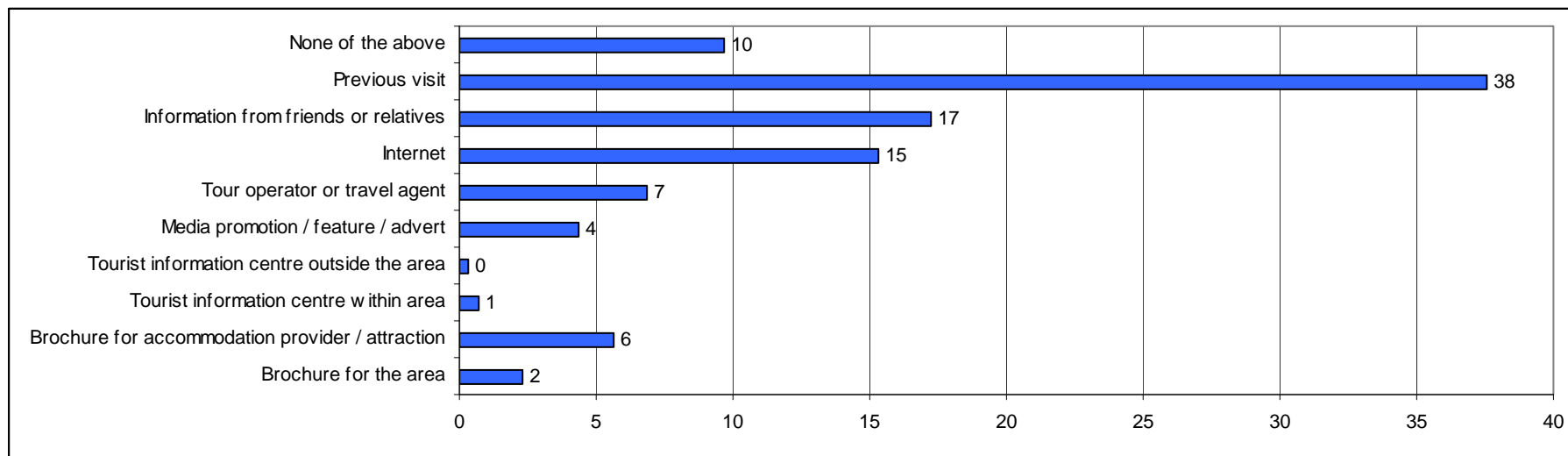
Which of the following have you received information about the area from in the last 12 month? (%)



(Base: 1007)

Visitors received information about the area either from a previous visit (30%), the internet (27%), Tourist information within the area (20%) and from friends and relatives (16%). Visitors were less likely to receive information from tour operators (2%) and media promotion (5%).

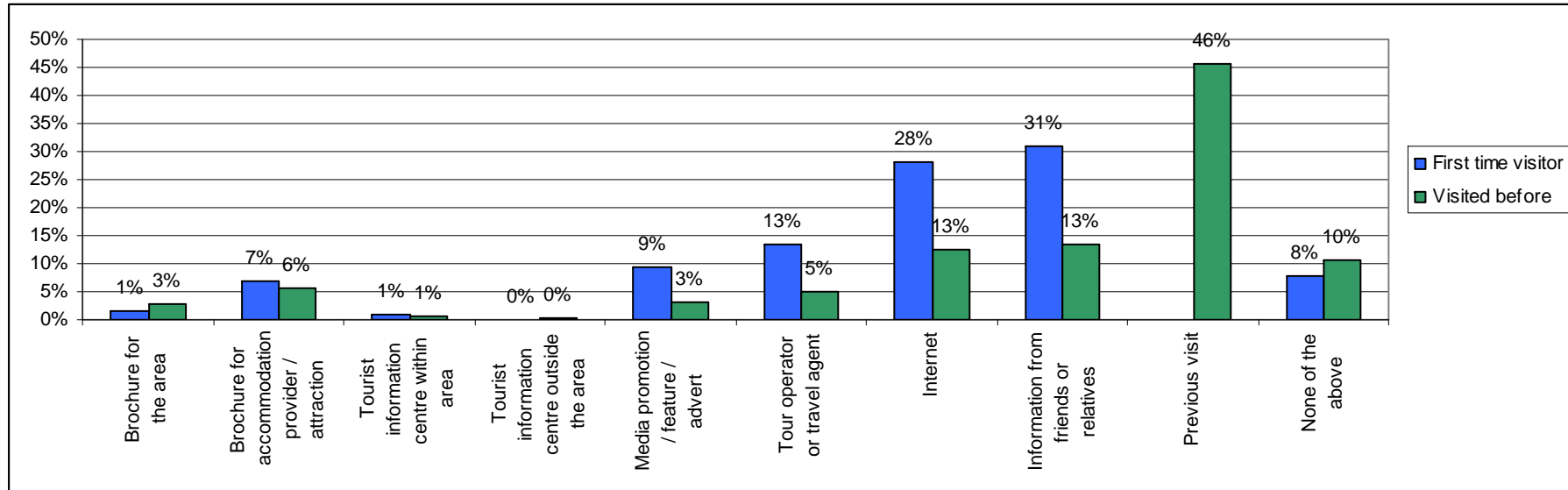
Which of the following sources was the most influential in your decision to visit? (%)



(Base: 991)

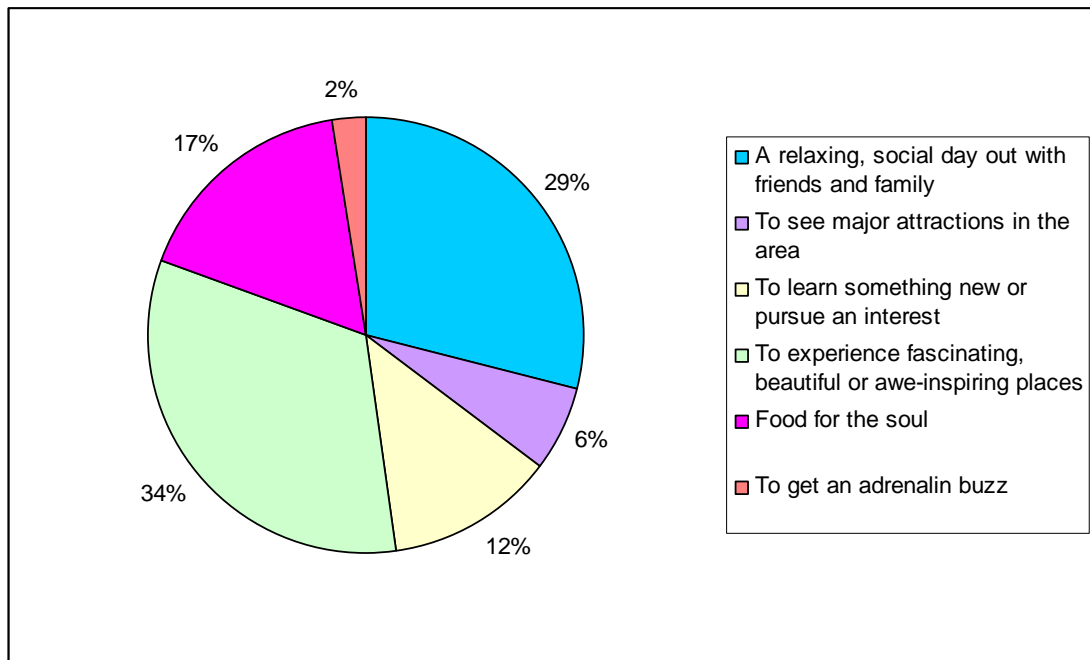
A previous visit was the most influential source in motivating visitors to come to the area followed by information from friends or relatives and the internet. Tourist information centres, media promotion and brochures were the sources which influenced visitors the least.

Which of the following sources was the most influential in your decision to visit? (First time/previous visitor) (%)



For first time visitors, information from friends and family (31%), internet (28%) and tour operators (13%) are the most influential in their decision to visit.

What is most important to you when looking for a day out? (%)

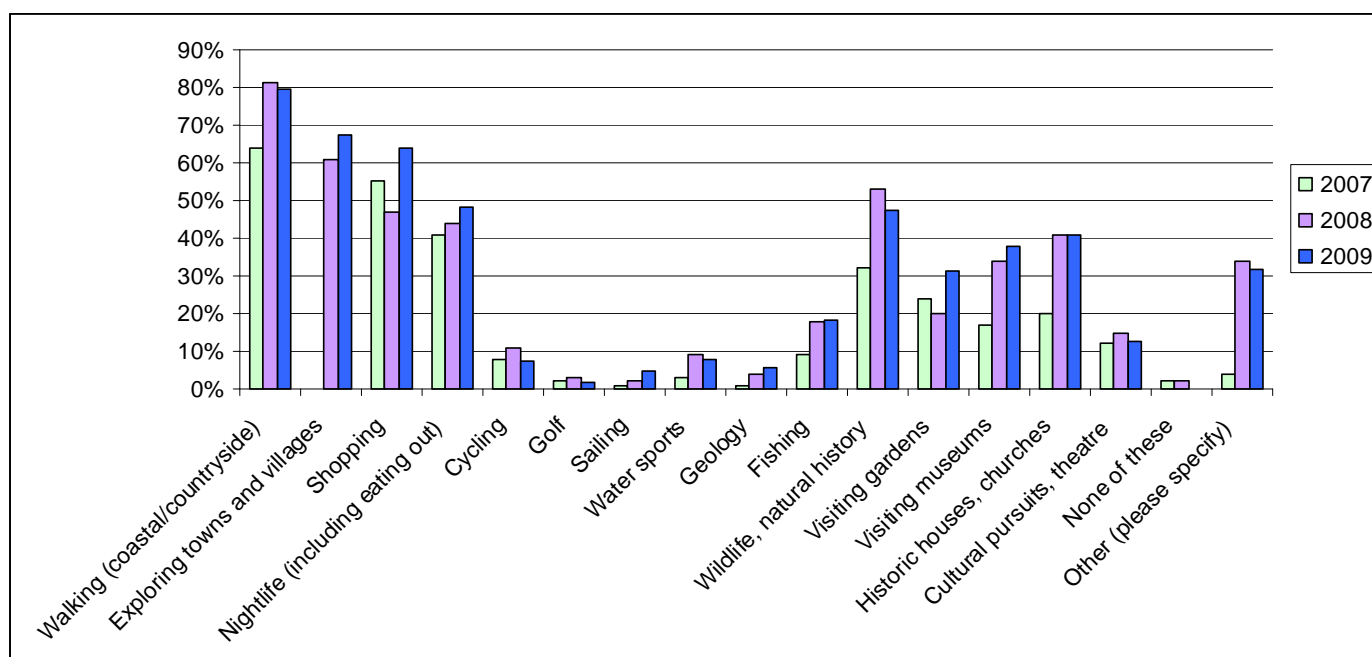


(Base: 934)

“To experience fascinating beautiful or awe inspiring places” (34%) and “a relaxing social day out with friends and family” (29%) were the most important factors for Dorset visitors when choosing a day out. “To get an adrenalin buzz” (2%) and “to see major attractions in the area” (6%) were the least important factors.

Section 4: Your visit to the area.

Which of the following activities, if any, have you or members of your immediate group taken part in during your visit?



(Base 2009: 989)

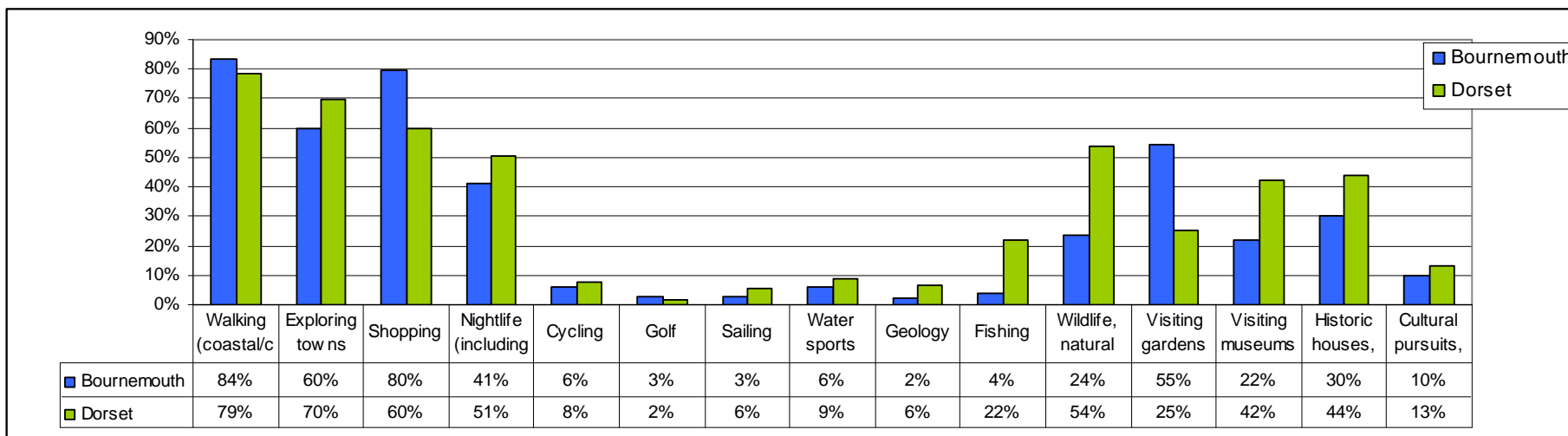
Which of the following activities, if any, have you or members of your immediate group taken part in during your visit?				
	2007	2008	2009	% +/- 08-09
Walking (coastal/countryside)	64%	81%	80%	-1
Exploring towns and villages	*	61%	67%	+6
Shopping	55%	47%	64%	+17
Nightlife (including eating out)	41%	44%	48%	+4
Cycling	8%	11%	7%	-4
Golf	2%	3%	2%	-1
Sailing	1%	2%	5%	+3
Water sports	3%	9%	8%	-1
Geology	1%	4%	6%	+2
Fishing	9%	18%	18%	=
Wildlife, natural history	32%	53%	47%	-6
Visiting gardens	24%	20%	31%	+11
Visiting museums	17%	34%	38%	+4
Historic houses, churches	20%	41%	41%	=
Cultural pursuits, theatre	12%	15%	13%	+2
None of these	2%	2%	0%	-2
Other (please specify)	4%	34%	32%	-2

* not an option in 2007

In line with previous years, walking on the coast or in the countryside was the top activity for visitors followed by exploring towns and villages. There has been an increase of 17% in the amount of visitors taking part in shopping. This could be explained by the different district areas included in the visitors survey this year (Weymouth and Portland were not included in 2008).

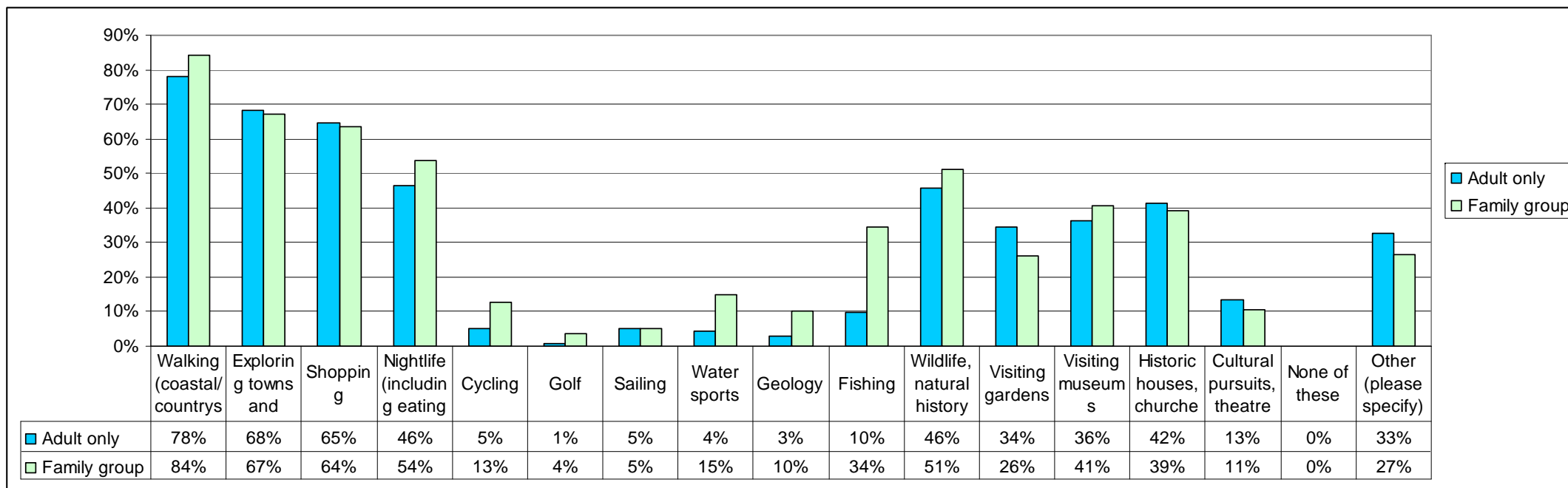
There was an 11% increase in those who visited gardens in 2009 compared to 2008. Other activities which saw a percentage increase in 2009 were; exploring towns and villages, nightlife, museums, sailing and cultural pursuits and theatre visits.

The largest decrease was the figure for visitors taking part in wildlife and natural history which has decreased by 6% from 2008.



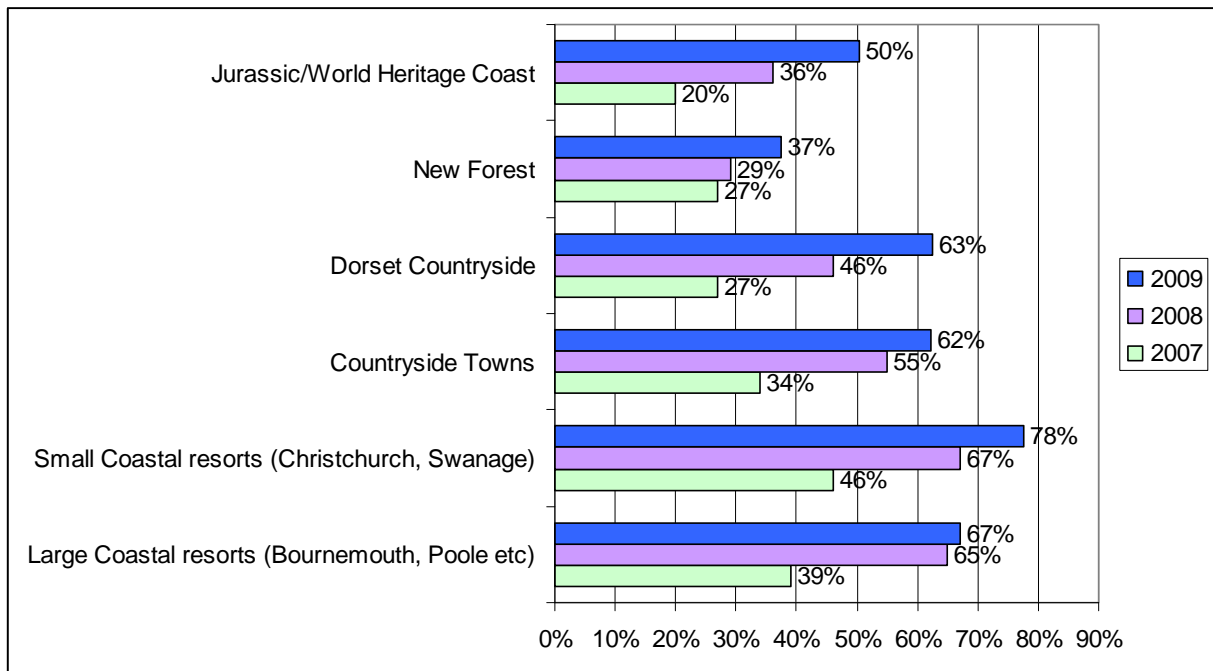
When visitors are broken down by interview area we can see that the top three activities from the whole sample remain the same for the Bournemouth and Dorset area. Visitors to the county council area of Dorset are more likely to visit or take part in; exploring towns and villages, fishing, wildlife and natural history and visiting museums and historic houses than visitors to Bournemouth. Visitors to Bournemouth are more likely to visit or take part in shopping and visiting gardens.

**Which of the following activities, if any, have you or members of your immediate group taken part in during your visit?
(by visiting group)**



Visitors with children and adult only visitors generally take part in similar activities whilst visiting Dorset. Families are more likely to take part in cycling, watersports and fishing compared to adult visitors who are more likely to visit gardens.

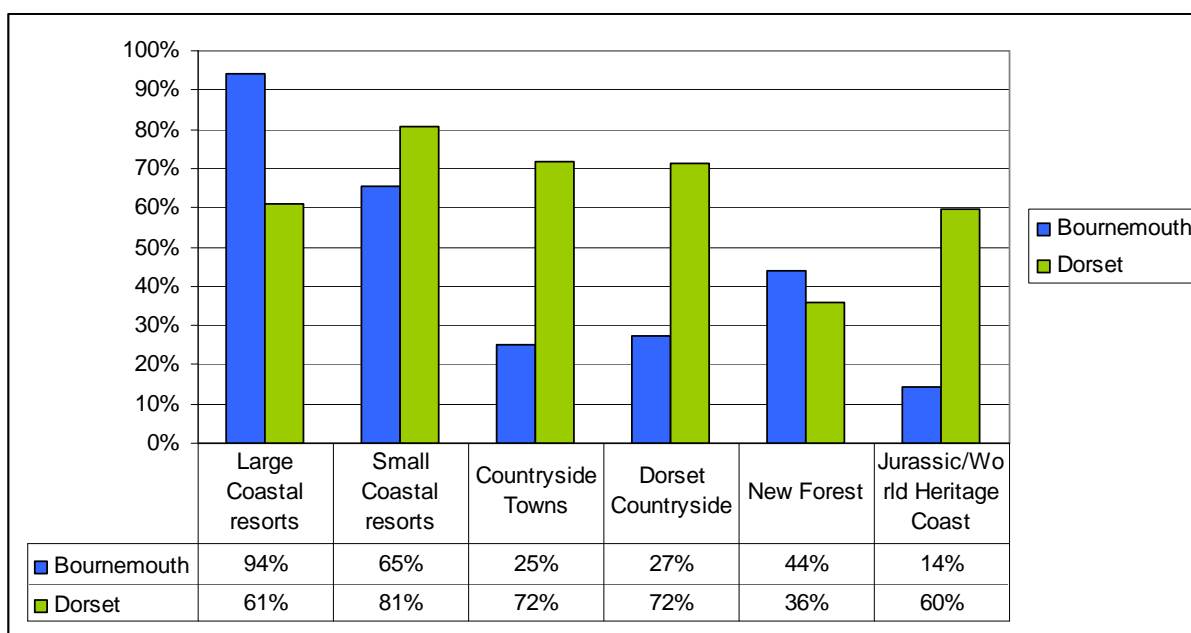
Which of the following areas have you also visited / intend to visit during your current stay?



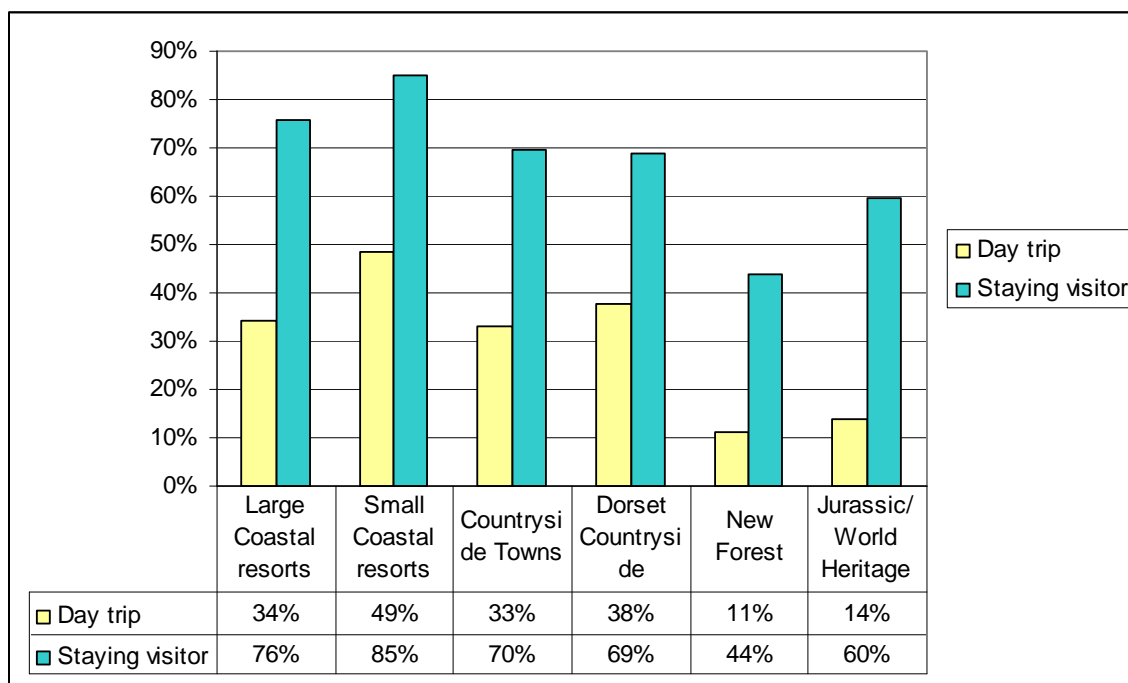
(Base 2009: 984)

There has been an increase in the number of people visiting all the different areas in and around Dorset since 2008. The area which has seen the greatest increase in visitors is the Dorset Countryside which has risen by 17% followed by the Jurassic coast which has seen a rise of 14%.

Which of the following areas have you also visited / intend to visit during your current stay? (Bournemouth/Dorset) (%)



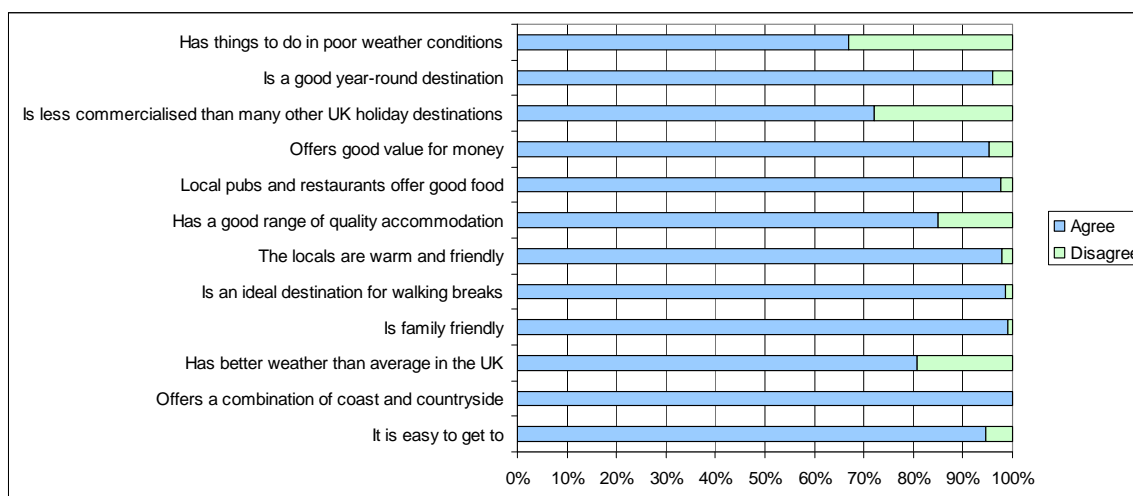
When the results are broken down by interview area we can see that visitors to Bournemouth said that they will/had visit(ed) a large coastal resort, small coastal resorts and the New Forest. Visitors to Dorset will/had visited(ed) small coastal resorts, countryside towns, Dorset countryside and the Jurassic/World Heritage coast.



The most visited areas for respondents on a day trip were small coastal resorts, large coastal resorts and the Dorset countryside. The most visited areas for respondents on a staying trip were small coastal resorts, large coastal resorts, countryside towns and the Dorset countryside.

Statements about Dorset

Do you agree or disagree with the following statements about the area? (%)



	Agree	Disagree
It is easy to get to	95%	5%
Offers a combination of coast and countryside	100%	0%
Has better weather than average in the UK	81%	19%
Is family friendly	99%	1%
Is an ideal destination for walking breaks	99%	1%
The locals are warm and friendly	98%	2%
Has a good range of quality accommodation	85%	15%
Local pubs and restaurants offer good food	98%	2%
Offers good value for money	95%	5%
Is less commercialised than many other UK holiday destinations	72%	28%
Is a good year-round destination	96%	4%
Has things to do in poor weather conditions	67%	33%

The highest rated statements about Dorset were;

- Offers a combination of coast and countryside
- Is family friendly
- Is an ideal destination for walking breaks.

The lowest rated statements about Dorset were

- Has things to do in poor weather conditions
- Is less commercialised than many other UK holiday destinations.

Net % agreement to Dorset statements 2008/2009

	2008	2009	+/- %
It is easy to get to	76%	89%	+13
Offers a combination of coast and countryside	95%	100%	+5
Has better weather than average in the UK	92%	62%	-30
Is family friendly	98%	98%	=
Is an ideal destination for walking breaks	98%	97%	-1
The locals are warm and friendly	98%	96%	-2
Has a good range of quality accommodation	92%	70%	-22
Local pubs and restaurants offer good food	97%	95%	-2
Offers good value for money	98%	91%	-7
Is less commercialised than many other UK holiday destinations. *	94%	44%	-50
Is a good year-round destination	93%	92%	-1
Has things to do in poor weather conditions	42%	34%	-8

*slight change of wording was used for this option in 2008 "Is more un-commercialised than many other UK holiday destinations".

The table above shows the net agreement rating for each of the statements in 2009 and 2008. The net agreement rating measures the balance of opinion.

We can see that from 2008 some of the statements have dropped quite dramatically. Dorset 'has better weather than average in the UK' and 'has a good range of quality accommodation'. It was noted in 2008 however that opinions of Dorset in this year were overwhelmingly positive.

Two statements from 2008 saw an increase in their net % in 2009, 'It is easy to get to' increased by 13% and 'Offers a combination of coast and countryside' increased by 5%.

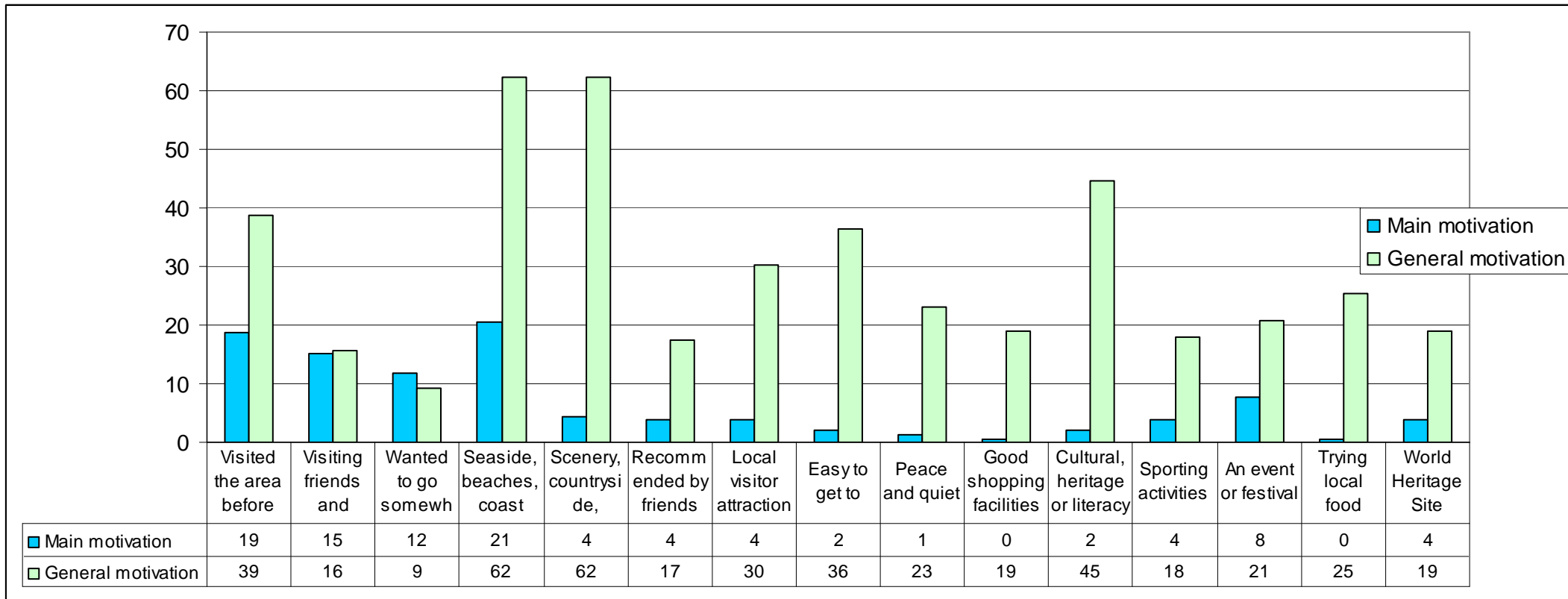
Distance travelled for a day out: Visitors were asked whilst they were in the Dorset area how far would they travel for a day out. The average number of miles visitors to the whole of Dorset would travel is 45 miles. We can see that day visitors are prepared to travel further than staying visitors. Visitors to Bournemouth are prepared to travel the least and visitors to East Dorset are prepared to travel the furthest.

How far would you travel for a day out? (miles)

	<u>Mean</u>
All visitors	45.09
Day visitors	63.44
Staying visitors	41.18
Bournemouth visitors	26.84
Christchurch visitors	43.62
East Dorset visitors	54.10
Purbeck visitors	47.54
West Dorset visitors	49.26
Weymouth visitors	51.25

Motivation for visiting the area

What was your main and general motivation for visiting the area (%)



(Base 16a: 984)

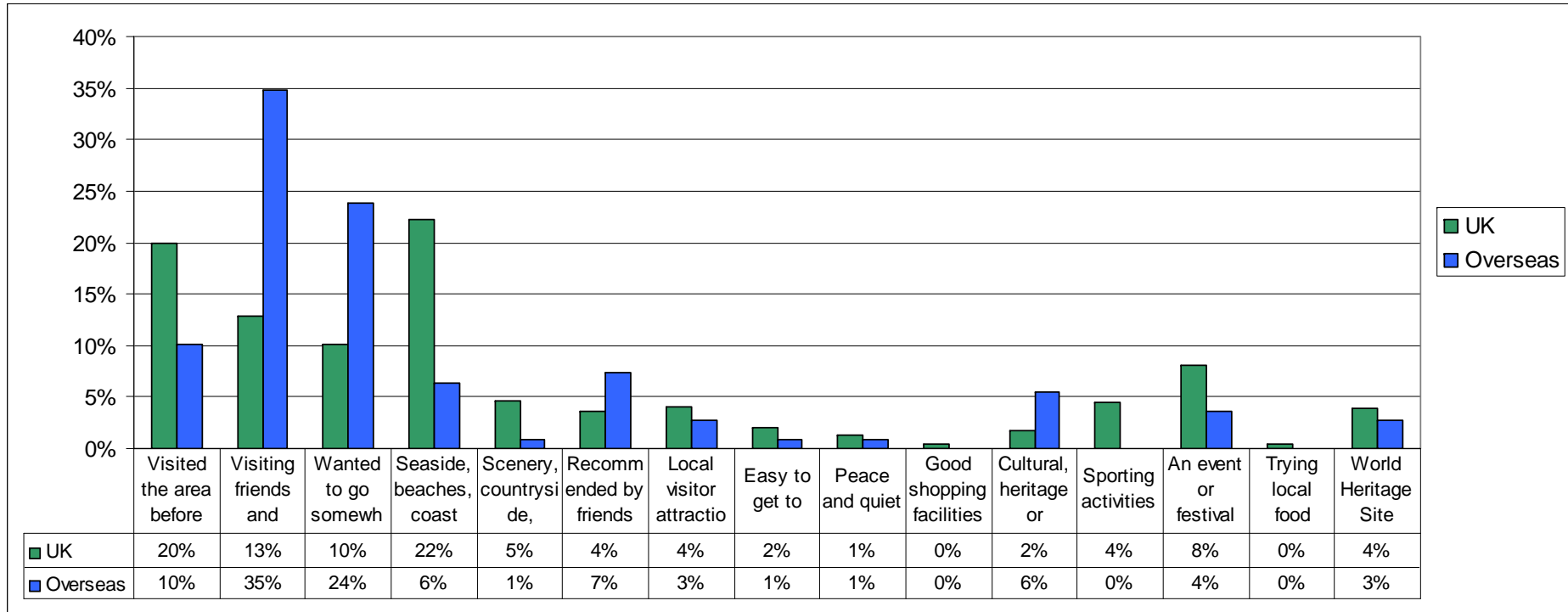
(Base 16b: 1007)

The seaside, beaches and coast were the most popular motivation for visitors to come to Dorset. This was followed by “visited the area before and liked it” and “visiting friends and relatives”. When respondents were asked about their general motivations for visiting the area again the seaside, beaches and coast was highlighted as the most popular reason but also the same number of respondents chose ‘scenery, countryside and natural history as a general motivation to visit the area.

This question was asked in a different way in 2008 so it is not possible to make a direct comparison. However the top five rated motivators for visiting the area in 2008 were,

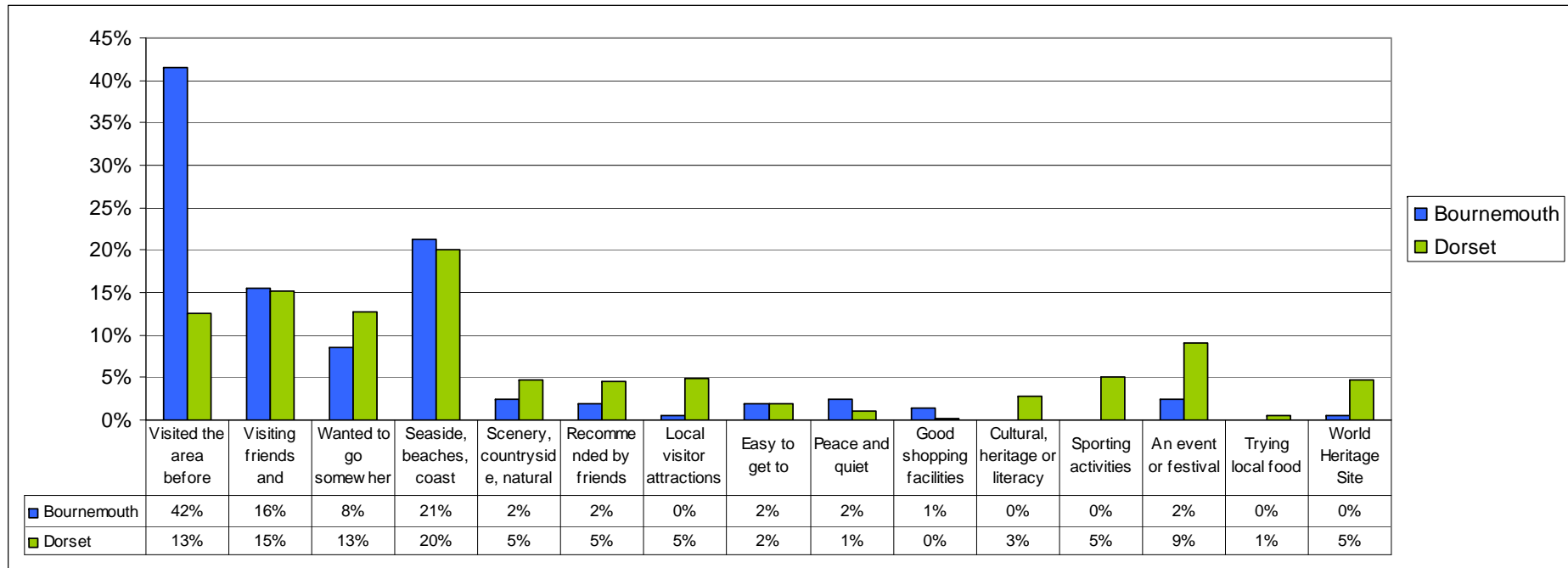
- 1.) Seaside, beaches, coast (78%)
- 2.) Visited the area before and liked it (77%)
- 3.) Scenery, countryside, natural history (77%)
- 4.) Easy to get to (61%)
- 5.) Peace and quiet (48%)

What was your main motivation for visiting the area? (by UK and Overseas visitors)



Overseas visitors were motivated to come to the area because they were visiting friends and family and wanted to go somewhere they had not been before. UK visitors were motivated to come to the area because of the seaside, beaches and coast and they had visited the area before and liked it.

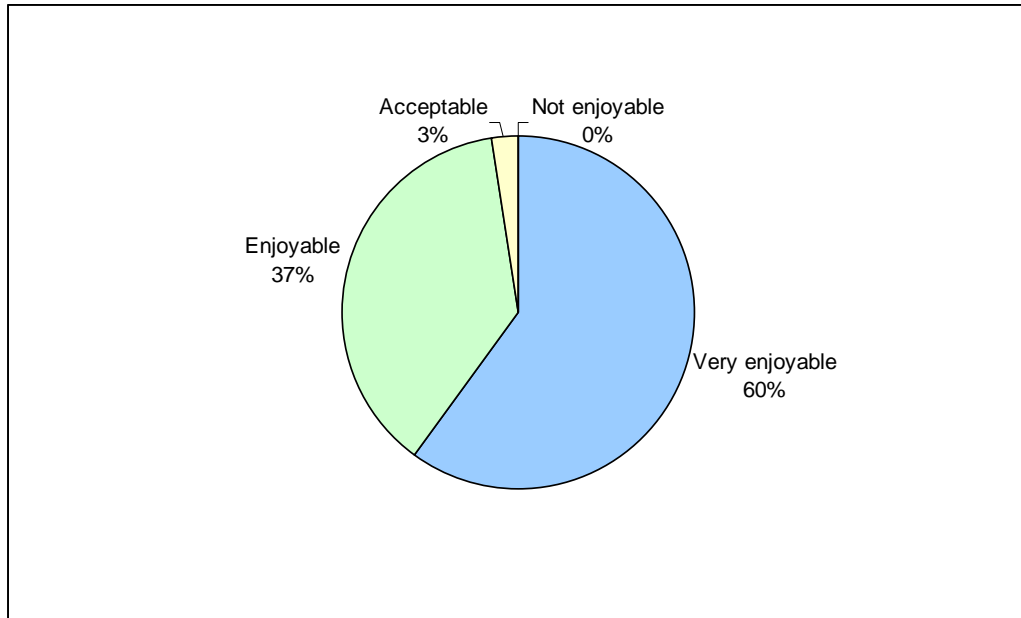
What was your main motivation for visiting the area? (Bournemouth/Dorset) (%)



The main motivations for visitors to Bournemouth were that they had visited the area before and liked it and the seaside, beaches and coast. The main motivations for visitors to DCC Dorset were seaside, beaches and coast and visiting friends and relatives.

Section 5: Rating of your trip to Dorset

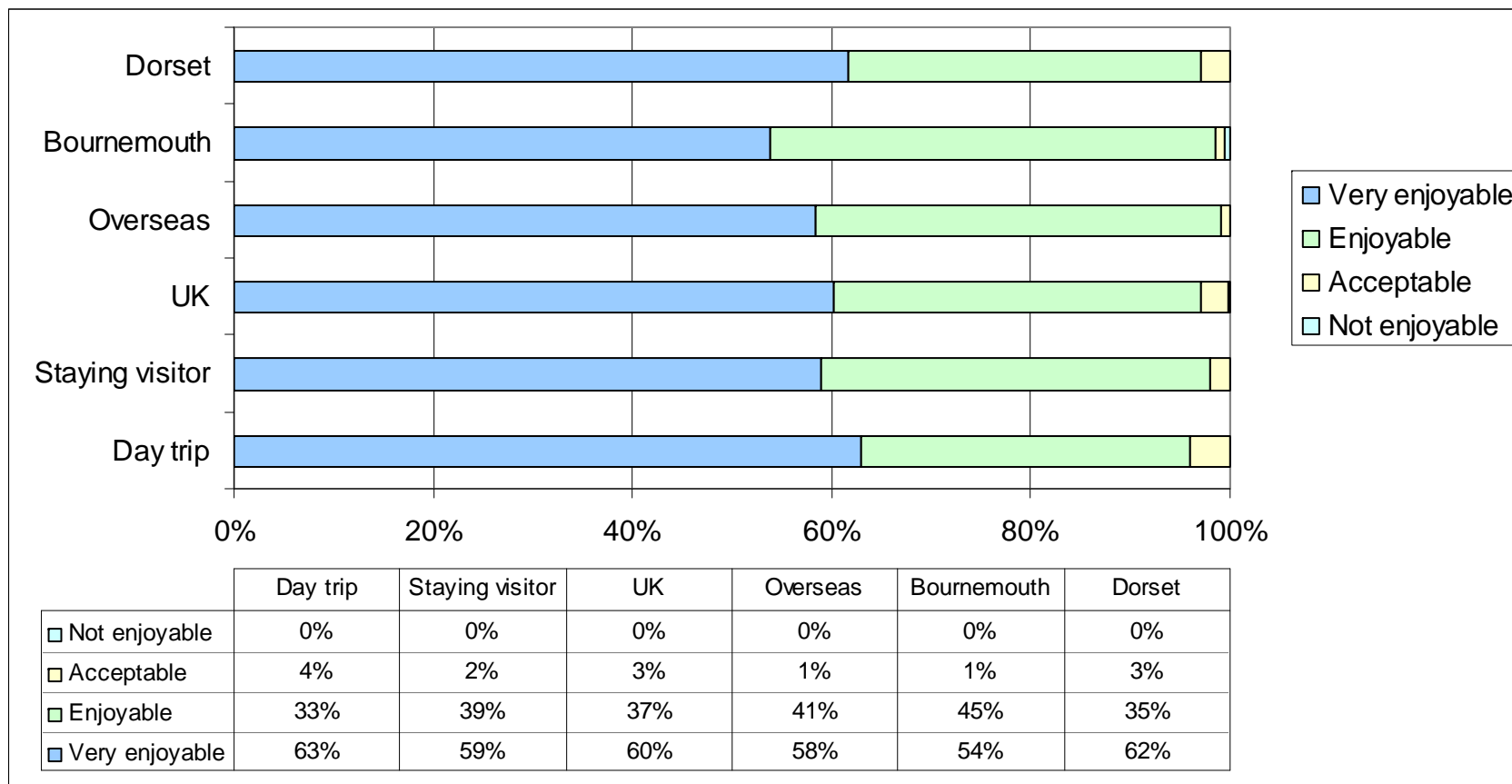
How would you rate the time you have spent here today? (%)



(Base: 987)

The vast majority of visitors (97%) had either a very enjoyable or enjoyable time.

How would you rate the time you have spent here today? (Dorset/Bournemouth), (Overseas/UK) and (day/stay) (%)



More visitors on a day trip to Dorset rated their time as very enjoyable compared to staying visitors. The percentage of visitors who rated their visit as very enjoyable was greater in Dorset (62%) than Bournemouth (54%)

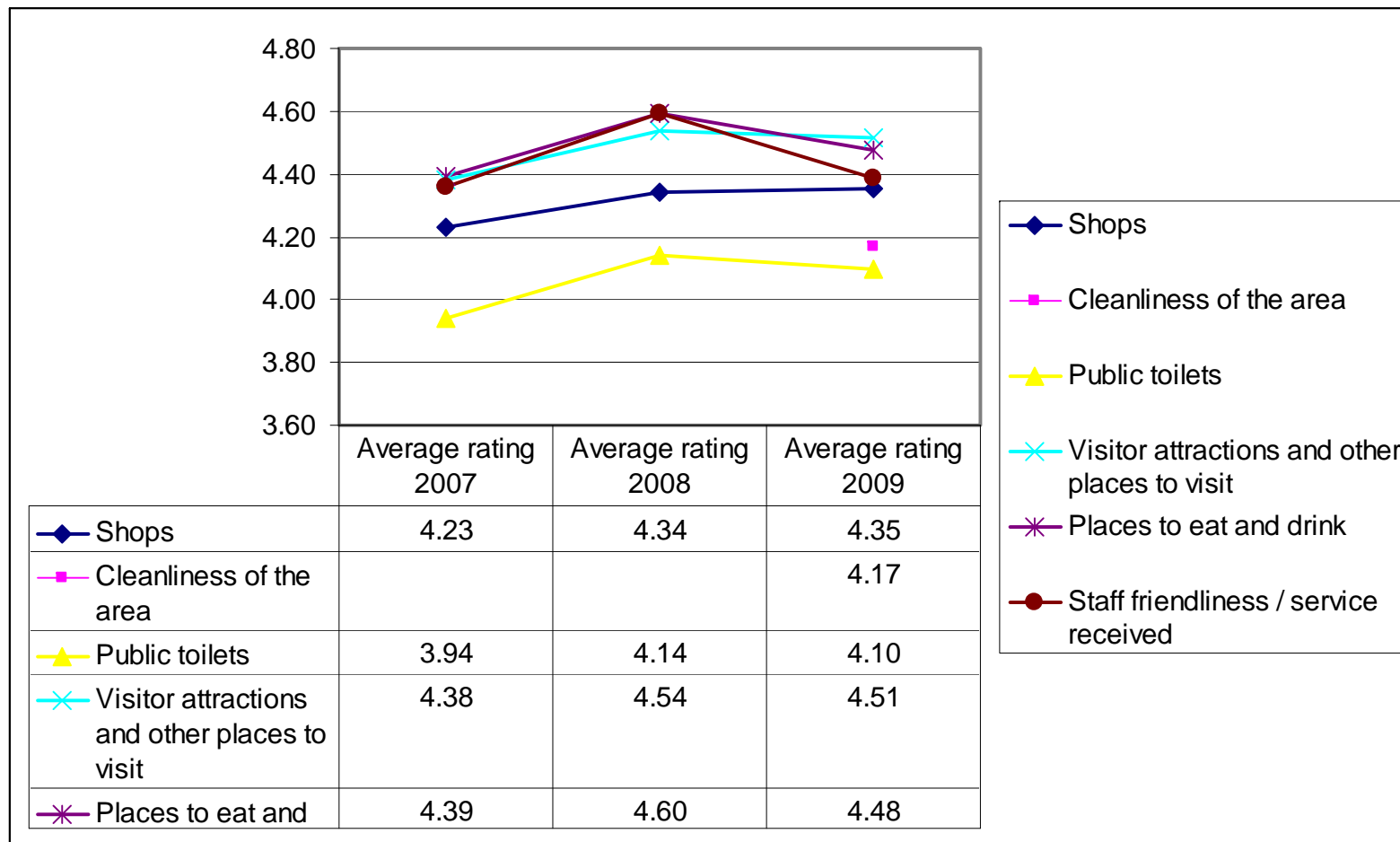
Services and entertainment

In this section where the mean scores for services and entertainment are provided the score is out of 5.

Please tell us how you would rate the following within the area

	Shops		Cleanliness of the area		Public toilets		Visitor attractions and other places to visit		Places to eat and drink		Staff friendliness / service received	
	<i>f</i>	%	<i>f</i>	%	<i>f</i>	%	<i>f</i>	%	<i>f</i>	%	<i>f</i>	%
Very Good	368	38	319	33	235	24	464	48	493	51	381	40
Good	472	48	521	53	544	56	387	40	362	37	535	56
Neither good nor poor	43	4	111	11	108	11	14	1	52	5	16	2
Poor	3	0	17	2	16	2	2	0	3	0	1	0
Very poor	2	0	3	0	2	0	0	0	0	0	0	0
Didn't use	91	10	4	0	68	7	101	10	58	6	18	2
Total	979	100	975	100	973	100	968	99	968	99	951	100

The majority of visitors rate all services and entertainment provided in the area as very good or good.



With the exception of shops, which have seen a slight increase in the average rating from 2008, the ratings given to all other services have declined slightly but are still higher than the average ratings from 2007.

Visitor Information Centres

Please tell us how you would rate the following within the area

	Staff friendliness at the TIC			Range of information at the TIC		
	<i>f</i>	%	% of used	<i>f</i>	%	% of used
Very Good	178	18	37	306	31	61
Good	277	28	58	165	17	33
Neither good nor poor	19	2	4	19	2	4
Poor	4	0	1	11	1	2
Very poor	0	0	0	2	0	0
Didn't use	502	51		480	49	
Total	980	99		983	100	

The majority of visitors who had used the Tourist Information Centres rated them as very good or good. The average rating has declined slightly since 2008.

Average rating since 2007

	Staff friendliness at the TIC	Range of information at the TIC
Average rating 2007	4.49	4.60
Average rating 2008	4.47	4.60
Average rating 2009	4.32	4.51

Car parking

Please tell us how you would rate the following within the area

	Availability of car parking			Cost of car parking		
	f	%	% of actual	f	%	% of actual
Very Good	151	16	20	75	8	10
Good	499	52	68	418	44	57
Neither good nor poor	45	5	6	155	16	21
Poor	29	3	4	69	7	9
Very poor	13	1	2	16	2	2
Didn't use	226	24		224	23	
Total	963	100		957	100	

88% of visitors who have used car parking in Dorset rated the availability as either very good or good. 67% rated the cost of car parking as either very good or good.

The average ratings for car parking have dropped slightly since 2008.

	Availability of car parking	Cost of car parking
Average rating 2007	4.08	3.34
Average rating 2008	4.27	3.70
Average rating 2009	4.01	3.64

Tourist information

	Provision of tourist information boards		Signposting to towns and villages		Signposting to visitor attractions		Pedestrian signposting within towns	
	<i>f</i>	%	<i>f</i>	%	<i>f</i>	%	<i>f</i>	%
Very Good	368	38	203	21	429	44	378	39
Good	447	46	588	61	432	45	473	49
Neither good nor poor	8	1	76	8	6	1	10	1
Poor	5	1	10	1	3	0	5	1
Very poor	0	0	0	0	0	0	0	0
Don't know	144	15	95	10	99	10	98	10
Total	972	101	972	101	969	100	964	100

	Provision of tourist information boards	Signposting to towns and villages	Signposting to visitor attractions	Pedestrian signposting within towns
Average rating 2007	4.03	4.32	4.14	4.30
Average rating 2008	4.07	4.47	4.35	4.32
Average rating 2009	4.12	4.48	4.41	3.92

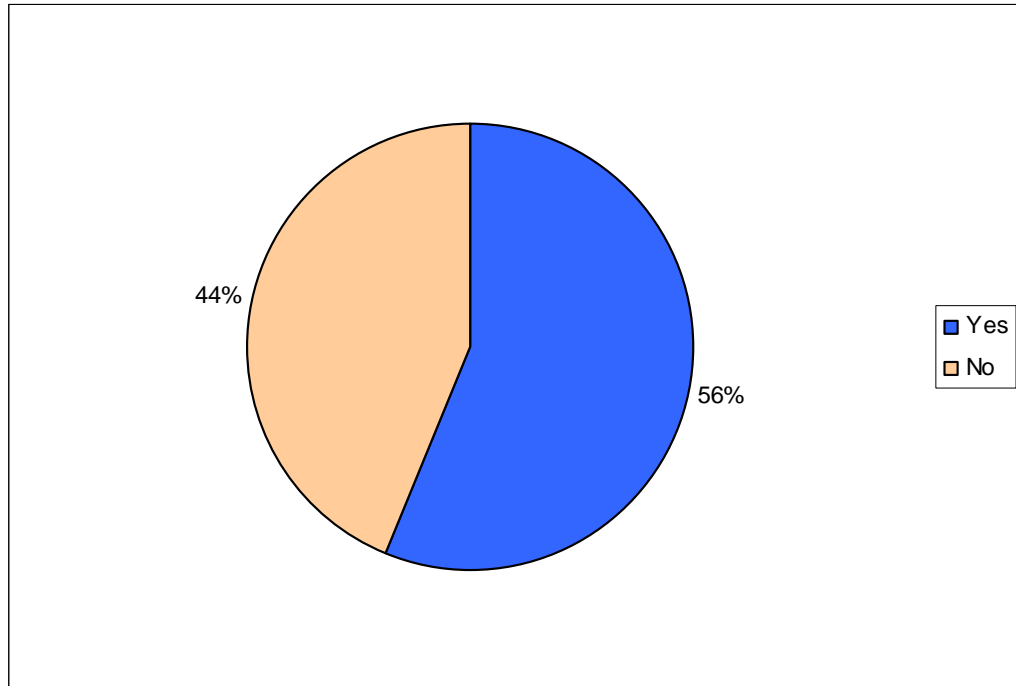
The average rating for provision of tourist information boards in towns, signposting to towns and villages and signposting to visitor attractions has slightly increased since 2008. The rating for pedestrian signposting in town has slightly decreased

Section 6: Accommodation

This section only includes the views of staying visitors staying in Dorset.

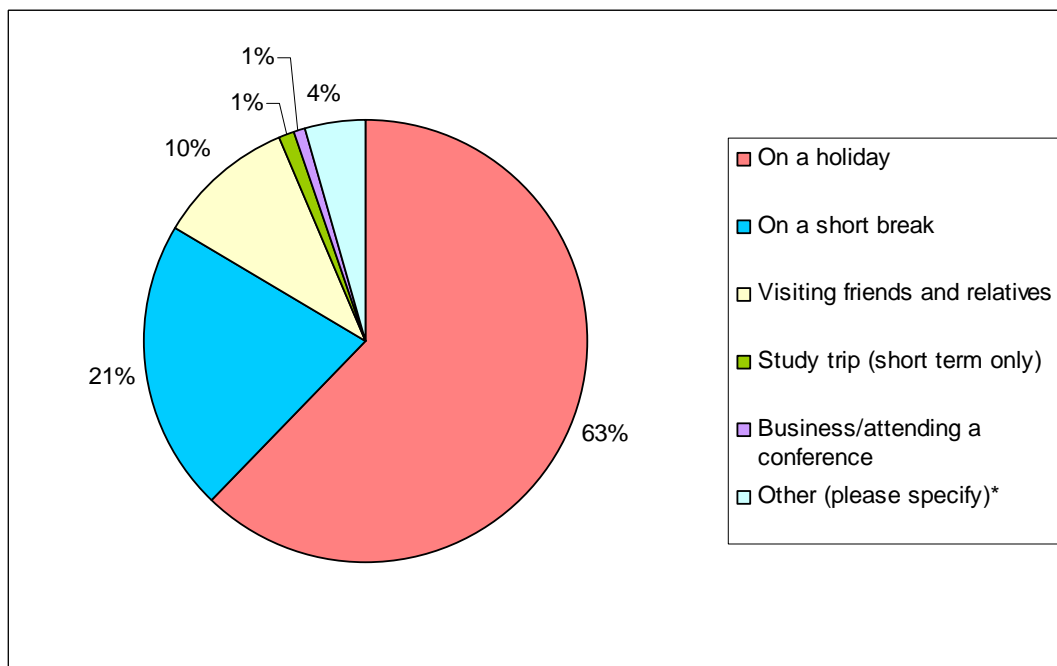
Of staying visitors to Dorset 56% were on their main holiday for the year. 63% were on a holiday of 3 or more nights, 21% were on a short break and 10% were visiting friends.

Is this your main holiday this year?



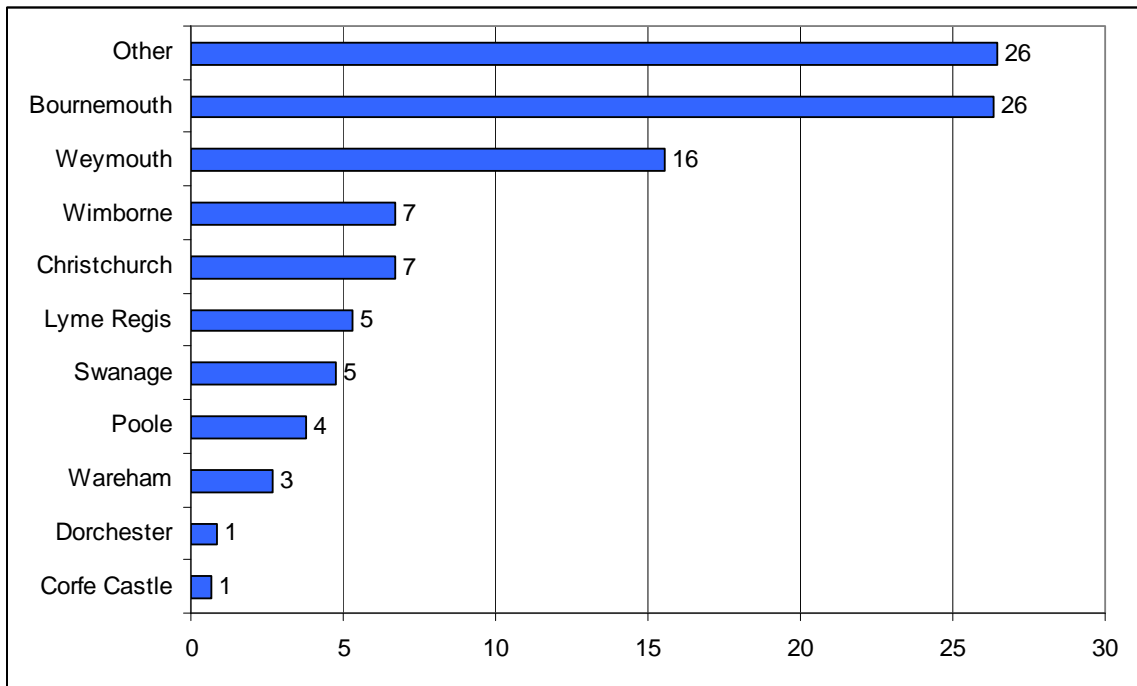
(Base: 709)

What type of Holiday are you on currently?



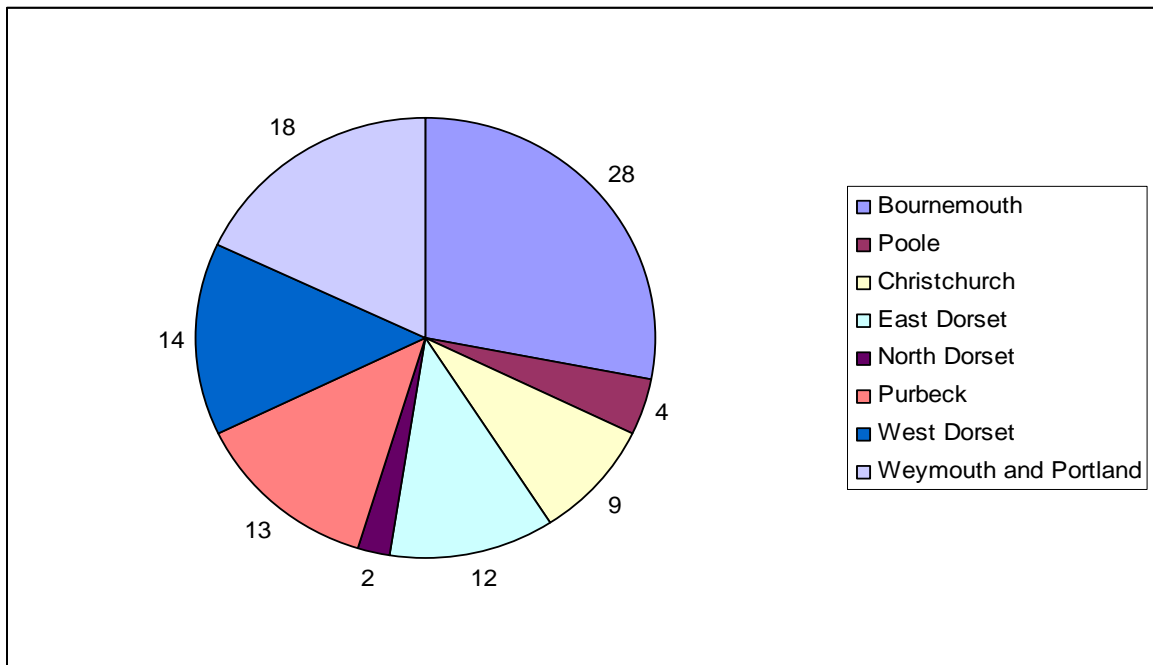
(Base: 707)

Where are you staying at present (%)



(Base: 714)

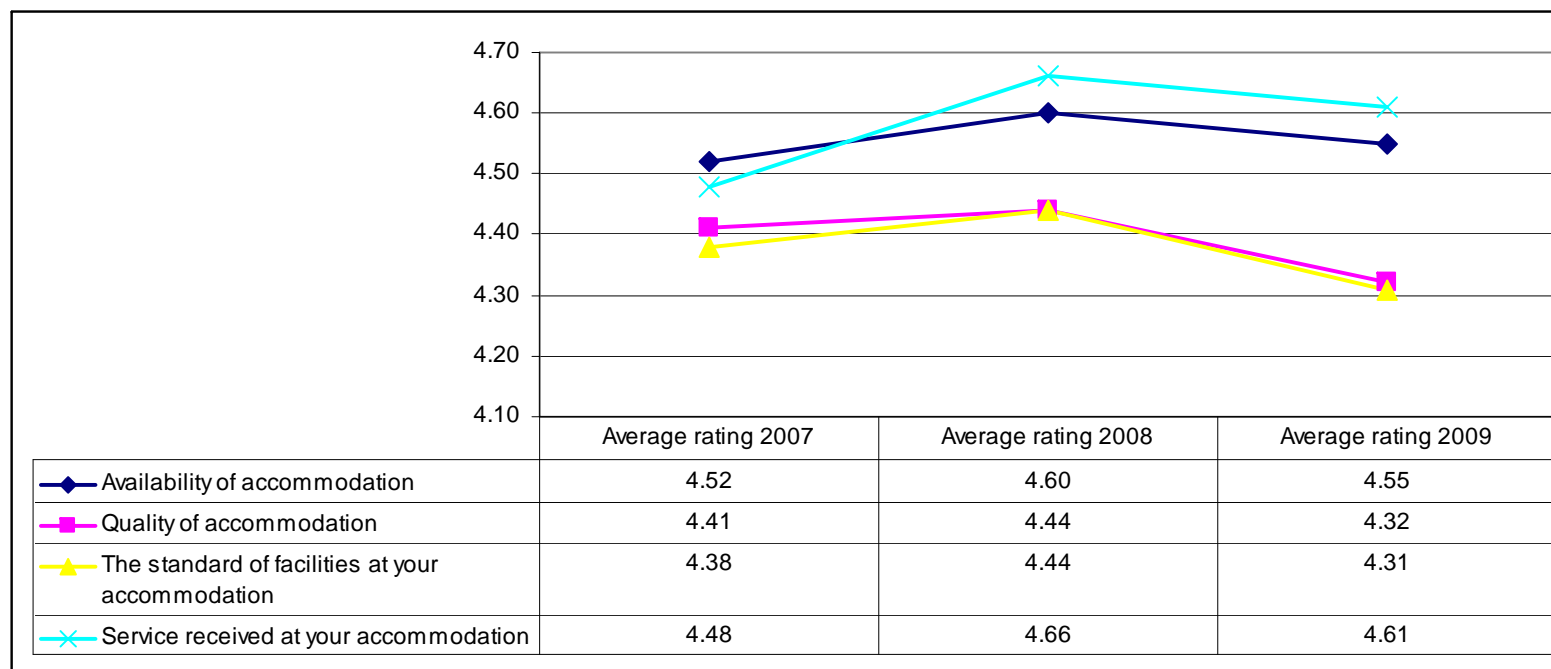
District area where staying visitors are staying (%)



(Base: 763)

How would you rate your accommodation in relation to the following aspect?

	Availability of accommodation		Quality of accommodation		The standard of facilities at your accommodation		Service received at your accommodation	
	<i>f</i>	%	<i>f</i>	%	<i>f</i>	%	<i>f</i>	%
Very Good	419	61	283	42	279	41	441	66
Good	241	35	347	51	340	50	204	30
Neither good nor poor	15	2	35	5	48	7	21	3
Poor	10	2	8	1	5	1	5	1
Very poor	2	0	4	1	3	0	1	0
Total	687	100	677	100	675	99	672	100



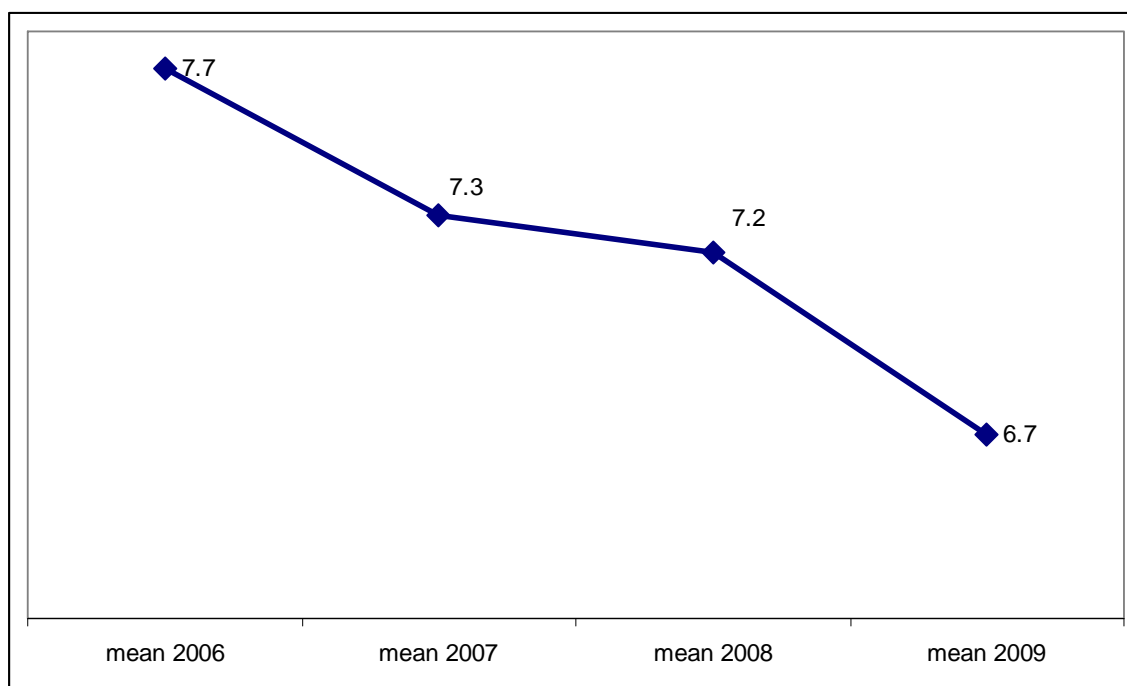
Accommodation rating: The vast majority of staying visitors rated all aspects of accommodation as either very good or good. The average rating for all aspects of accommodation has dropped slightly since 2008.

The standard of facilities at your accommodation and quality of accommodation has dropped slightly lower than the average scores recorded in 2007.

Number of nights in the area: The average number of nights those staying spent in the Dorset area overall is 6.7. Visitors to Bournemouth are likely to spend a fewer number of nights in the area than visitors to the county council area of Dorset.

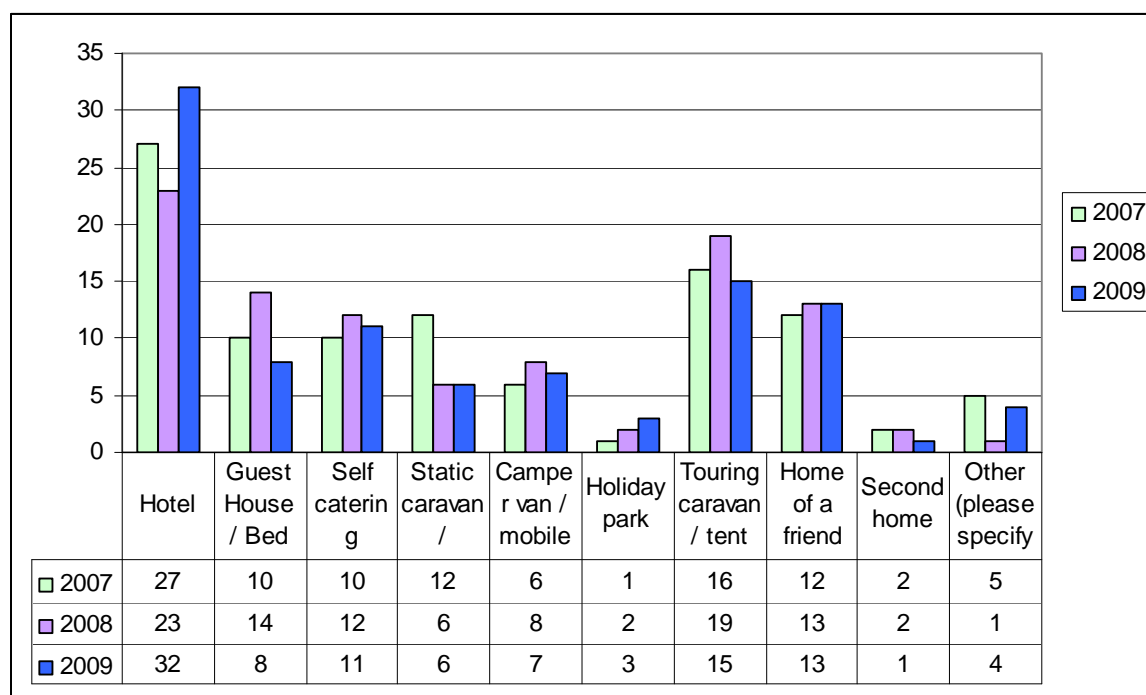
How many nights do you intend to spend in the area?				
	N	Minimum	Maximum	Mean
All Dorset visitors	732	1	35	6.73
	732			
Bournemouth	154	1	21	5.68
West Dorset	131	1	30	6.66
Christchurch	114	1	33	7.15
Purbeck	116	2	17	6.86
East Dorset	99	1	30	7.73
Weymouth and Portland	113	1	35	6.65

How many nights have you spent in the area (average since 2006)



Since 2006 there has been a steady decline in the number of nights spent in the area.

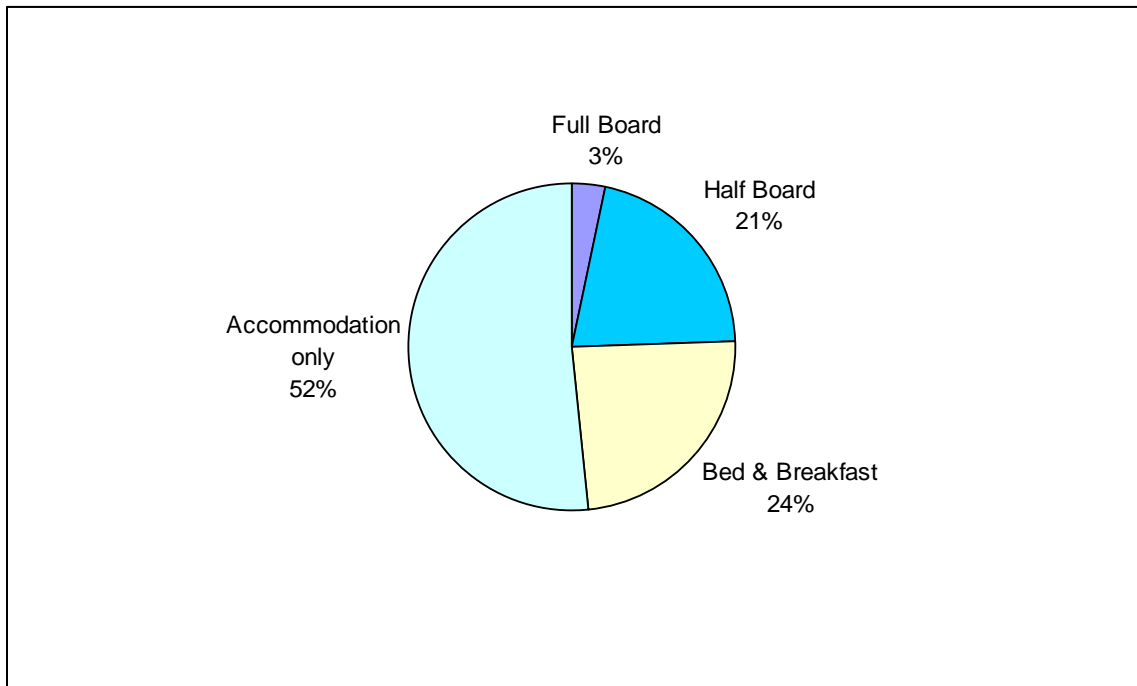
What sort of accommodation are you staying in? (%)



(Base 2009: 693)

The percentage of visitors staying in hotels and touring holiday parks has increased since 2008. The percentage of visitors staying in static caravans and a home of a friend or relative has remained the same since 2008. All other types of accommodation have seen a decrease in the number of visitors staying. The biggest decline (4%) was seen by guest houses and bed and breakfasts.

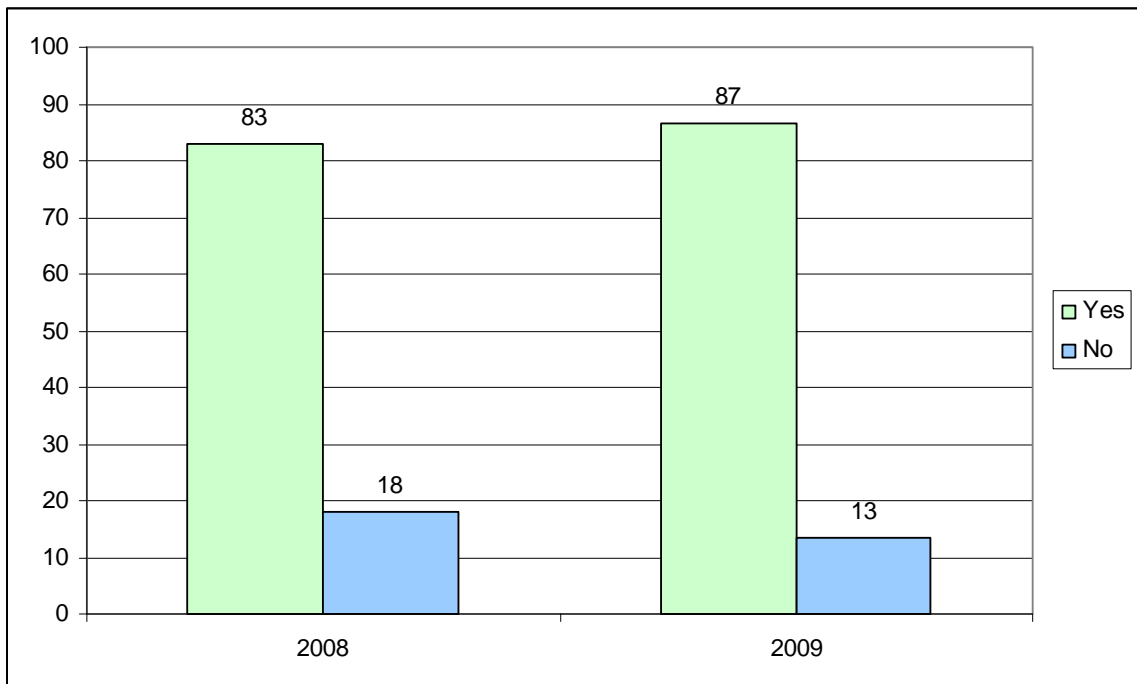
Is your accommodation...? (%)



(Base: 587)

Just over half of staying visitors were staying in accommodation where meals were not included.

Did you book your accommodation in advance? (%)

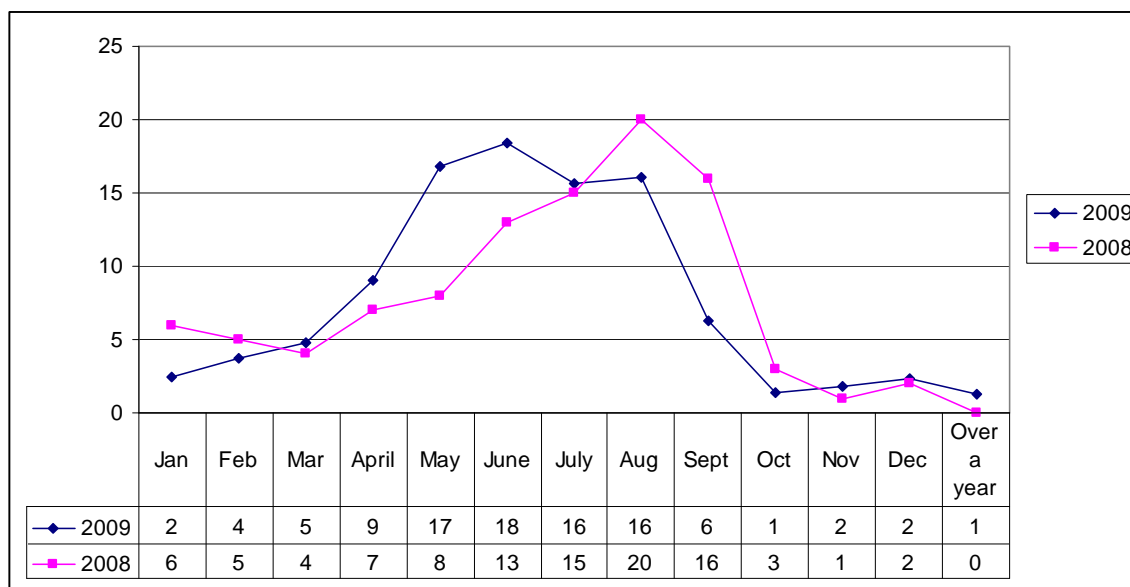


(Base: 541)

The percentage of visitors booking their accommodation in advance has increased by 4% since last year.

Month of accommodation booking

Which month did you book your accommodation in? (%)



(Base: 505)

More respondents in 2009 booked their accommodation in June than any other month. Visitors booked their accommodation slightly earlier this year compared to 2008.

If we correlate the month of booking accommodation to the date the survey was undertaken we can get an indication how far in advance visitors are booking their accommodation. From the table below we can see that 54% of visitors book their accommodation between 0 – 3 months before.

How far in advance do visitors book their accommodation?		
	<i>f</i>	%
Same month	69	14
1 month before	102	21
2 months before	94	19
3 months before	75	15
4 months before	50	10
5 months before	25	5
6 months before	20	4
7 months before	18	4
8 months before	9	2
9 months before	8	2
10 months before	9	2
11 months before	10	2
12 months before	6	1
Total	495	100

Section 7: Expenditure

Visitors were asked how much their group spent in total yesterday or how much their group expect to spend today.

Average spend per group (£)	
Food and Drink	£33.98
Entertainment and visitor attractions	£20.59
Other costs	£15.35

Average Day Visitor Spend (£)	
Food and Drink	£27.17
Entertainment and visitor attractions	£17.09
Other costs	£16.77

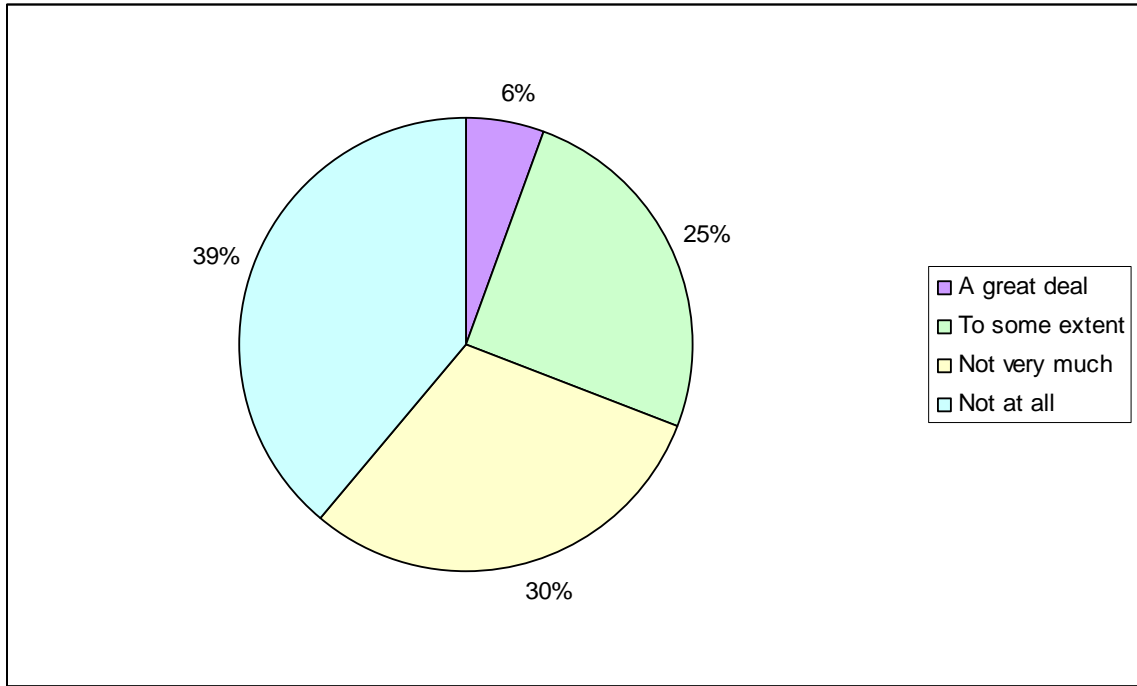
Average Staying Visitor Spend (£)	
Food and Drink	£35.88
Entertainment and visitor attractions	£21.19
Other costs	£14..98

This question was asked differently last year so a direct comparison cannot be made.

Average cost 2008 (£)	
Food and Drink	£26.35
Entertainment and visitor attractions	£19.63
Other costs	£18.30

**please note these have been recalculated to bring them in line with 2009 questions. Please use this as indicative only.

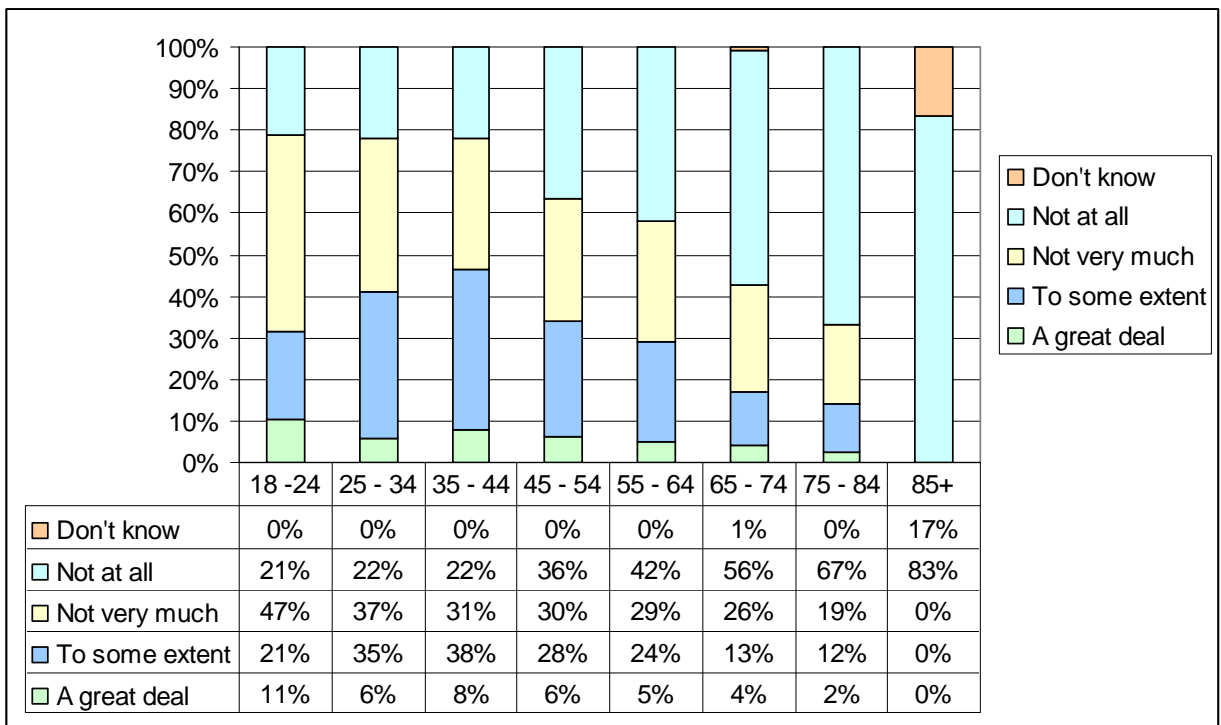
To what extent has the credit crunch affected your holiday plans?



(Base: 977)

For the majority of visitors the credit crunch had little or no affect on their holiday plans for the year. A quarter said it had an affect to some extent and 6% said it had a great deal of affect on their plans.

To what extent has the credit crunch affected your holiday plans? (by age group)



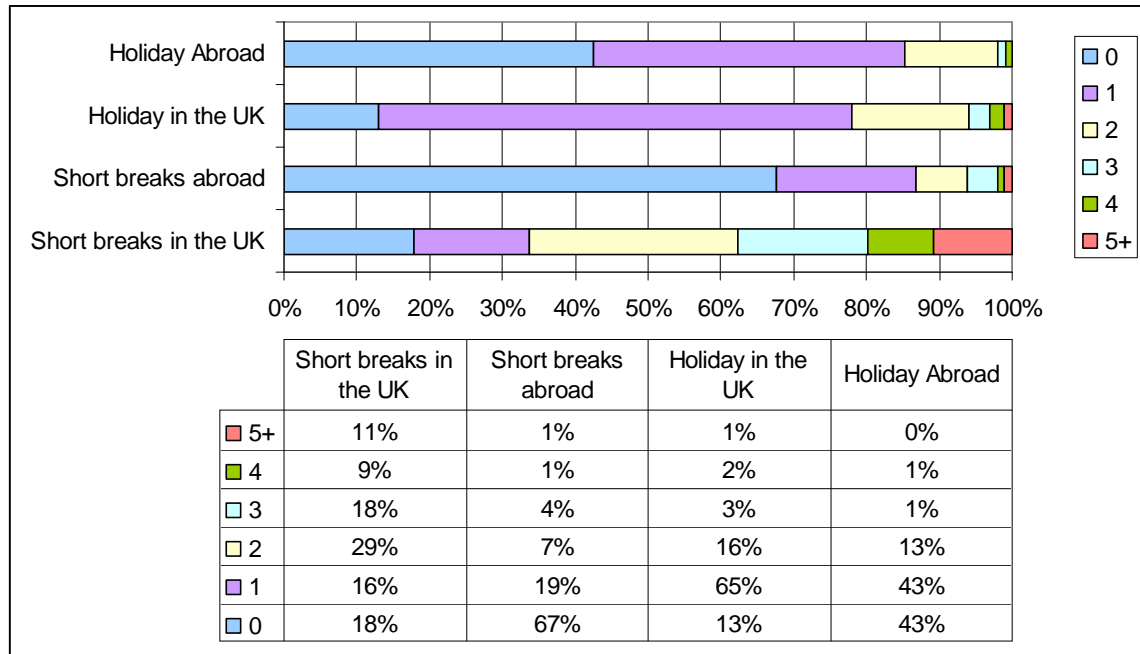
** Please note some age groups (85+ and 18 – 24) have a small sample so results should be indicative only.

The chart above shows that the credit crunch has had more of an affect on holiday plans for visitor's aged 18 – 44 and less of an affect on visitors aged 65+.

Section 8: Visitor profile

Visitors were asked how many holidays and short breaks abroad or in the UK they intend to have in 2009. 82% of visitors will take at least one short break in the UK, 33% will be taking at least one short break abroad, 87% will take at least one holiday in the UK and 57% intend to take at least one holiday abroad in 2009.

How many holidays/short breaks have you/will you be having in the UK and abroad in 2009? (%)



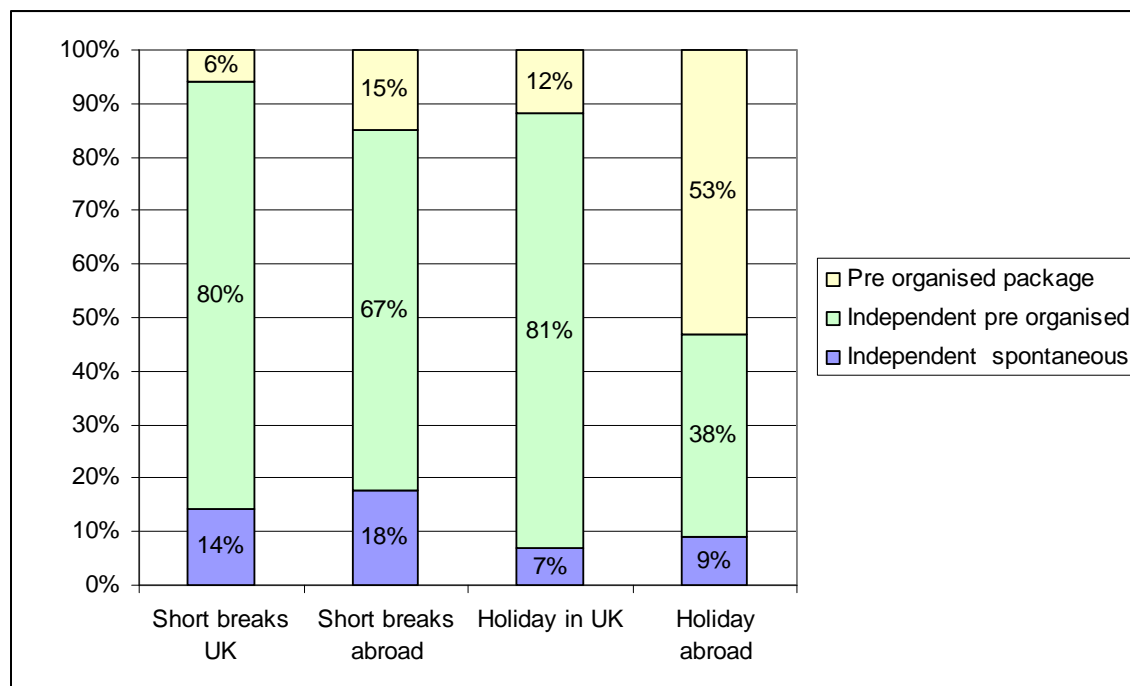
(Base Holiday abroad: 929)

(Base Holiday UK: 974)

(Base Short break abroad: 762)

(Base Short break UK: 942)

When choosing specific breaks/holidays do you prefer to independently organise your trip or prefer a package type break/holiday? (%)



(Base Holiday abroad: 611)

(Base Holiday UK: 880)

(Base Short break abroad: 359)

(Base Short break UK: 733)

When visitors are choosing their short breaks abroad or in the UK or holidays in the UK the majority of them independently pre organise their trip before they travel. When choosing a holiday abroad just over half (53%) choose a pre organised package for their holiday. Visitors taking short breaks are more likely to act spontaneously in regards to their booking than visitors choosing a holiday.

Holiday brand and product

Please indicate the extent to which you are prepared to pay more for the following characteristics of a service or holiday product. 0 means that you would not be prepared to pay any more, whilst 10 means you would definitely be prepared to pay more.				
	N	Minimum	Maximum	Mean
For brands that express my individuality	996	0	10	5.78
To be given individual attention	1002	0	10	6.41
For something that is out of the ordinary	1002	0	10	8.03
For products that use the most advanced technology	999	0	10	4.29
For a fashionable brand	990	0	10	4.71
To get better service	988	0	10	6.96
For a product or service that is new to the market	982	0	10	5.00

Visitors were asked to indicate whether they would pay any more for certain characteristics of a holiday service or product. From the table above we can see that to some extent visitors to Dorset are prepared to pay more for,

- Something that is out of the ordinary,
- To get a better service
- To be given individual attention

They are less likely to pay more for,

- Products that use the most advanced technology
- A fashionable brand

Different people have different views about themselves. Please tell me the extent to which you agree or disagree with each statement on a scale 0 – 10 (0 disagree 10 agree)

	N	Minimum	Maximum	Mean
I like to try things which are unusual	977	0	10	6.98
I like to try things that are new to me	975	0	10	7.08
I am happy to do my own thing regardless of what others might think	973	0	10	7.66
I am prepared to take risks in order to get the most out of life	972	0	10	6.11
I find it easy to justify buying expensive alternatives	966	0	10	3.92
I like strong intellectual challenges	954	0	10	6.69
Arts and culture are an important part of who I am	949	0	10	6.69
I have a fond liking for things that others might describe as old fashioned	931	0	10	7.33
Function is more important than style	899	0	10	7.08

The statements which Dorset visitors agree with the most are,

- I am happy to do my own thing regardless of what others might think,
- I have a fond liking for things that others might describe as old fashioned
- Function is more important than style
- I like to try things that are new to me

The statements which Dorset visitors are less likely to agree with are,

- I find it easy to justify buying expensive alternatives

Visitor segmentation

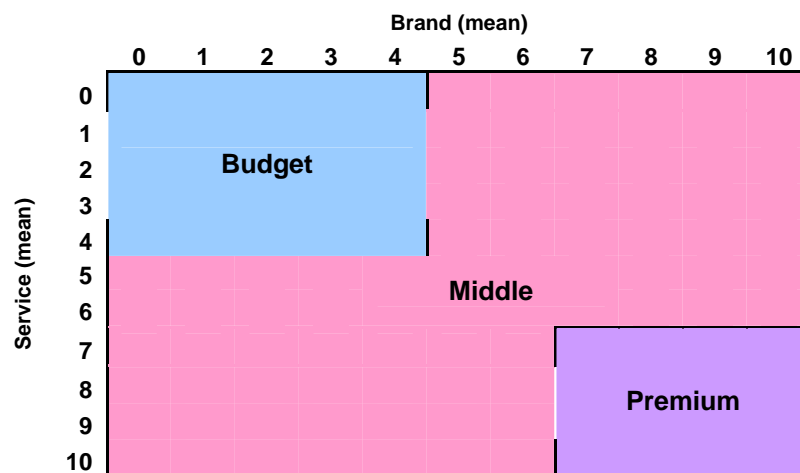
Visitor segmentation is driven by three key areas - family, motivation and financial orientation. The family factor is driven by responses to Q41 with those respondents noting that they had children being classed as a family.

Family	Adult
Family with children	One adult
Other adults with children	Two adults
	Adults only

The motivation factor is driven by Q16 (what was your main motivation for visiting the area). Responses to this question were divided into two options, internal (visitors motivated by their own internal desires) and external (visitors motivated specifically by the destinations' facilities/provision).

Internal	External
Visit the area before and liked it.	Seaside, beaches, coast.
Visiting friends and relatives.	Scenery, countryside, natural history.
Wanted to go somewhere not been before.	Local visitor attractions
Recommended by friends and relatives.	Good shopping facilities.
Easy to get to.	Cultural, heritage or literary.
Peace and quiet.	Sporting activities.
Try local food.	An event or festival
	World heritage site.

The financial orientation factor was driven by Q10 (Please indicate the extent to which you are prepared to pay more for the following characteristics of a service or holiday product) Questions within Q10 were divided into brand and service and a mean score for each calculated.



Budget = Brand <= 4 and Service <= 4
Middle = (Brand > 4 and Brand <= 6) or (Service > 4 and Service <= 6)
Premium = Brand > 6 and Service > 6

When analysing these three groups against each other seven profile groups emerge from the Dorset visitor data.

These three areas (family, motivation and financial orientation) were then used to calculate appropriate segments)

Segment	Structure		
	Family	Motivation	Financial Orientation
1	Family	Internal	Middle/Premium
2	Family	External	Middle/Premium
3	Family		Budget
4	Adult	Internal	Middle
5	Adult	External	Middle
6	Adult		Budget
7	Adult		Premium

Segment 1: are visitors in a family who are motivated by internal desires with a middle or premium brand and service identity.

Segment 2: are visitors in a family who are motivated by Dorset as a destination with a middle or premium brand and service identity.

Segment 3: are visitors in a family motivated by either their own internal desires or by Dorset as a destination with a budget brand and service identity.

Segment 4: are visitors in a group of adults, motivated by internal desires with a middle brand and service identity.

Segment 5: are visitors in a group of adults, motivated by Dorset as a destination with a middle brand and service identity.

Segment 6: are visitors in a group of adults, motivated by either their own internal desires or by Dorset as a destination with a budget brand and service identity.

Segment 7: are visitors in a group of adults, motivated by either their own internal desires or by Dorset as a destination with a premium brand and service identity.

Visitor Survey segments

