



Information Technology in Dorset Tourism. 2005

Final Report

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Prepared By The Market Research Group (MRG), Bournemouth
University,
On Behalf Of
Dorset New Forest Tourism Partnership.

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1: Executive Summary

The 'Information Technology in Dorset Tourism, 2005' was conducted by The Market Research Group, on behalf of the DNFTP in late 2005. Information was sought from tourism businesses across all sectors within Dorset, from details provided by the County's eight local authorities. The section below provides a brief outline of the key responses given.

Headline Conclusions

- Computer usage in Dorset tourism businesses is commonplace. However, in general the level of usage is largely restricted to more basic tasks such as email or word processing.
- Internet usage is widespread, with broadband connection increasing at the expense of slower dial-up connection.
- Business internet presence has increased since 2004, with most businesses owning their own website and a significant proportion of the remainder taking part in collective/co-operative website schemes.
- Websites are primarily marketing tools, generating business for the majority of respondents, with little change in interactive functionality.
- Two thirds of tourism businesses have not received any IT training or support since July 2004, primarily (in the case of DNFTP courses) due to timing and location considerations.
- Internet Marketing and Website Design are the leading areas of received IT training.
- Generally, between one in five and one in four tourism businesses in Dorset would be interested in attending a specific course.
- Courses and software training related to the internet and website design and marketing, database marketing, and desktop publishing are the most sought after.

2: Introduction

2.1: Dorset New Forest Tourism Partnership (DNFTP)

Dorset New Forest Tourism Partnership was formed in 1995 to provide a single umbrella body for the co-ordination and development of tourism in Dorset and the New Forest, to the benefit of the visitor, local economy, community and the environment. It is supported by and works alongside local authorities, business and trade organisations and the regional tourist boards.

2.2: The Market Research Group (MRG)

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

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.

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.

3: Methodology

3.1: Target Population

For the 'Information Technology in Dorset Tourism, 2005' research the target population was defined as 'all tourism businesses within Dorset'. Contact details were provided by Dorset's eight District Councils and a representative sample of all tourism businesses in Dorset was sought.

3.2: Data Collection

Responses to the 'Information Technology in Dorset Tourism, 2005' research were collected using postal self-completion questionnaires. The advantage of using a self-completion format is that respondents are able to complete the questionnaire at their leisure, and look up information if necessary. This was also the only viable method, within the budget available that could be implemented over a geographically unclustered sample.

3.3: Data Analysis

The self-completion questionnaires were analysed using a standard coding system, where each response is assigned a numerical value for data analysis within a specialist computer programme. Tabulations and other statistics were then produced to satisfy the information requirements of the commissioning parties.

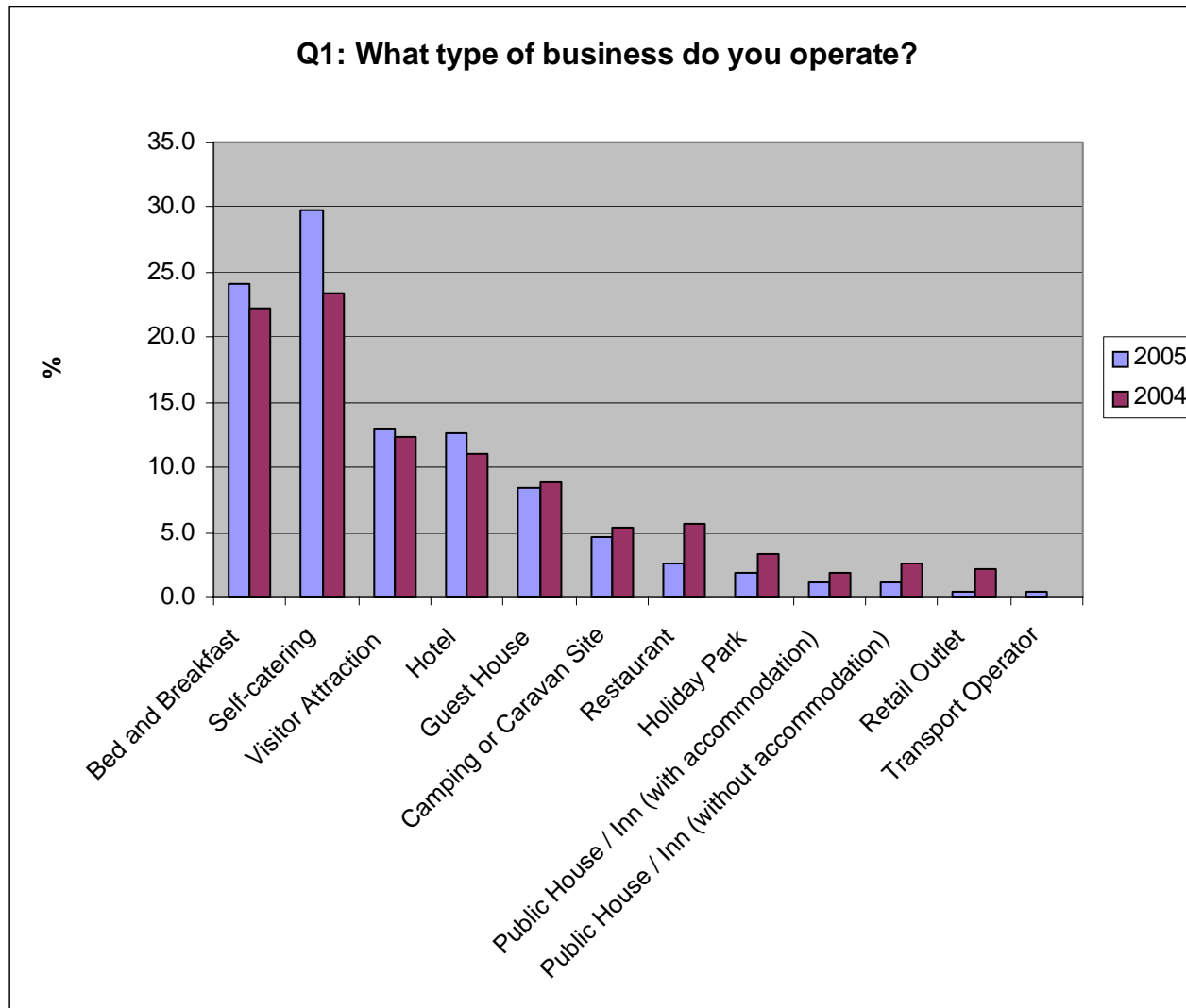
4: Survey Results

4.1: Business Profile

4.1.1: Business Type

The majority of respondents were from businesses within the accommodation sector (81% of all respondents), with self-catering establishments comprising 30% of the return, bed and breakfast 24% and hotels 13%. Visitor attractions comprised 13% of the sample. [tab. 1, fig. 1].

Table 1: (Q1) What type of business do you operate?				
		2005	2004	
	Frequency	Valid %	Valid %	% Change
Self-catering	78	29.8	23.4	6.4
Bed and Breakfast	63	24.0	22.2	1.8
Visitor Attraction	34	13.0	12.4	0.6
Hotel	33	12.6	11.0	1.6
Guest House	22	8.4	8.9	-0.5
Camping or Caravan Site	12	4.6	5.4	-0.8
Restaurant	7	2.7	5.6	-2.9
Holiday Park	5	1.9	3.3	-1.4
Public House / Inn (with accommodation)	3	1.1	1.9	-0.7
Public House / Inn (without accommodation)	3	1.1	2.6	-1.4
Retail Outlet	1	0.4	2.1	-1.7
Transport Operator	1	0.4	1.2	-0.8
Total	262	100.0	100.0	

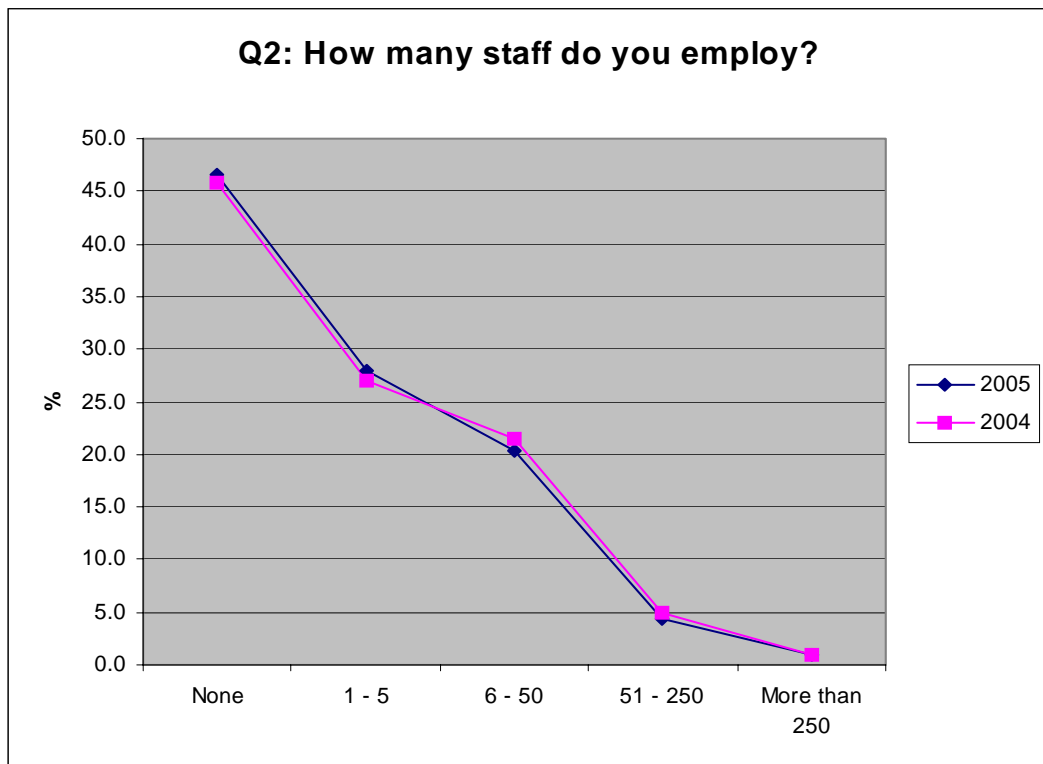


4.1.2: Employment

47% of businesses did not employ any staff. Almost one half of the sample, therefore, is comprised of sole traders or other self employed individuals. [tab. 2, fig. 2]

28% of all businesses employed between 1 and 5 staff, and 26% of businesses employed 5 members of staff or more. [tab. 2, fig. 2]

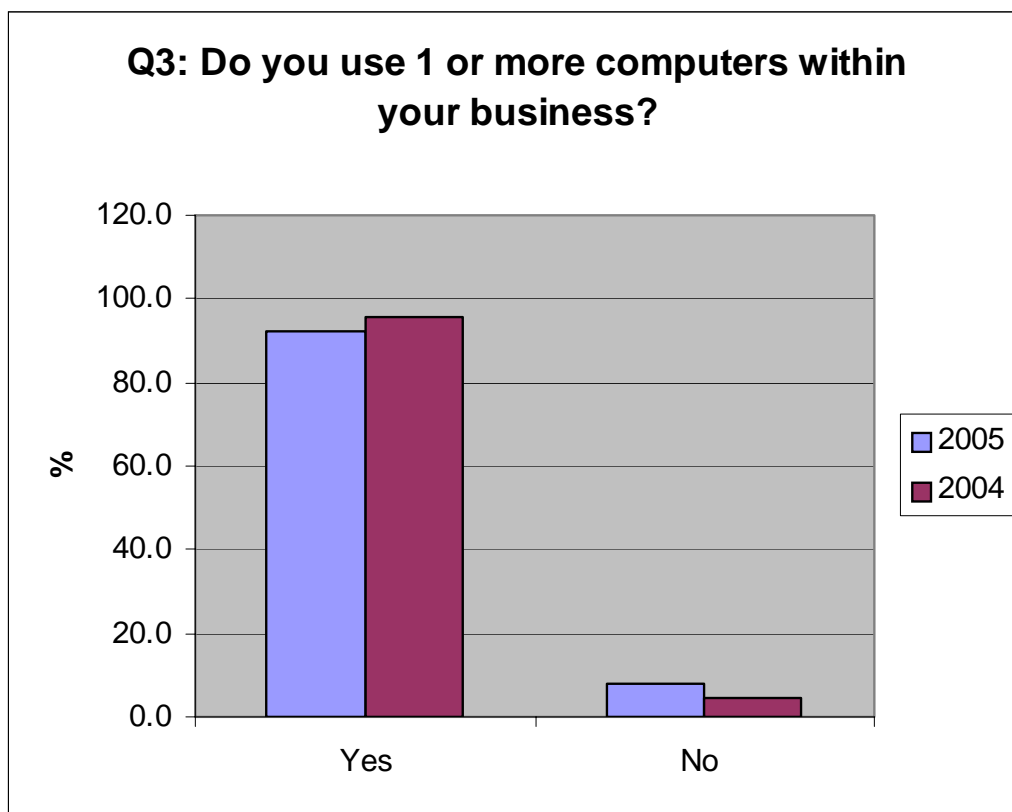
Table 2: (Q2) How many staff do you employ?				
		2005	2004	
	Frequency	Valid %	Valid %	% Change
None	140	46.5	45.8	0.7
1 - 5	84	27.9	27.0	0.9
6 - 50	61	20.3	21.4	-1.1
51 - 250	13	4.3	4.9	-0.6
More than 250	3	1.0	0.9	0.1
Total	301	100.0	100.0	



4.2: Computer Usage

The majority of respondents (92%) had computers within their business, although this figure reflects a slight fall in computer use compared to 2004. [tab. 3, fig. 3]

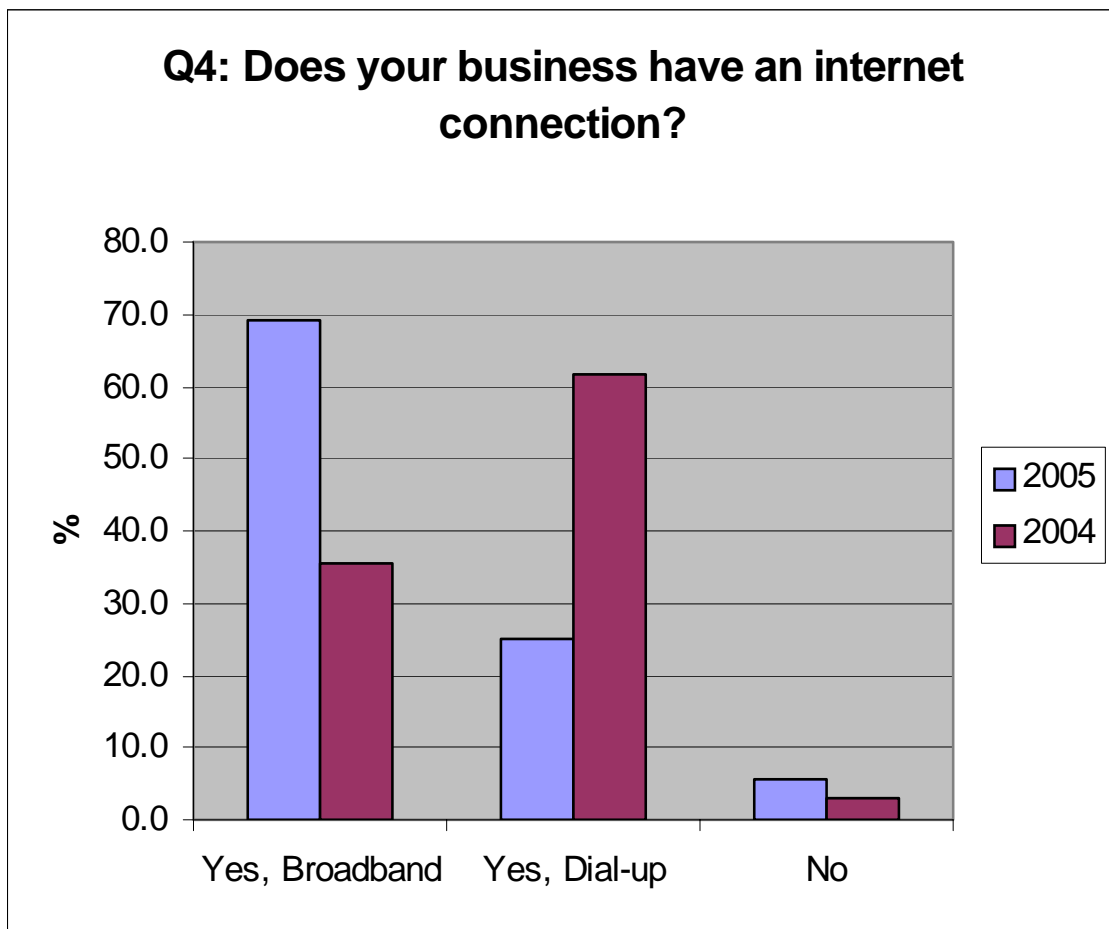
Table 3: (Q3) Do you use 1 or more computers within your business?				
		2005	2004	
	Frequency	Valid %	Valid %	% Change
Yes	268	92.1	95.7	-3.6
No	23	7.9	4.3	3.6
Total	291	100.0	100.0	



4.3: Internet Usage

97% of businesses using computers had an internet connection, compared to only 3% without. Of those respondents with an internet connection, the majority used broadband connection (69% of total computer users), rather than dial-up (25% of total computer users). Broadband connection has increased by 34% since 2004, at the expense of dial-up connection [tab. 4, fig. 4].

Table 4: (Q4) Does your business have an internet connection?				
		2005	2004	
	Frequency	Valid %	Valid %	% Change
Yes, Broadband	198	69.2	35.4	33.8
Yes, Dial-up	72	25.2	61.5	-36.3
No	16	5.6	3.1	2.5
Total	286	100.0	100.0	



4.4: Computer Activities

Word processing and email are the most prominent activities undertaken on computers in businesses responding to the survey, each being used by 91.5% of respondents. Browsing the internet was an activity conducted in over three quarters of responding businesses (76%); while 69% and 61% used computers to create menus/leaflets and manage accounts respectively. Computers were used for customer databases in 61% of businesses. Activities relating to website management and design were less frequently performed, occurring in 48% and 34% of businesses respectively. [tab. 5, fig. 5]

Table 5: (Q5) Which of the following activities do you use your computer for within your business?		
		2005
	Frequency	Valid %
Creating letters or other word processing	257	91.5
E-mail	257	91.5
Browsing the internet	213	75.8
Creating menus/leaflets	193	68.7
Managing accounts	172	61.2
Database of customers or similar	151	53.7
Website management	134	47.7
Website design	96	34.2



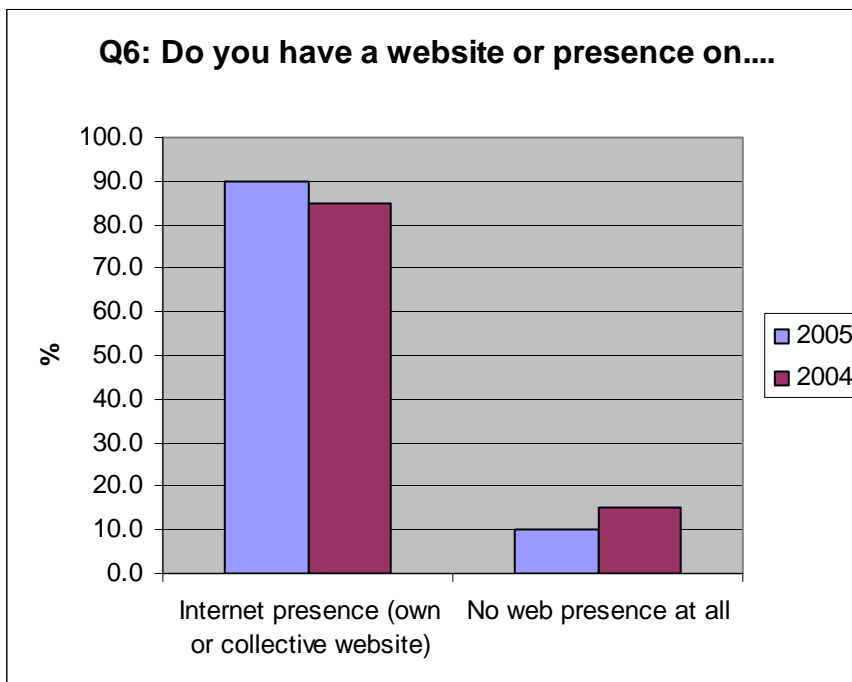
4.5: Internet Business Activities

4.5.1: Website Ownership

Almost three quarters (78%) of businesses responding to the survey had their own website, whilst web presence overall has increased by 5% since 2004. Only 10% of businesses had no internet presence, compared with 15% in 2004, reflecting the increased prevalence of business websites. [tab. 6, fig. 6]

Table 6: (Q6) Do you have a website or presence on....				
		2005	2004	
	Frequency	Valid %	Valid %	% Change
Internet presence (own or collective website)	270	90.0	85.0	5.0
No web presence at all	30	10.0	15.0	-5.0

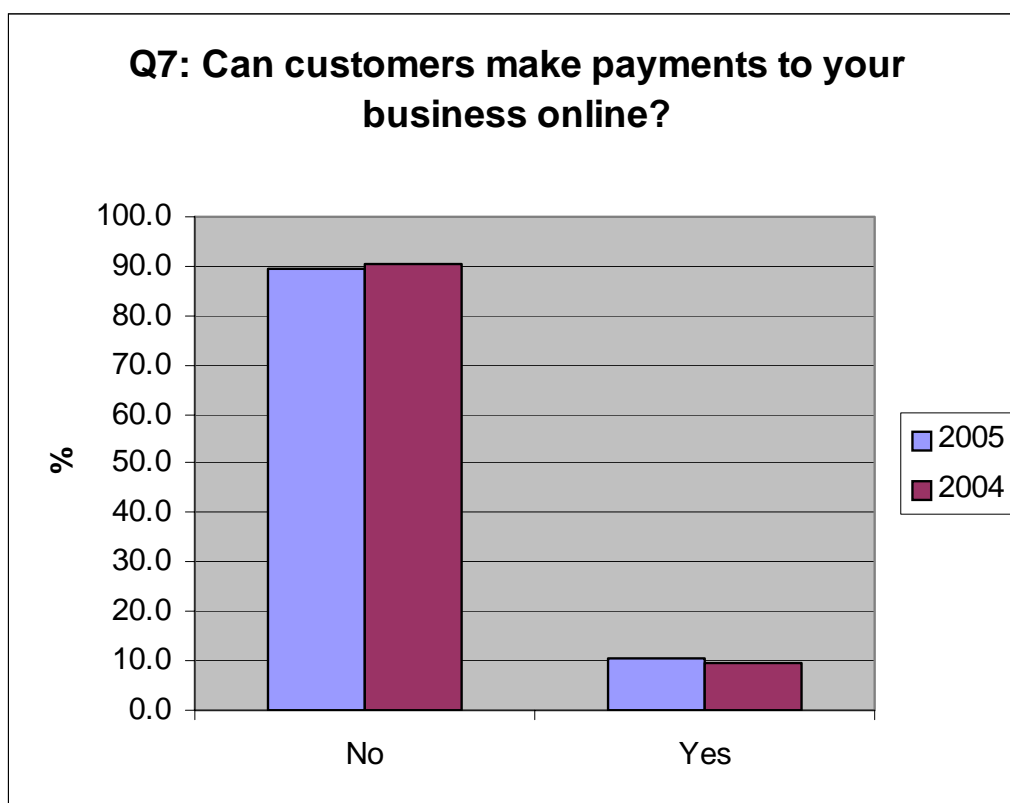
Table 6a: (Q6) Do you have a website or presence on....		
		2005
	Frequency	Valid %
Your own website	220	73.3
A collective/co-operative website	128	42.7
None	30	10.0



4.5.2: Online Payments

Customers could not make online payments to the majority of businesses (89%) responding to the survey. Only 11% of businesses were able to accept online payments. [tab. 7, fig. 7]

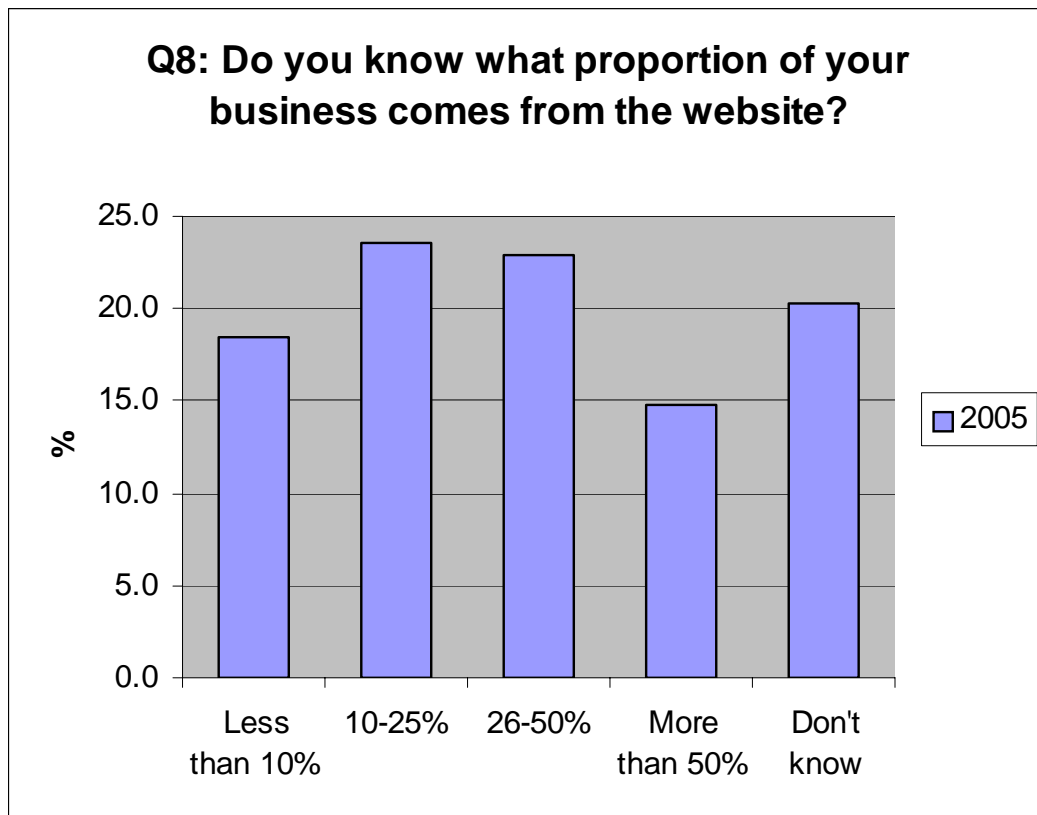
Table 7: (Q7) Can customers make payments to your business online?				
		2005	2004	
	Frequency	Valid %	Valid %	% Change
No	245	89.4	90.5	-1.1
Yes	29	10.6	9.5	1.1
Total	274	100.0	100.0	



4.5.3: Business Generation

The majority of respondents (80%) estimated that at least some proportion of their business came from their website, although 20% of respondents were unable to gauge the quantity. 19% of respondents estimated that less than 10% of their business came from their website, whilst a further 24% estimated 10-25%, and 23% estimated 26-50%. Only 15% claimed that over 50% of their business was generated by their website. [tab. 8, fig. 8]

Table 8: (Q8) Do you know what proportion of your business comes from the website?		
		2005
	Frequency	Valid %
Less than 10%	50	18.5
10-25%	64	23.6
26-50%	62	22.9
More than 50%	40	14.8
Don't know	55	20.3
Total	271	100.0

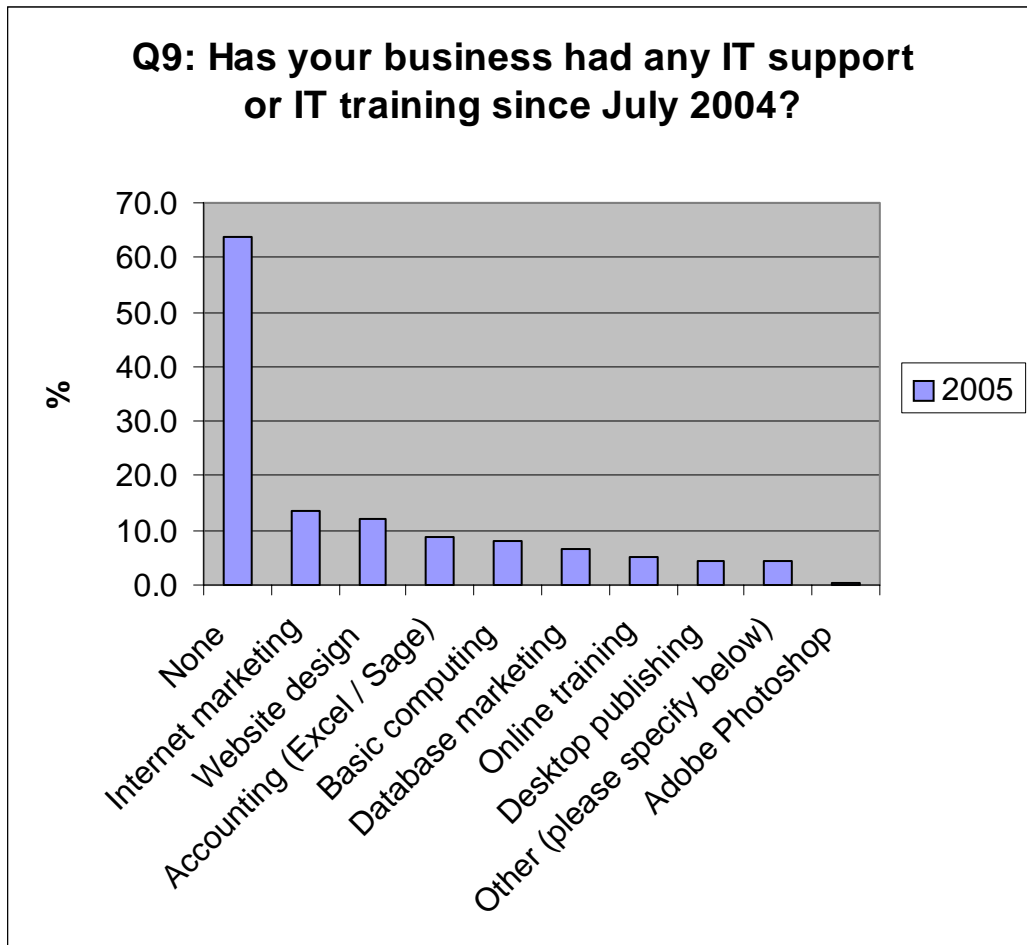


4.6: IT Training and Support

4.6.1: Support History

Most respondents (64%) had not received any IT support or undertaken any training since July 2004. Where training or support had occurred, it related primarily to internet marketing and website design (14% and 12% respectively), further reflecting the growth of internet activities mentioned previously. Accounting support/training had occurred in 9% of businesses, basic computing in 8%, and database marketing in 7%. 5% of respondents had conducted online training, whilst other areas of training/support were each sought by less than 5% of respondents. [tab. 9, fig. 9].

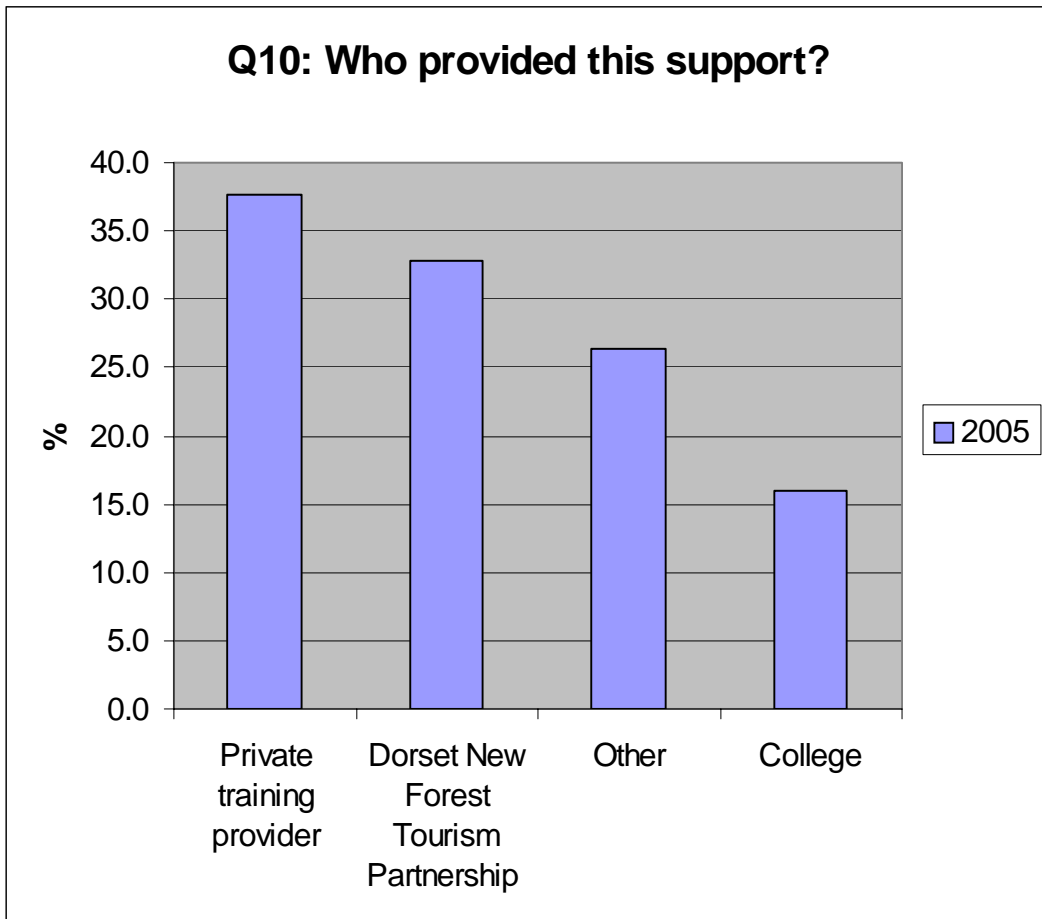
		2005
	Frequency	Valid %
None	170	63.7
Internet marketing	36	13.5
Website design	32	12.0
Accounting (Excel / Sage)	23	8.6
Basic computing	22	8.2
Database marketing	18	6.7
Online training	14	5.2
Desktop publishing	12	4.5
Other (please specify below)	12	4.5
Adobe Photoshop	1	0.4



4.6.2: Support/Training Sources

Support and training, where sought, came from private training providers in 38% of cases, from the Dorset New Forest Tourism Partnership in 33% of cases, and from other sources in 26% of cases. Only 16% of businesses received training/support from a college [tab.10, fig. 10].

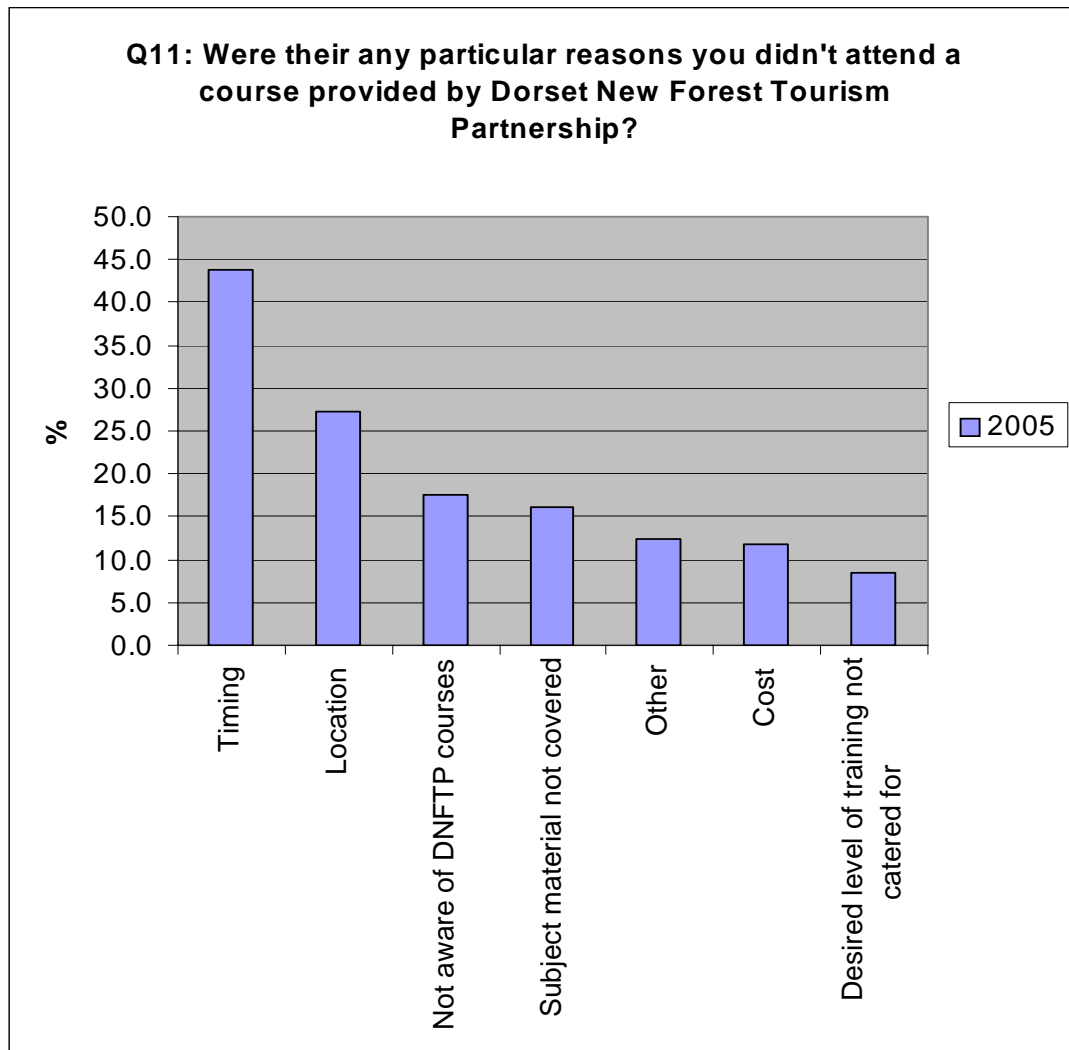
Table 10: (Q10) Who provided this support?		
		2005
	Frequency	Valid %
Private training provider	47	37.6
Dorset New Forest Tourism Partnership	41	32.8
Other	33	26.4
College	20	16.0



4.6.3: Prohibitive Factors

While the majority of respondents had not received any IT support or training since July 2004 [tab. 9, fig. 9], reasons given for not attending courses provided by Dorset New Forest Tourism Partnership were varied, but were predominantly related either to timing or location. Almost half the respondents (44%) suggested that the timing of the courses was the main factor in not attending, whilst 27% could not attend because of the location. 18% of respondents were not aware of DNFTP courses, and 16% suggested that the subject material that they were interested in was not covered. Other reasons were suggested by 12%, whereas cost and insufficient level of qualification was the reason in 12% and 9% of cases respectively [tab. 11, fig.11].

Table 11: (Q11) Were there any particular reasons you didn't attend a course provided by Dorset New Forest Tourism Partnership?		
		2005
	Frequency	Valid %
Timing	82	43.9
Location	51	27.3
Not aware of DNFTP courses	33	17.6
Subject material not covered	30	16.0
Other	23	12.3
Cost	22	11.8
Desired level of training not catered for	16	8.6

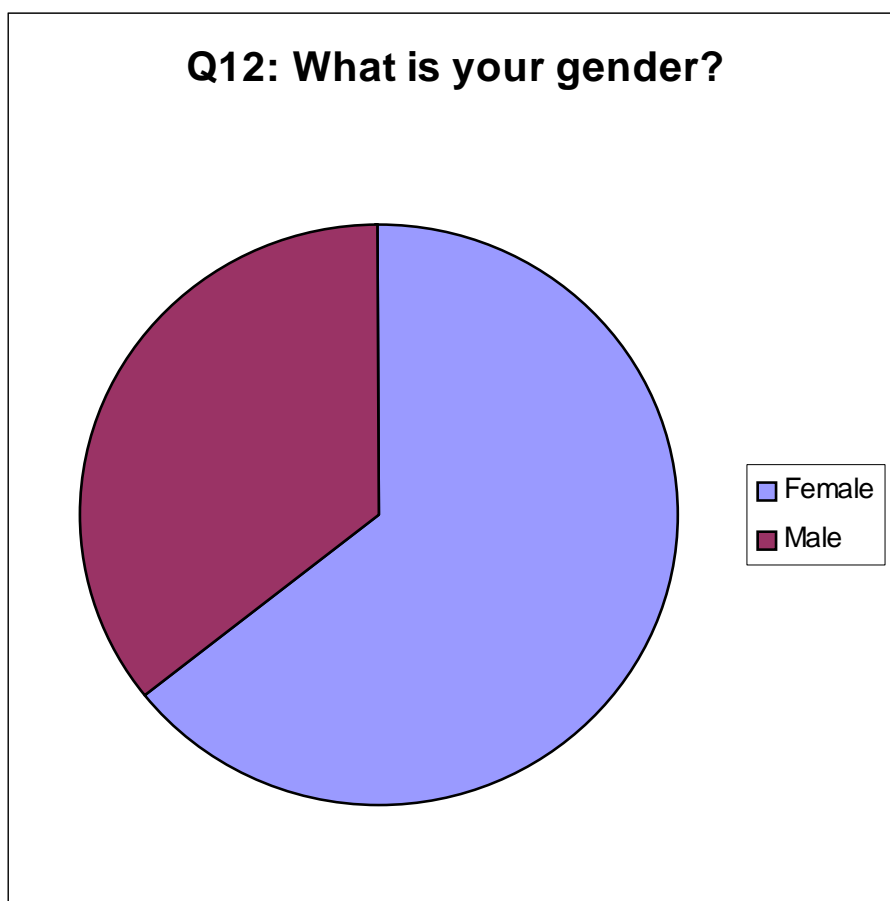


4.7: Demographic Information

4.7.1: Gender

The gender ratio of the respondents was approximately 1:2, with 36% males to 64% females [tab. 12, fig. 12].

Table 12: (Q12) What is your gender?		
		2005
	Frequency	Valid %
Female	189	64.3
Male	105	35.7
Total	294	100.0



4.7.2: Age

91% of all respondents were aged over 25 years and 61% were aged either 50 years or over. 34% of respondents were in the 25-49 age group, while only 5% of respondents were between 16 and 24 years of age [tab. 13, fig. 13].

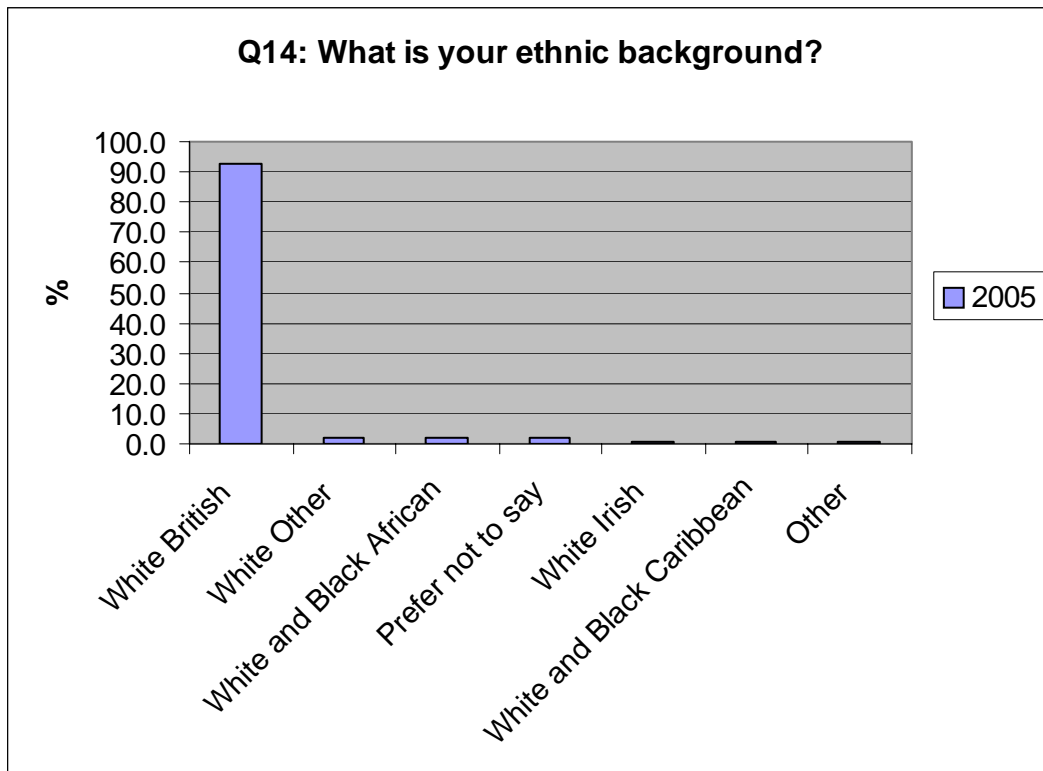
Table 13: (Q13) May we ask into which age group you fall?		
		2005
	Frequency	Valid %
16-24	14	4.7
25-49	101	34.0
50 and over	182	61.3
Total	297	100.0



4.7.3: Ethnic Background

A clear majority of respondents were White British (93%). Other ethnic backgrounds, such as White Irish, White and Black African, or White and Black Caribbean each constituted 2% or less of the total respondent ethnic backgrounds [tab.14, fig. 14].

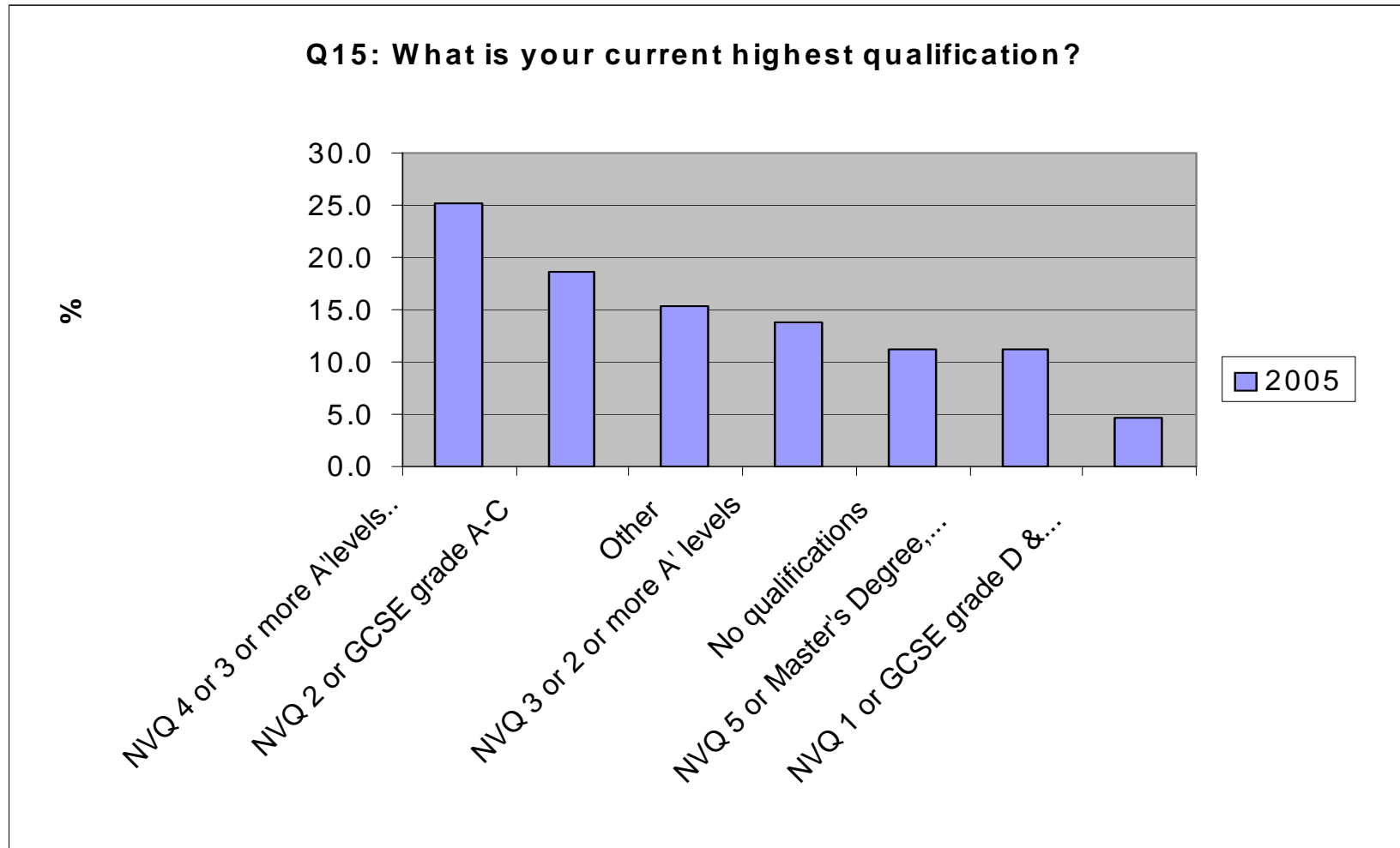
Table 14: (Q14) What is your ethnic background?		
		2005
	Frequency	Valid %
White British	276	92.9
White Other	6	2.0
White and Black African	5	1.7
Prefer not to say	5	1.7
White Irish	2	0.7
White and Black Caribbean	2	0.7
Other	1	0.3
Total	297	100.0



4.7.4: Education

Just over half the respondents (50%) were educated to 'A'-level or above and within this group 14% had 2 or more 'A'-levels, 25% had 3 or more 'A'-levels or a degree, and 11% had a postgraduate qualification [tab. 15, fig. 15].

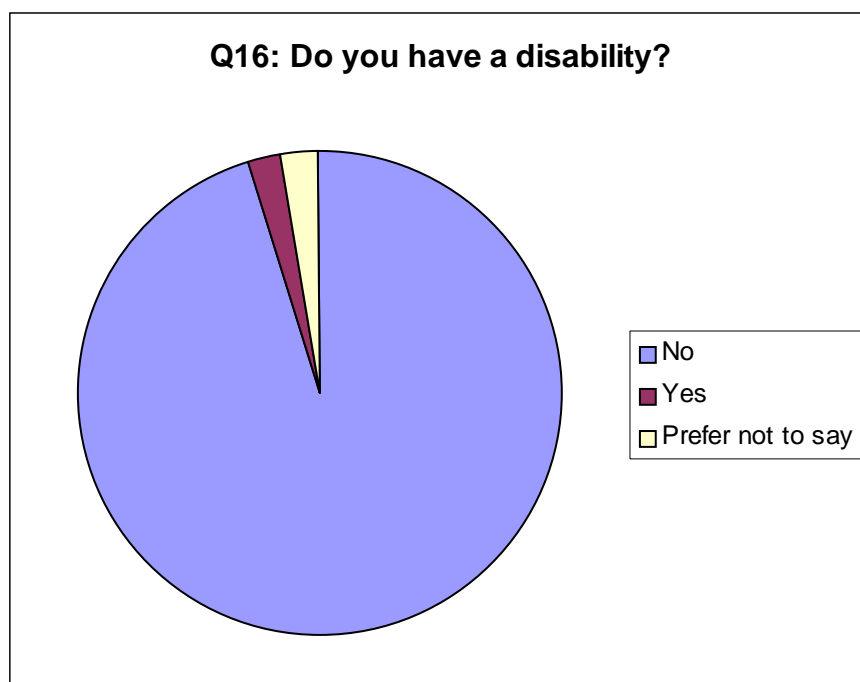
Table 15: (Q15) What is your current highest qualification?		
		2005
	Frequency	Valid %
NVQ 4 or 3 or more A'levels / Degree	69	25.1
NVQ 2 or GCSE grade A-C	51	18.5
Other	42	15.3
NVQ 3 or 2 or more A' levels	38	13.8
No qualifications	31	11.3
NVQ 5 or Master's Degree, PhD	31	11.3
NVQ 1 or GCSE grade D & below	13	4.7
Total	275	100.0



4.7.5: Disability

Most respondents did not have a disability (95%), whilst equal numbers of the remainder either confirmed that they had a disability (2%) or preferred not to say (2%) [tab.16, fig. 16].

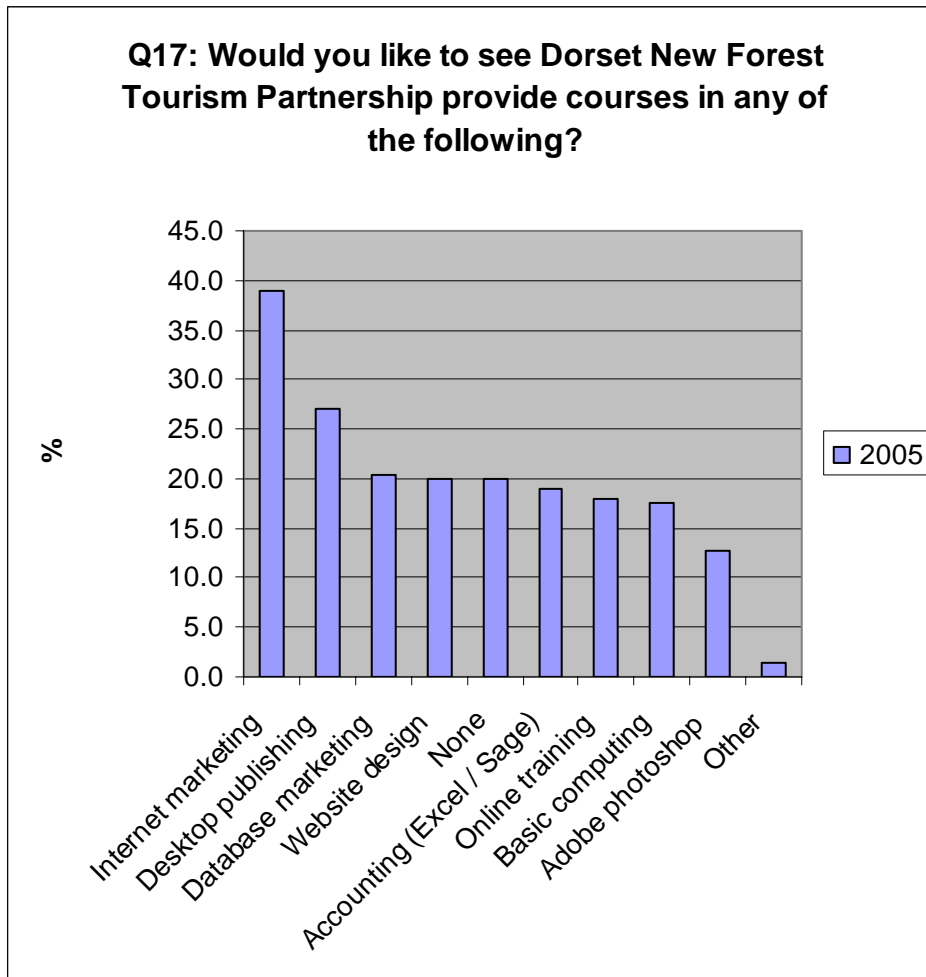
Table 16: (Q16) Do you have a disability?		
		2005
	Frequency	Valid %
No	282	95.3
Yes	7	2.4
Prefer not to say	7	2.4
Total	296	100.0



4.8: Future Demand for IT Courses

The previous reasons for non-attendance of DNFTP courses notwithstanding, only a fifth of respondents (20%) would not like to see future courses provided. The main area of interest is internet marketing, again reflecting the growth of internet and website use, with 39% of respondents interested in future courses on this topic. Over a quarter of respondents (27%) would like future courses in desktop publishing, with most other courses being of interest to approximately 20% of respondents. Only 13% would like future courses in Adobe Photoshop [tab. 17, fig. 17].

Table 17: (Q17) Would you like to see Dorset New Forest Tourism Partnership provide courses in any of the following?		
		2005
	Frequency	Valid %
Internet marketing	82	38.9
Desktop publishing	57	27.0
Database marketing	43	20.4
Website design	42	19.9
None	42	19.9
Accounting (Excel / Sage)	40	19.0
Online training	38	18.0
Basic computing	37	17.5
Adobe photoshop	27	12.8
Other	3	1.4



5: Conclusions

5.1: IT Usage

Computer usage in Dorset tourism businesses is commonplace with over 90% of respondents using at least one computer in both 2004 and 2005. Overall, usage is primarily for email and word processing purposes, but over half the respondents also browse the internet, create menus and leaflets, manage accounts, and maintain customer databases.

Conversely, less than half of all respondents use computers to manage or design websites, despite a significant growth in website ownership and/or participation in collective internet-based media.

The predominance of activities requiring basic skills contrasts with the relatively lower usage for specialist activities.

5.2: The Internet

Internet usage is a common feature of Dorset tourism businesses with high levels of accessibility and a growth in individual and group websites.

Over 95% of respondents with computers have some form of internet connection. The adoption of broadband connection has increased significantly since 2004 (an increase of 34%) and would appear to be at the expense of slower dial-up connections which have declined proportionally.

The switch to faster connections is arguably related to greater internet-based commercial activities, reflected in the growth of internet presence. Internet presence increased between 2004 and 2005, despite relatively lower levels of specialist website design and management skills, mentioned previously.

It would appear that internet usage remains unchanged and is primarily a marketing tool, since the availability of further functions has altered little. Only 10% of respondents in 2005 had facilities for online customer payments – a similar figure to 2004. Nevertheless, the internet has an important role in business generation, with almost 80% of respondents identifying that at least some of their business came from their website.

5.3: IT Support and Future Training

The majority of tourism businesses (64%) had not had any IT training or IT support since July 2004, but, where it had occurred, internet marketing and website design support were most prominent. The evidence also supports a future need for further similar courses.

Most respondents had not received IT training or support for some time, and the reasons for not attending Dorset New Forest Tourism Partnership courses were varied but predominantly related to convenience. Nearly half of the respondents (44%) suggested that course timing was an issue, whereas over a quarter (27%) gave the location as the main reason for not attending. Amongst other responses, of particular concern is that 18% of businesses were not aware of DNFTP courses at all.

Where support and training was sought, most was provided by private training providers (38%), whilst almost a third was supplied by Dorset New Forest Tourism Partnership (33%), and the remaining third was shared between colleges and other sources (16% and 26% respectively).

Of the 36% of respondents who had received training and/or support (regardless of provider), the subjects were relatively evenly spread, with only internet marketing and website design attracting higher levels of interest. This, again, reflects the growing significance of the internet and web-based marketing – a feature further emphasised by the response to Q17 and the desired training opportunities.

Just as some businesses have received past training/support in all areas of IT, up to 20% would like to see future DNFTP courses on a range of topics. The three most requested courses were Internet Marketing (39%), Desktop Publishing (27%), and Database Marketing (20%). While basic skills training is still required, the overriding requirement is for marketing and internet/website oriented training.

6: Appendix: The Survey Questionnaire

Dorset Tourism Business Survey 2005

Dorset New Forest Tourism Partnership would be very grateful if you could complete and return the following questionnaire by the 7th December, 2005. Simply tick the appropriate boxes or write in the spaces provided, and return the questionnaire in the freepost envelope provided. The questionnaire will only take a few minutes and the first entry drawn on the closing date will win a £250 voucher of your choice, with the second and third entries receiving a £50 voucher of their choice.

Q1 What type of business do you operate? (please tick the most appropriate)

- Hotel
- Guest House
- Bed and Breakfast
- Public House / Inn (with accommodation)
- Public House / Inn (without accommodation)
- Self-catering
- Holiday Park
- Camping or Caravan Site
- Restaurant
- Visitor Attraction
- Retail Outlet
- Transport Operator

Q2 How many staff do you employ? (Please include all PAID employees both full and part-time)

- None
- 1 - 5
- 6 - 50
- 51 - 250
- More than 250

Q3 Do you use 1 or more computers within your business?

- Yes No (go to Q6)

Q4 Does your business have an internet connection?

- No
- Yes, Dial-up
- Yes, Broadband

Q5 Which of the following activities do you use your computer for within you business?

- Website design
- Website management
- Browsing the internet
- Creating letters or other word processing
- Creating menus/leaflets
- Database of customers or similar
- Managing accounts
- E-mail
- Bookings/visitor numbers

Q6 Do you have a website or presence on....

- Your own website
- A collective/co-operative website
- None (go to Q9)

Q7 Can customers make payments to your business online?

- Yes No

Q8 Do you know what proportion of your business comes from the website?

- Less than 10%
- 10-25%
- 26-50%
- More than 50%
- Don't know

Q9 Has your business had any IT support or IT training since July 2004 (Please tick all that apply)?

- Website design Internet marketing
- Adobe Photoshop Desktop publishing
- Accounting (Excel / Sage) Online training
- Database marketing Other (please specify below)
- Basic computing None
- Other

Q10 Who provided this support?

- College.....
- Private training provider.....
- Dorset New Forest Tourism Partnership (go to Q12).....
- Other.....

Q11 Were there any particular reasons you didn't attend a course provided by Dorset New Forest Tourism Partnership?

- The subject material I was interested in wasn't covered.....
- The level of training I wanted wasn't catered for.....
- Location.....
- Timing.....
- Cost.....
- Was not aware of DNFTP courses.....
- Other (please note below).....
- Other

Q12 What is your gender?

- Male..... Female.....

Q13 May we ask into which age group you fall?

- 16-24.....
- 25-49.....
- 50 and over.....

Q14 What is your ethnic background?

- White British..... Bangladeshi.....
- White Irish..... Asian or Asian British Other.....
- White Other..... Black Caribbean.....
- White and Black Caribbean..... Black African.....
- White and Black African..... Black Other.....
- White and Asian..... Chinese.....
- Mixed Other..... Other.....
- Indian..... Not known.....
- Pakistani..... Prefer not to say.....

Q15 What is your current highest qualification?

- No qualifications.....
- NVQ 1 or GCSE grade D & below.....
- NVQ 2 or GCSE grade A-C.....
- NVQ 3 or 2 or more A' levels.....
- NVQ 4 or 3 or more A'levels / Degree.....
- NVQ 5 or Master's Degree, PhD.....
- Other.....

Q16 Do you have a disability?

- Yes..... No..... Prefer not to say.....

Q17 Would you like to see Dorset New Forest Tourism Partnership provide courses in any of the following? (tick all that apply)

- Website design..... Internet marketing.....
- Adobe photoshop..... Desktop publishing.....
- Accounting (Excel / Sage)..... Online training.....
- Database marketing..... Other.....
- Basic computing..... None.....
- Other

Q18 Please complete your name and address if you would like to be entered into the prize draw.


Name

Address

Postcode

Email / Telephone

Please tick here if you would prefer for your details not to be used by DNFTP to inform you of relevant future courses.....

 **Data Protection Act 1998.** Your details will be held securely by Dorset New Forest Tourism Partnership for the purpose of providing you with information about training courses you have expressed an interest in and for the prize draw. It will not be made available to any third party. Dorset New Forest Tourism Partnership will be the data controller. Should you wish to have your details removed from the database, this will be done immediately on request by writing to: Dorset New Forest Tourism Partnership, Bournemouth Town Hall, Bournemouth. BH2 6DY.