

# **The Use of IT Within Tourism Businesses in Dorset 2004**

**Final Report**  
(September 2004)



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 'Use of IT Within Dorset's Tourism Businesses' Survey was conducted by The Market Research Group, on behalf of the DNFTP in June 2004. It was designed to provide intelligence for, and research to guide the 'E2: Ready to Grow' project within the Dorset New Forest area. 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.
- IT usage is dependent on business size. Larger accommodation providers and visitor attractions use computers for a wide range of tasks.
- Usage of computers for stock control in the catering sector was notably low. Encouragement or training in this area may foster increases in efficiency amongst such businesses.
- Internet usage is widespread, but is viewed primarily as a marketing tool. E-Business is not widely used.
- Overall, tourism businesses had average levels of computer skills, with an absence of formal training. There are particular skills gaps in accounting and desktop publishing packages.
- Larger businesses tended to have higher levels of computer proficiency. General levels of computer proficiency are lower amongst smaller accommodation providers and in the catering sector.
- Generally, between one in four and one in three tourism businesses in Dorset would be interested in attending a course.
- Between one in ten and one in five tourism businesses in Dorset would be interested in attending any of the proposed courses.
- Interest in training was particularly high amongst larger accommodation providers and in the catering sector.
- Courses and software training related to the internet and website design and usage, and desktop publishing are the most highly recommended.

### **Headline Research Findings**

- All but 4% of respondents used computers within their business, and all but 3% were connected to the Internet. 81% of respondents used a mobile phone.
- Currently computer usage is limited to 1-5 employees and Internet connectivity to a 'dial up' format in most businesses.
- 'Email' and 'word processing' were the most widely used computer software packages amongst Dorset's businesses, whereas use for 'stock control' and 'bookings' was especially limited.
- Computer skills gaps were most notable in 'desktop publishing', 'accounting software' and 'databases', although few respondents felt at more than an 'intermediate' level with any computer systems.
- The Microsoft range of computer products was the most widely used, and Excel and Sage the most utilised accounting software. Less than a quarter of respondents currently uses a computer based reservations system.
- 63% of accommodation providers were integrated into a Local Authority destination management system, and 44% into a private system, with the majority offering up to 25% of their rooms by this method.
- 85% of respondents promoted their business through a website, of whom almost half considered it an 'essential' part of their business. However, only 30% had heard of the 'England Net' initiative.
- Regarding E-Business, approximately 40% of respondents order and make payments online, although only 10% accept payment in this way.
- 32% of respondents have received IT training, mostly in 'basic computer skills' through the DNFTP.
- Between one in four and one in three tourism businesses would be interested in attending the proposed IT training courses, of which 'Internet' and 'Website design' were the most popular options.
- Computer usage and knowledge within businesses was usually lowest amongst 'accommodation providers with less than five staff', and 'pubs and restaurants'. These sectors were also those most interested in receiving additional training.

## 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 Use of IT Within Tourism Businesses in Dorset 2004**

To provide intelligence for, and research to guide, the E2: Ready to Grow project within the Dorset New Forest area, the DNFTP have commissioned the Market Research Group at Bournemouth University. This research will provide benchmarks for the current use of Information Technology (IT) within Dorset and identify what tourism business needs are in terms of IT.

### **2.3: 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.

## **2.4: Project Aims and Objectives**

To research the use of information technology (IT) within tourism businesses in Dorset and to provide a benchmark for the E2: Ready to Grow project.

The project aims can be summarised in 2 simple objective statements, these are:

1. To audit the current use of IT within tourism businesses in Dorset.
2. To identify tourism business needs within the IT sphere.

## 3: Methodology

### **3.1: Target Population**

For the 'Use of IT Within Tourism Businesses in Dorset 2004' 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 'Use of IT Within Tourism Businesses in Dorset 2004' research was 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: Sample Size**

The 'Use of IT Within Tourism Businesses in Dorset 2004' questionnaire was sent by post to 2143 tourism businesses across Dorset. The total return amounted to 435 completed questionnaires (20.3% response rate), which represents a 20% response rate. A total sample of 435 implies a margin of error of  $\pm 4.7\%$  at the 95% confidence level, i.e. there is only a 5% probability - or 1 chance in 20 - of the margin of error being greater than  $\pm 4.7\%$ .

### **3.4: 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, cross-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 (73% of all respondents), with self-catering establishments comprising 23% of the return, bed and breakfast 22% and hotels 11%. Visitor attractions comprised 11% of the sample. [tab. 1a, fig. 1]

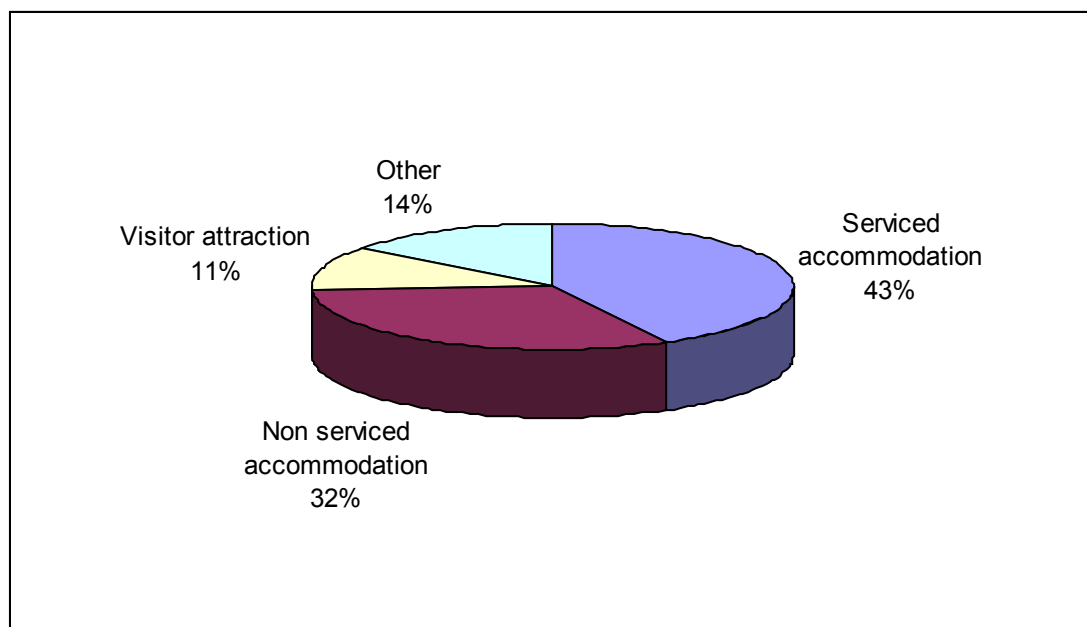
Statistically valid sub-samples (a sample of more than 100) were achieved for non serviced accommodation providers with less than 5 staff and serviced accommodation providers with less than 5 staff [tab. 1b]

<b>Table 1a: (Q1) What type of business do you operate?</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Self-catering	100	23.1
Bed and Breakfast	95	22.0
Visitor Attraction	49	11.3
Hotel	47	10.9
Guest House / Private Hotel	38	8.8
Restaurant	24	5.6
Camping or Caravan Site	23	5.3
Holiday Park	14	3.2
Public House / Inn (without accommodation)	11	2.5
Retail Outlet	9	2.1
Public House / Inn (with accommodation)	8	1.9
Transport Operator	5	1.2
Leisure centre	4	0.9
<b>Total</b>	<b>427</b>	<b>98.8</b>
<b>Other (please specify)</b>		
Chamber of commerce	1	0.2
College	1	0.2
Field Studies Centre	1	0.2
Internet café	1	0.2
Skatepark	1	0.2
<b>Total</b>	<b>432</b>	<b>100.0</b>



<b>Table 1b: Business Type by Number of Employees (Q1 &amp; Q2)</b>		
<i>Base: All respondents</i>	Frequency	Percent (%)
Serviced accommodation with less than 5 staff	139	32.5
Serviced accommodation with more than 5 staff	38	8.9
Non serviced accommodation with less than 5 staff	116	27.1
Non serviced accommodation with more than 5 staff	14	3.3
Pubs, restaurants	39	9.1
Visitor Attractions	35	8.2
Other	47	11.0
<b>Total</b>	<b>428</b>	<b>100.0</b>

**Fig 1: Business Type**



4.1.2: Employment

46% of businesses did not employ any staff. Almost one half of the sample, therefore, is comprised of sole traders or other self employed individuals. 54% of businesses did employ staff. [tab. 2]

27% of all businesses employed between 1 and 5 staff, and 27% of businesses employed more than 5 staff. [tab. 3]

50% of businesses with a workforce employed between 1 and 5 employees, 39% employed between 6 and 50, and 11% employed more than 50 employees. [tab. 4]

<b>Table 2: (Q2) Do you employ any staff?</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Yes	235	54.4
No	197	45.6
<b>Total</b>	<b>432</b>	<b>100.0</b>

<b>Table 3: (Q3) How many staff do you employ?</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
No Staff	197	45.8
1 - 5 Staff	116	27.0
More than 5 Staff	117	27.2
<b>Total</b>	<b>430</b>	<b>100.0</b>

<b>Table 4: (Q3) How many staff do you employ?</b>		
<i>Base: Businesses employing staff</i>	<b>Frequency</b>	<b>Percent (%)</b>
1 - 5	116	49.8
6 - 50	92	39.5
51 - 250	21	9.0
More than 250	4	1.7
<b>Total</b>	<b>233</b>	<b>100.0</b>

4.1.3: Respondent Role Within Company

49% of respondents were the owner / proprietor of their business, reflecting the high proportion of sole traders and other self employed businesses in the respondent profile [tab. 5].

<b>Table 5: (Q4) What is your role within the company?</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Owner/proprietor	211	49.4
Manager	54	12.6
Partnership	51	11.9
Director/Principal	50	11.7
Everything	12	2.8
Marketing	11	2.6
Organiser/Curator	9	2.1
Admin/PA	8	1.9
Secretary	7	1.6
Chairman	4	0.9
Licensee	3	0.7
IT	2	0.5
Accountant	1	0.2
Housekeeper	1	0.2
Buyer	1	0.2
Chef	1	0.2
Treasurer	1	0.2
<b>Total</b>	<b>427</b>	<b>100.0</b>

## 4.2: Computer usage

The majority of respondents (86%) had 1 - 5 computers within their business. 10% of respondents used more than 5 computers and 4% of businesses did not use computers. [tab. 6 - 8]

<b>Table 6: (Q5) How many computers do you use within your business?</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
None	18	4.3
1 to 5	360	86.1
More than 5	40	9.6
<b>Total</b>	<b>418</b>	<b>100.0</b>

<b>Table 7: (Q5) How many computers do you use within your business?</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
None	18	4.3
1	243	58.1
2 to 3	87	20.8
4 to 5	30	7.2
More than 5	40	9.6
<b>Total</b>	<b>418</b>	<b>100</b>

<b>Table 8: (Q5) How many computers do you use within your business?</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
0	18	4.3
1	243	58.1
2	68	16.3
3	19	4.5
4	15	3.6
5	15	3.6
6	6	1.4
7	4	1.0
8	3	0.7
9	1	0.2
10	2	0.5
11	1	0.2
12	4	1.0
14	1	0.2
15	3	0.7
18	1	0.2
19	1	0.2
25	3	0.7
26	1	0.2
30	1	0.2
34	1	0.2
53	1	0.2
80	1	0.2
100	4	1.0
450	1	0.2
<b>Total</b>	<b>418</b>	<b>100</b>

82% of businesses reported that between 1 and 5 people within their businesses used computers. 18% reported that more than 5 used computers, and less than 1% reported that no employees used computers. [tab. 9 -11]

<b>Table 9: (Q6) How many people use the computers within your business?</b>		
<i>Base: Businesses using computers</i>	<b>Frequency</b>	<b>Percent (%)</b>
None	1	0.3
1 to 5	309	82.2
More than 5	66	17.6
<b>Total</b>	<b>376</b>	<b>100.0</b>

<b>Table 10: (Q6) How many people use the computers within your business?</b>		
<i>Businesses using computers</i>	<b>Frequency</b>	<b>Percent (%)</b>
None	1	0.3
1	121	32.2
2 to 3	159	42.3
4 to 5	29	7.7
More than 5	66	17.6
<b>Total</b>	<b>376</b>	<b>100</b>

<b>Table 11: (Q6) How many people use the computers within your business?</b>		
<i>Businesses using computers</i>	<b>Frequency</b>	<b>Percent (%)</b>
0	1	0.3
1	121	32.2
2	138	36.7
3	21	5.6
4	18	4.8
5	11	2.9
6	14	3.7
7	8	2.1
8	5	1.3
9	1	0.3
10	9	2.4
13	1	0.3
15	3	0.8
16	1	0.3
17	1	0.3
20	9	2.4
25	3	0.8
30	1	0.3
37	1	0.3
40	1	0.3
50	1	0.3
60	1	0.3
80	1	0.3
98	1	0.3
100	1	0.3
110	1	0.3
300	1	0.3
725	1	0.3
<b>Total</b>	<b>376</b>	<b>100</b>



### 4.3: Internet Usage

97% of businesses using computers had an internet connection, and 3% did not. [tab. 12]

<b>Table 12: (Q7) Do you have an internet connection?</b>		
<i>Businesses with an internet connection</i>	<b>Frequency</b>	<b>Percent (%)</b>
Yes	387	96.8
No	13	3.2
<b>Total</b>	<b>400</b>	<b>100.0</b>

66% of businesses with an internet connection used a dial up connection. The comparatively low speed and functionality of dial up connectivity should be noted when considering potential for learning online and in design of websites aimed at tourism businesses in Dorset. 35% of businesses with an internet connection used broadband, and 4% used ADSL broadband [tab. 13]

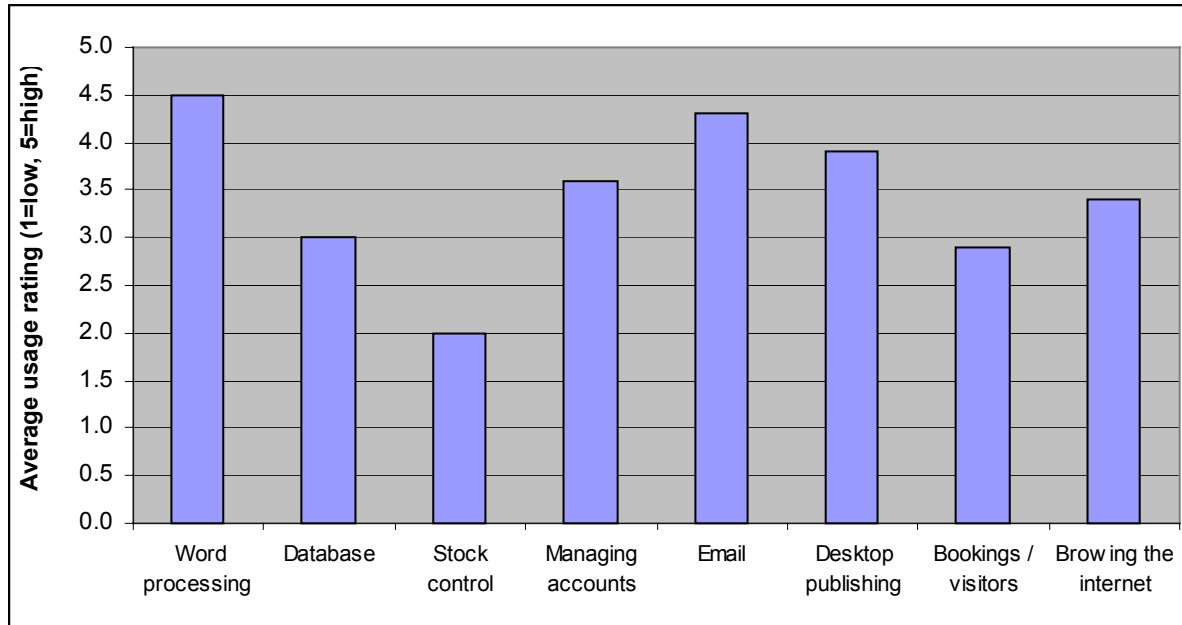
<b>Table 13: (Q8) What type of internet connection do you have?</b>		
<i>Businesses with an internet connection</i>	<b>Frequency</b>	<b>Percent (%)</b>
Dial up	255	66.2
Broadband	133	34.5
ADSL Broadband	14	3.6
<b>Total (Base: Multi Code)</b>	<b>385</b>	<b>/</b>

#### 4.4: Software Usage

Word processing and email packages are the most widely used in businesses responding to the survey (average rating of 4.5 and 4.3 respectively); three quarters of businesses felt that word processing was essential to their business, and 68% of businesses felt that email was essential. Desktop publishing (average rating 3.9), managing accounts (3.6) and the internet (3.0) were also fairly widely used functions. Notably, usage of computers for bookings was not particularly widespread, with 36% of respondents reporting that they did not use computers for this purpose at all. The only function less widely used was stock control. [tab. 14, fig. 2]

<i>Businesses using computers</i>	<b>Word processing (%)</b>	<b>Database (%)</b>	<b>Stock control (%)</b>	<b>Managing accounts (%)</b>	<b>Email (%)</b>	<b>Desktop publishing (%)</b>	<b>Bookings / visitors (%)</b>	<b>Browsing the internet (%)</b>
1) Not used at all	4.6	35.4	62.5	22.8	7.1	13.9	35.9	13.7
2) Some use	3.0	8.4	7.7	6.0	3.8	6.3	11.1	14.7
3) Regular use	6.1	11.7	10.6	10.3	9.8	11.4	12.0	25.3
4) Very regular use	10.9	8.9	5.0	7.3	11.6	14.7	6.7	12.6
5) Essential to my business	75.4	35.7	14.2	53.7	67.7	53.8	34.3	33.7
<b>Total (base)</b>	<b>395</b>	<b>359</b>	<b>339</b>	<b>369</b>	<b>396</b>	<b>368</b>	<b>359</b>	<b>380</b>
<i>Average rating (1 - 5)</i>	<i>4.5</i>	<i>3.0</i>	<i>2.0</i>	<i>3.6</i>	<i>4.3</i>	<i>3.9</i>	<i>2.9</i>	<i>3.4</i>

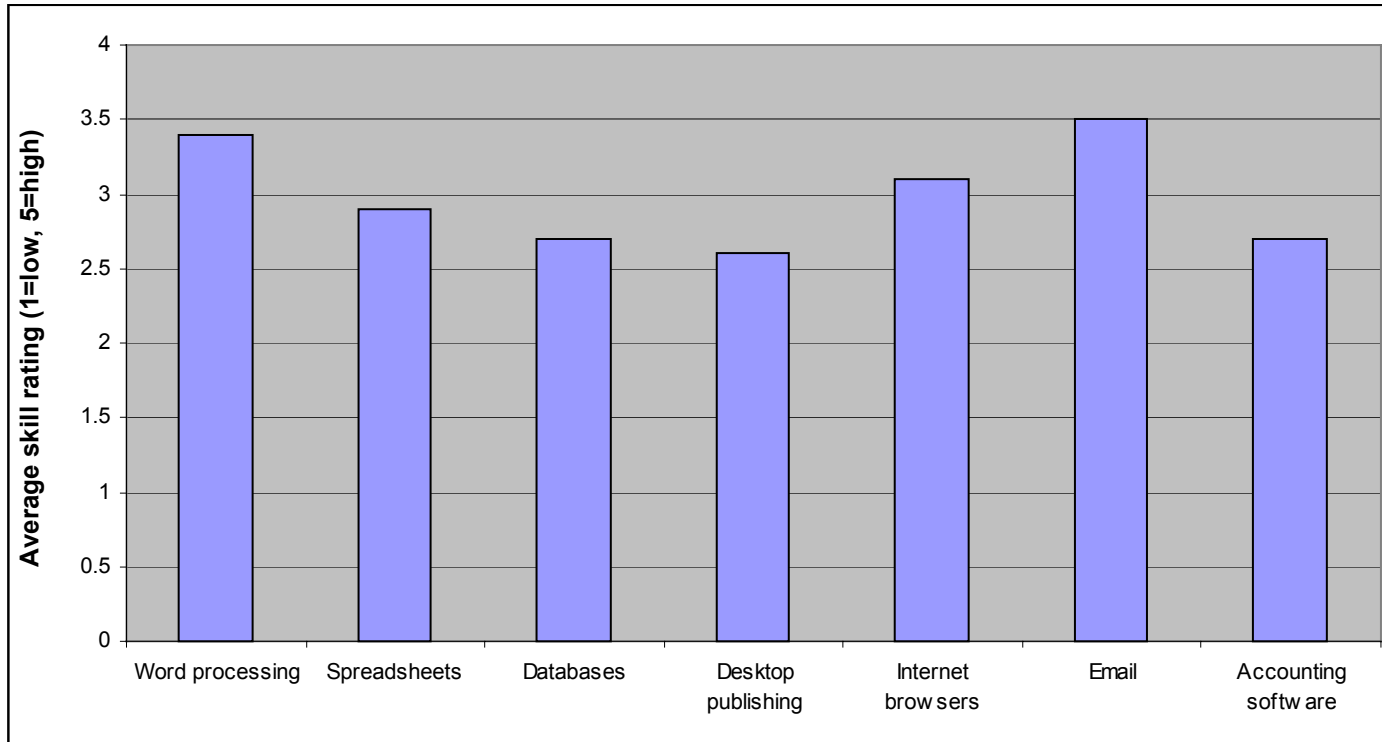
**Fig 2: Extent of Software Usage**



Respondents reported highest skill levels in email (average rating 3.5), word processing (3.4) and internet browsers (3.1). Skills gaps were most evident in desktop publishing, accounting software, and databases. [tab. 15, fig. 3]

<b>Table 15: Please rate the general skill level of your businesses in the following areas (Q10)</b>							
<i>Businesses using computers</i>	<b>Word processing (%)</b>	<b>Spreadsheets (%)</b>	<b>Databases (%)</b>	<b>Desktop publishing (%)</b>	<b>Internet browsers (%)</b>	<b>Email (%)</b>	<b>Accounting software (%)</b>
(1) No knowledge	1.3	12.1	13.5	21.1	7.3	2.0	27.8
(2) Beginner	7.6	19.8	26.0	27.6	15.1	6.6	16.3
(3) Intermediate	47.0	40.4	41.4	32.6	44.0	41.7	27.3
(4) Advanced	34.8	21.1	14.6	11.3	24.0	36.1	19.9
(5) Very advance	9.3	6.7	4.4	7.4	9.6	13.6	8.7
<b>Total (base)</b>	<b>396</b>	<b>389</b>	<b>384</b>	<b>380</b>	<b>384</b>	<b>396</b>	<b>381</b>
<i>Average rating (1-5)</i>	3.4	2.9	2.7	2.6	3.1	3.5	2.7

**Figure 3: Average Skill Rating**



As with industry in a broader sense a majority of respondents use Microsoft products, with 82% using Microsoft Office and 38% using Microsoft Works. [tab. 16]

<b>Table 16: (Q11) What primary software do you use?</b>		
<i>Base: Businesses using computers</i>	<b>Frequency</b>	<b>Percent (%)</b>
Microsoft Office	312	81.5
Microsoft Works	145	37.9
Other (please specify)	48	12.5
<b>Other (please specify)</b>		
Corel	26	6.8
Lotus	7	1.8
Sage	7	1.8
Windows	6	1.6
Apple MAC	3	0.8
Publisher	3	0.8
Hotel Perfect	2	0.5
SERIF	2	0.5
Quick Books	2	0.5
Backcourt Booking system	1	0.3
Claris Works	1	0.3
Dedicated booking system	1	0.3
Dreamweaver	1	0.3
Extensis, Portfolia, Clarisworks	1	0.3
Farm Plan	1	0.3
Hot metal, Quark	1	0.3
Hotelsoftware	1	0.3
Innsite	1	0.3
Page Plus 9	1	0.3
PageMaker, Photoshop, paint shop pro	1	0.3
Pegasus and Bleep Epos System	1	0.3
Picture it	1	0.3
Presswakes	1	0.3
Print Artist	1	0.3
Quick CAD	1	0.3
Quicken	1	0.3
Routefinder	1	0.3
Sema Voyager (bespoke)	1	0.3
<b>Total (Base: multi code)</b>	<b>383</b>	<b>/</b>

A majority of respondents (52%) use Microsoft Excel to undertake their accounting. This may be indicative of the generally small nature of tourism businesses within Dorset responding to the Survey. 29% of respondents use Sage as their accounting software. [tab. 17]

<b>Table 17: (Q12) What accounting software do you use?</b>		
<i>Base: Businesses using computers</i>	<b>Frequency</b>	<b>Percent (%)</b>
Excel	140	52.2
Sage	78	29.1
QuickBooks	29	10.8
Other (please specify)	52	19.4
<b>Other (please specify)</b>		
Quicken	6	2.2
Spreadsheets (own design)	5	1.9
Microsoft money	4	1.5
Dosh	3	1.1
Farmplan	3	1.1
Lotus	3	1.1
Opera	3	1.1
Dream	2	0.7
TAS	2	0.7
Pegasus	2	0.7
Aquila - access	1	0.4
Custom Windows	1	0.4
Guestline	1	0.4
IGS	1	0.4
Insite	1	0.4
Kerworth industry specific software	1	0.4
Key accounts	1	0.4
Newviews	1	0.4
SEMA Voyager	1	0.4
Simply Books	1	0.4
Soft Brands	1	0.4
Welcome	1	0.4
None	1	0.4
Mind your own Business	1	0.4
<b>Total (Base: multi code)</b>	<b>268</b>	<b>/</b>

#### 4.5: Computer Based Reservation Systems

23% of respondents used a computer based reservation system, and 77% of respondents did not use a computer based reservation system. [tab. 18]

<b>Table 18: (Q13) Do you use a computer based reservation system?</b>		
<i>Base: Businesses using computers</i>	<b>Frequency</b>	<b>Percent (%)</b>
Yes	86	22.8
No	291	77.2
<b>Total</b>	<b>377</b>	<b>100.0</b>

Of those businesses that use a computer based reservation system, 29% are not integrated into the internet at all, 61% are manually entered from bookings made on the internet and 10% are fully integrated into an internet booking system. [tab. 19]

<b>Table 19: (Q14) Which of the following statements most accurately describes your computer based reservation system?</b>		
<i>Base: Businesses using a computer based reservation system</i>	<b>Frequency</b>	<b>Percent (%)</b>
It is not integrated into the internet at all	24	28.6
Internet bookings from my own website are manually entered	29	34.5
Internet bookings from an external website are manually entered	22	26.2
Internet bookings from my own website are automatically integrated into my other bookings	5	6.0
Internet bookings from an external website are automatically integrated into my other bookings	4	4.8
<b>Total</b>	<b>84</b>	<b>100.0</b>



#### 4.6: Destination Management Systems

63% of accommodation providers were integrated into a Local Authority destination management system and 44% were integrated into a private destination management system. [tab. 20]

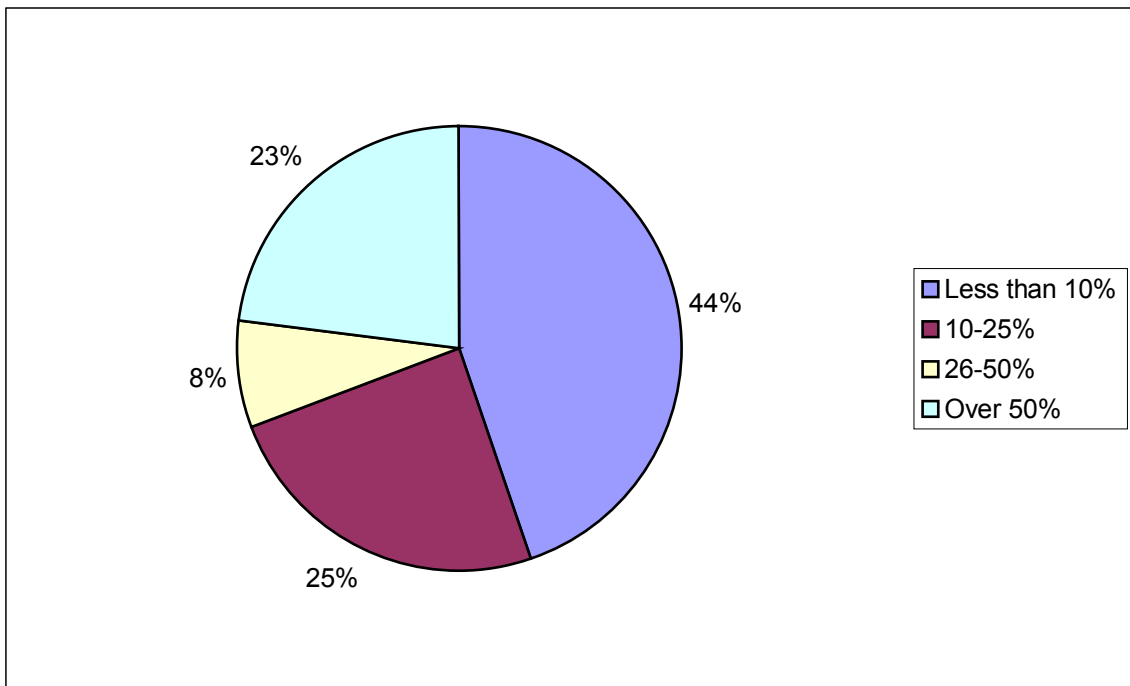
<b>Table 20: (Q15) Are you part of a destination management system of any type?</b>		
<i>Base: Accommodation providers</i>	<b>Frequency</b>	<b>Percent (%)</b>
Local authority	79	63.2
Private company	55	44.0
Small co-operative	9	7.2
Other (please specify)	4	3.2
<b>Other (please specify)</b>		
	<b>Frequency</b>	<b>Percent (%)</b>
Church	1	0.8
Interflora	1	0.8
Jargon	1	0.8
NFTA	1	0.8
<b>Total (Base: multi code)</b>	<b>310</b>	<b>/</b>

<b>Table 21: (Q16) Would you mind telling us the names of all the destination management systems that you use?</b>		
<i>Base: Accommodation providers</i>	<b>Frequency</b>	<b>Percent (%)</b>
Tiscover	13	19.4
West Dorset	8	11.9
Active	6	9.0
Aim	5	7.5
Bournemouth	4	6.0
Poole	4	6.0
Swanage	2	3.0
Purbeck	1	1.5
Lyme Regis	1	1.5
SW tourism	1	1.5
Avon Data - Hotel Exec, SAGE	1	1.5
B T B	1	1.5
B&B Nationwide	1	1.5
Best Western	1	1.5
Dell	1	1.5
Dream Cottages	1	1.5
English Country Cottages	1	1.5
Guestline	1	1.5
Hoseasons	1	1.5
Interflora	1	1.5
L.A	1	1.5
RMS	1	1.5
Sabre, Amadeus, Worldspan	1	1.5
Smoothound waterrooms etc	1	1.5
Softbrand	1	1.5
Stilwells	1	1.5
Super Breaks	1	1.5
TIC, Smoothhound, Visit Britain	1	1.5
Tourist Information Centre, English Tourism Council	1	1.5
WHCA, Getaway Digital, WHBC	1	1.5
YHA (England and Wales)	1	1.5
AA, NDDC, SWT, Shaftesbury Tourism Association	1	1.5
<b>Total</b>	<b>67</b>	<b>100.0</b>

69% of respondents gave less than 25% of their rooms to a destination management system. Interestingly, 17% - almost one in five – accommodation providers gave 100% of their rooms to a destination management system. [tab. 22 – 23, fig. 4]

Table 22: (Q17) Roughly what percentage of rooms do you give to the destination management systems?		
Base: Accommodation providers	Frequency	Percent (%)
Less than 10%	29	44.6
10-25%	16	24.6
26-50%	5	7.7
Over 50%	15	23.1
<b>Total</b>	<b>65</b>	<b>100.0</b>

**Figure 4: Roughly what percentage of rooms do you give to the destination management systems?**



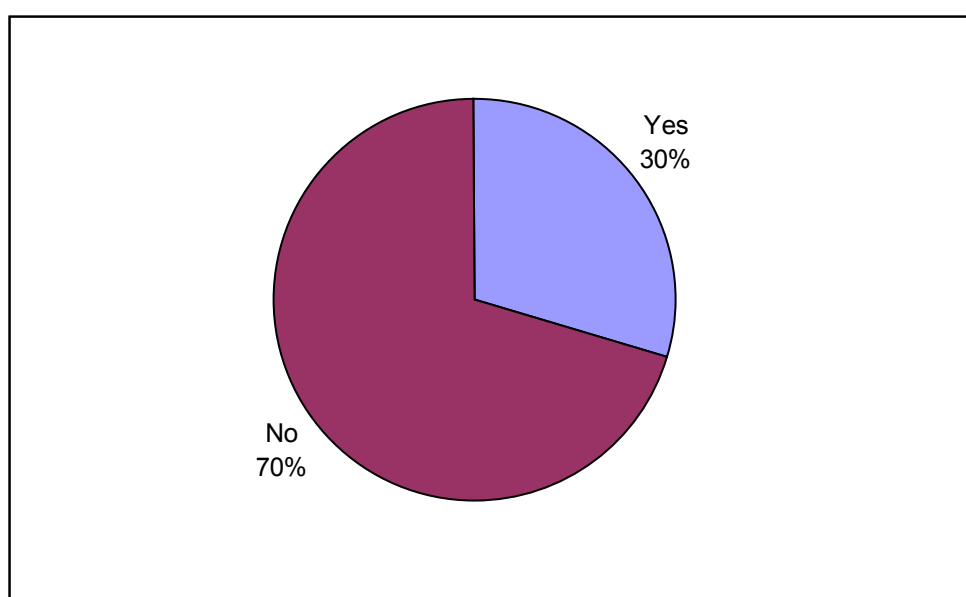
<b>Table 23: (Q17) Roughly what percentage of rooms do you give to the destination management systems?</b>		
<i>Base: Accommodation providers</i>	<b>Frequency</b>	<b>Percent (%)</b>
0%	14	21.5
1	2	3.1
2	4	6.2
4	1	1.5
5	8	12.3
10	6	9.2
14	1	1.5
15	3	4.6
20	3	4.6
25	3	4.6
30	3	4.6
33	1	1.5
50	1	1.5
60	1	1.5
80	2	3.1
90	1	1.5
100%	11	16.9
<b>Total</b>	<b>65</b>	<b>100.0</b>

### 4.7: E-Networks

30% of respondents had heard of Visit Britain's initiative England Net / Network for Tourism (N4T) and 70% had not. [tab. 24, fig. 5]

<b>Table 24: (Q18) Have you heard of Visit Britain's initiative England Net / Network for Tourism (N4T)?</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Yes	123	29.8
No	290	70.2
<b>Total</b>	<b>413</b>	<b>100.0</b>

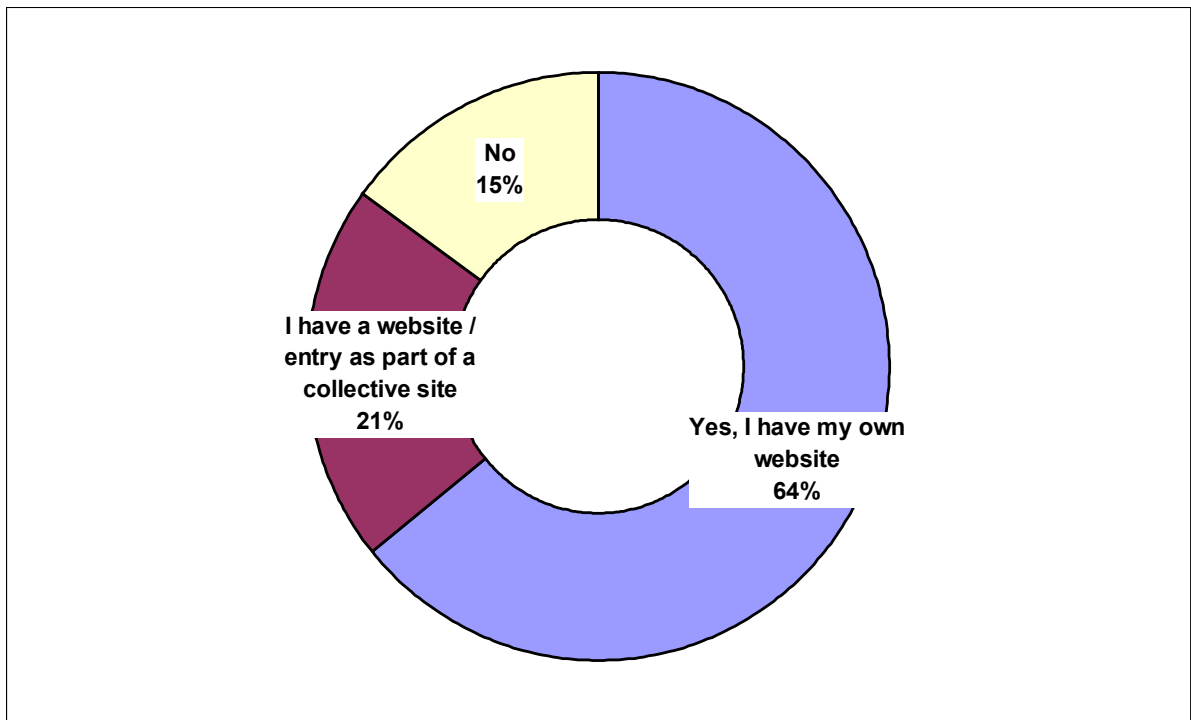
**Figure 5: Have you heard of Visit Britain's initiative England Net / Network for Tourism (N4T)?**



64% of respondents had their own website. A further 21% had a website or entry as part of a collective site. This suggests that collaborative websites are an important element in the e-networking capacity of Dorset's tourism industry. 15% of businesses had no website. [tab. 26, fig. 6]

<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Yes, I have my own website	274	64.3
I have a website / entry as part of a collective site	88	20.7
No	64	15.0
<b>Total</b>	<b>426</b>	<b>100.0</b>

**Figure 6: Do you have a website?**



47% of respondents considered their website essential to their business. A further 21% used their website very regularly, 19% regularly, 10% had some use of their website, and 3% did not use it at all. Overall, businesses rated the important of their website 4.0 on average – around “very regular use”.  
[tab. 20]

<b>Table 26: (Q20) If you have a website please rate its importance to your business</b>		
<i>Base: Businesses with a website</i>	<b>Frequency</b>	<b>Percent (%)</b>
(1) Not used at all	11	3.2
(2) Some use	34	9.8
(3) Regular use	67	19.4
(4) Very regular use	73	21.1
(5) Essential to my business	161	46.5
<b>Total</b>	<b>346</b>	<b>100.0</b>
<i>Average rating</i>	4.0 (around “very regular use”)	/

Businesses without a website tended to feel that they did not need one (12%), that it was too expensive (10%), that their business was too small (10%) or that they simply hadn't got round to it (12%). 12% of businesses without a website were in the process of developing one. [tab. 27]

<b>Table 27: (Q21) If you do not have a website/entry as part of a collective site, are there any reasons why not?</b>		
<i>Base: Businesses without a website</i>	<b>Frequency</b>	<b>Percent (%)</b>
Do not need one	6	12.2
Website design in progress/being set up	6	12.2
Have not got round to it	6	12.2
Too expensive	5	10.2
Too small	5	10.2
No computer	3	6.1
Time consuming	3	6.1
No reason	3	6.1
Yes	3	6.1
No computer	2	4.1
I don't know how to set one up	1	2.0
Just started in business	1	2.0
N.G.S does our advertising.	1	2.0
No information	1	2.0
On TIC	1	2.0
Prefer brochures	1	2.0
Advised against it by police	1	2.0
<b>Total</b>	<b>49</b>	<b>100.0</b>



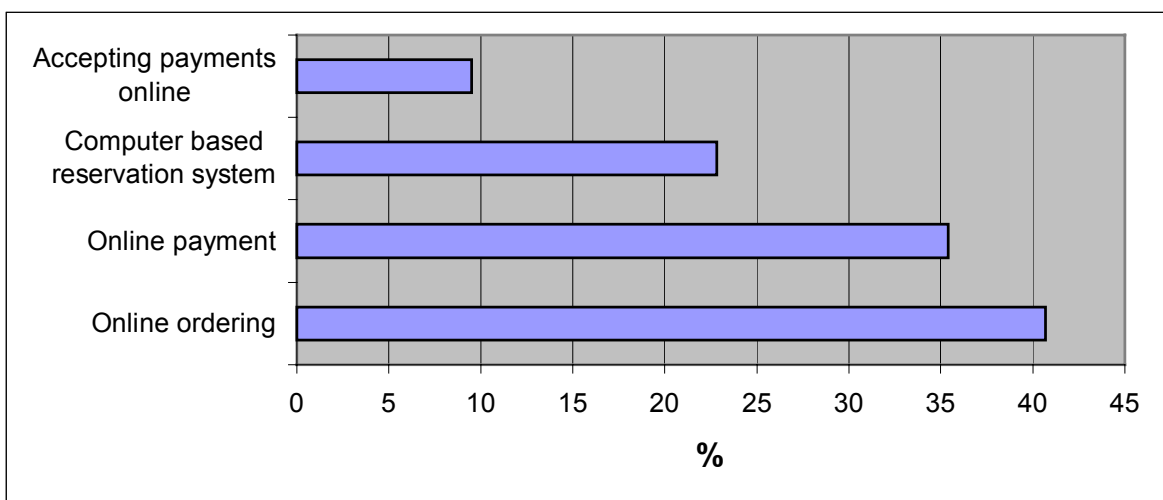
**4.8: E-Business**

Approximately 40% of respondents order and make payments online, though only 10% accept payments online. Together with the relatively low level of usage of online booking systems [tab. 18] this suggests that although the industry uses online methods to purchase supplies, it's own supply methods are still largely traditional – i.e. telephone, postal and on-site bookings and purchases. [tab 28 –29, fig. 7]

<b>Table 28: (Q22) Do you buy supplies for use in your business online?</b>		
<b>Order online</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Yes	174	40.7
No	253	59.3
<b>Total</b>	<b>427</b>	<b>100.0</b>
<b>Pay online</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Yes	127	35.4
No	232	64.6
<b>Total</b>	<b>359</b>	<b>100.0</b>

<b>Table 29: (Q23) Can customers make payments to your business online?</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Yes	41	9.5
No	390	90.5
<b>Total</b>	<b>431</b>	<b>100.0</b>

**Figure 7: Usage of online purchase / supply methods**



### 4.9: Mobile Technology

81% of respondents use a mobile telephone within their business. 58% used mobile email, with 25% using a laptop. A further 13% used Calendar, 7% used pagers, and 6% used Bluetooth. [tab. 30]

<b>Table 30: (Q24) Do you use any of the following mobile IT mediums within you business?</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Mobile telephone	261	80.8
Email	186	57.6
Laptop	80	24.8
Calendar	42	13.0
Pager	22	6.8
Bluetooth	19	5.9
PDA	11	3.4
Firewire	11	3.4
Other software applications (please specify)	5	1.5
Other mobile technology (please specify)	5	1.5
BlackBerry	1	0.3
Hotspot	1	0.3
<b>Other software</b>		
	<b>Frequency</b>	<b>Percent (%)</b>
Accounts	1	0.3
BT Phone	1	0.3
Free Wireless Network	1	0.3
Guestline	1	0.3
Orange Wap	1	0.3
PMR Radios	1	0.3
Sentinel	1	0.3
Welcome	1	0.3
<b>Other mobile technology</b>		
	<b>Frequency</b>	<b>Percent (%)</b>
3 Mobile	2	0.6
2 way radius	1	0.3
Coldcall	1	0.3
Digital Camera and Digital Video Camera	1	0.3
Fax	2	0.6
GSP	1	0.3
Radio Phones	1	0.3
VHF	1	0.3
Walkie talkies	1	0.3
<b>Total (Base: Multi code)</b>	<b>323</b>	<b>/</b>

19% of businesses using mobile technology felt that it was essential to their business. 16% used mobile technology on a very regular basis, and 21% on a regular basis. A further 28% got some use from their mobile technology, whilst 17% did not use it at all. Overall, businesses used their mobile technology “regularly” on average. [tab. 31]

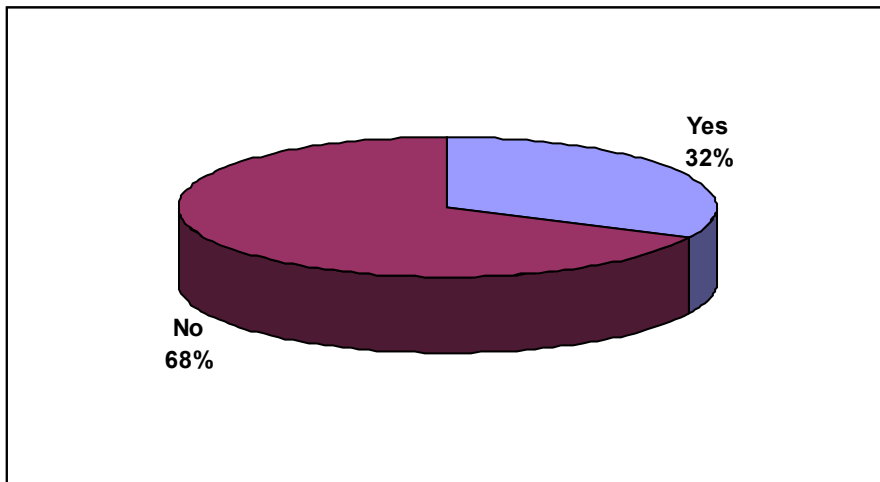
<b>Table 31: (Q25) If you use mobile IT technology, please rate from 1 - 5 its importance to your business</b>		
<i>Base: Businesses using mobile technology</i>	<b>Frequency</b>	<b>Percent (%)</b>
(1) Not used at all	40	16.6
(2) Some use	68	28.2
(3) Regular use	50	20.7
(4) Very regular use	38	15.8
(5) Essential to my business	45	18.7
<b>Total</b>	<b>241</b>	<b>100.0</b>
<i>Average rating</i>	<i>2.9 (around “regular use”)</i>	

**4.10: Levels of IT Training**

32% of respondents had received IT support or training, and 68% had not. [tab. 32, fig. 8]

<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Yes	131	32.1
No	277	67.9
<b>Total</b>	<b>408</b>	<b>100.0</b>

**Fig 8: Has your business had any IT support or IT training?**



The most common source of IT training amongst those businesses that had received training was the DNFTP (19%). A further 8% had received in-house training, 7% had received training from Kingston Maurward and 5% from Data Basics. [tab. 33]

<i>Base: Respondents who had received IT training</i>	<b>Frequency</b>	<b>Percent (%)</b>
DNFTP	22	18.6
In house	10	8.5
Kingston Maurward	8	6.8
Data Basics	6	5.1
Do not know/forgotten	4	3.4
Learndirect	4	3.4
Lyme net	3	2.5
Business link	2	1.7
Partners in Success	2	1.7
SAGE	2	1.7
Dorset adult education	1	0.8
Ministry of Defence	1	0.8
Poole IT	1	0.8
South West Tourism	1	0.8
Other	51	43.2
<b>Total</b>	<b>118</b>	<b>100.0</b>

The most common form of IT training that businesses had received was in basic computer skills (20%). A further 11% had received training in troubleshooting, 9% in Microsoft Office, and 7% had taken European Computer Driving Licence courses. 6% of businesses had received training in website design. [tab. 34]

<b>Table 34: (Q28) Please briefly describe the IT support or training you received</b>		
<i>Base: Respondents who had received IT training</i>	<b>Frequency</b>	<b>Percent (%)</b>
Basic computer skills	23	19.5
Troubleshooting	13	11.0
Microsoft Office	10	8.5
ECDL	8	6.8
Website design	7	5.9
Various courses	7	5.9
CLAIT	5	4.2
DNFTP courses	4	3.4
1 day course	3	2.5
SAGE	3	2.5
In house training	2	1.7
Beginners	2	1.7
Computers for the terrified	2	1.7
Self-training	2	1.7
1/2 day course	1	0.8
Online training	1	0.8
Training over the phone	1	0.8
Other	24	20.3
<b>Total</b>	<b>118</b>	<b>100.0</b>

#### 4.11: Demand for IT Training Courses

Amongst all tourism businesses, demand for both basic and advanced level training courses was between 20% and 30%. That is, between one in four and one in three tourism businesses in Dorset would be interested in attending any of the proposed courses. Notable exceptions to this rule were “One to one IT support” and “Taking and making payments online”, where demand was particularly low. [tab. 35, fig.9-10]

The most popular type of potential IT training courses related to the Internet. “Making the most of the internet” and “How to go about getting or improving a website” were the most popular courses, followed by “Realising the full potential of IT within my business” and “Basic computer training”. “One to one IT support” and “Taking and making payments online” were the least popular courses. [tab. 35, fig. 9-10]

47% of likely consumers of IT training would like to see basic level “making the most of the internet”, and 59% of likely consumers would like to see this course at a more advanced level. Almost one-quarter of all tourism businesses would like to see basic and advanced level “making the most of the internet”. [tab. 35, fig. 9-10]

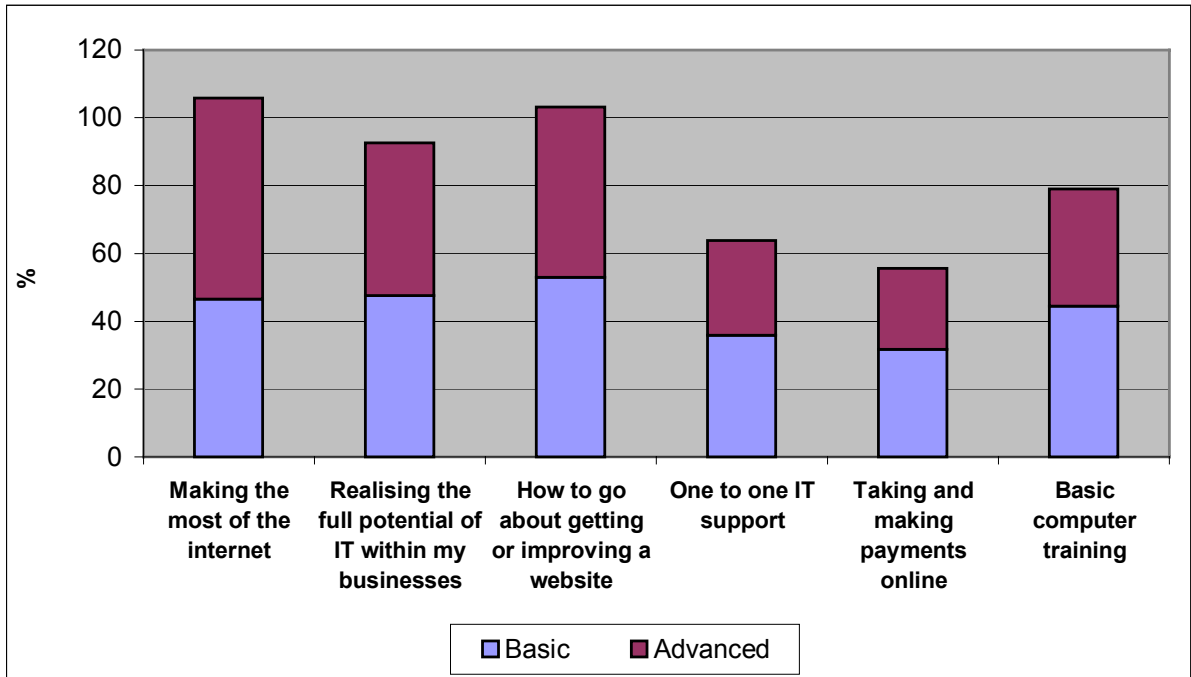
53% of likely consumers of IT training would like to see basic level “How to go about getting or improving a website”, and 50% of likely consumers would like to see this course at more advanced level. 27% of all tourism businesses would like to see this course at a basic level, and 22% at a more advanced level. [tab. 35, fig. 9-10]

<i>Base: All respondents</i>	<b>Basic</b>		<b>More advanced</b>	
	<i>Percent (Base: Respondents who would like IT training of any type)*</i>	<i>Percent (Base: all respondents)**</i>	<i>Percent (Base: Respondents who would like IT training of any type)*</i>	<i>Percent (Base: all respondents)**</i>
Making the most of the internet	46.6	23.9	59.1	26.2
Realising the full potential of IT within my businesses	47.5	24.4	45.1	20.0
How to go about getting or improving a website	52.9	27.1	50.3	22.3
One to one IT support	35.9	18.4	28.0	12.4
Taking and making payments online	31.8	16.3	23.8	10.6
Basic computer training	44.4	22.8	34.7	15.4

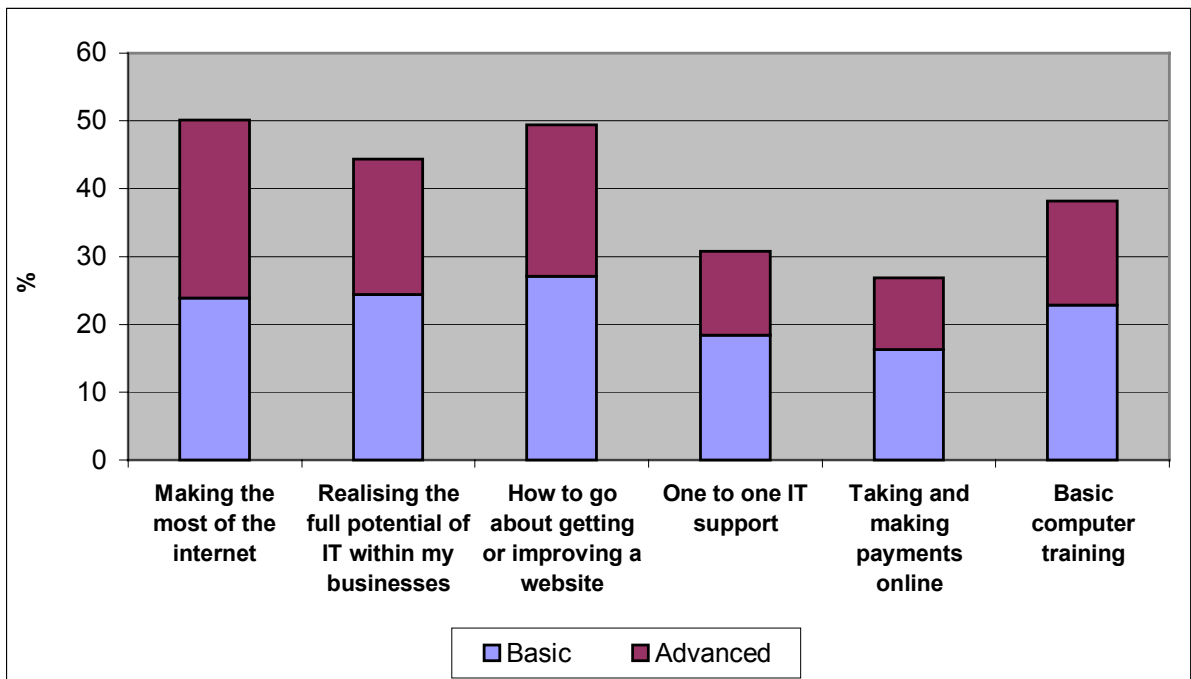
*\*These percentages show the demand for each type of training amongst businesses who are likely to be consumers of IT training.*

*\*\*These percentages show the demand for each type of training amongst all tourism businesses in Dorset, whether likely or unlikely to consume training.*

**Figure 9: Demand for IT training types amongst likely consumers of training**



**Figure 10: Demand for IT training types amongst all Dorset tourism businesses**



#### 4.12: Demand for Software Training

Amongst likely consumers of training, there was fairly robust demand for training in most software packages, particular at more advanced level [tab 36, fig.11-12 ].

Amongst all tourism businesses, demand for both basic and advanced level training in most software packages was between 12% and 19%. That is, between one in ten and one in five tourism businesses in Dorset would be interested in attending any of the proposed courses. The two exceptions to this were website design, where demand was particularly high, and mobile technology, where demand was particularly low. [tab 36, fig. 11-12]

The most popular type of software training was website design. 53% of likely training consumers would like to see basic level website design training, and 49% would like to see more advanced level. [tab 36, fig. 11-12]

Desktop publishing and spreadsheet training were also in relatively high demand. In both cases, respondents would generally prefer more advanced level training. [tab 36, fig. 11-12]

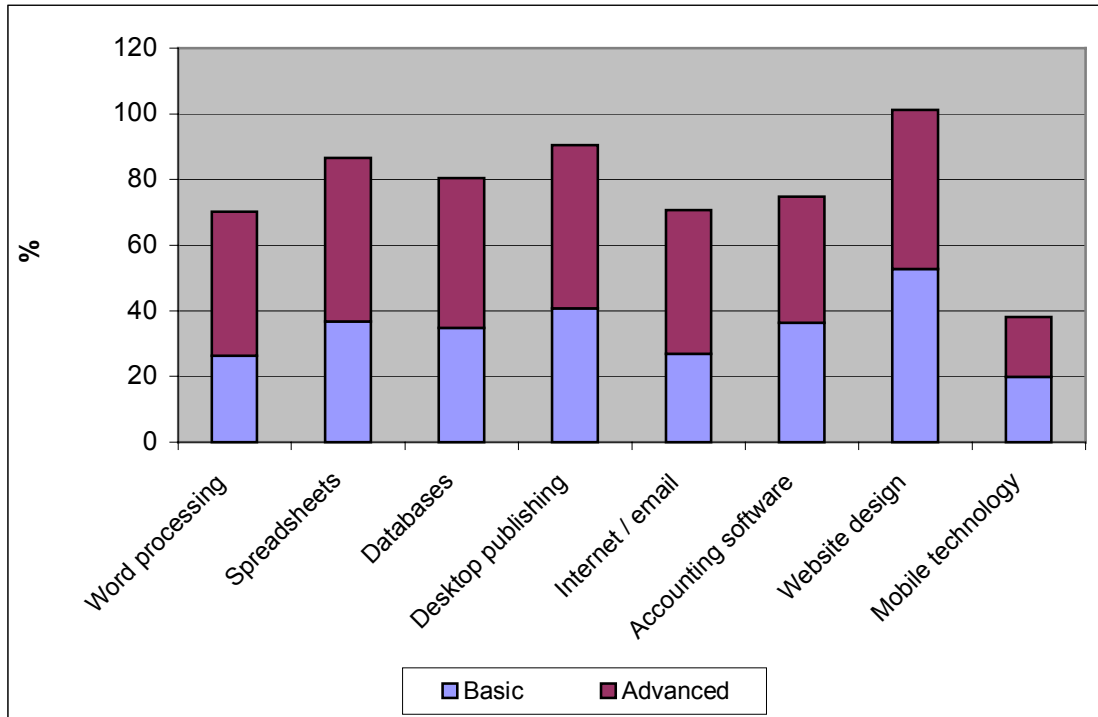
<b>Table 36: Would you like to see DNFTP provide courses in any of the following software packages? (Q30)</b>				
<i>Base: All respondents</i>	<b>Basic</b>		<b>More advanced</b>	
	<i>Percent (Base: Respondents who would like IT training of any type)*</i>	<i>Percent (Base: all respondents)**</i>	<i>Percent (Base: Respondents who would like IT training of any type)*</i>	<i>Percent (Base: all respondents)**</i>
Word processing	26.4	<b>12.2</b>	43.8	<b>17.0</b>
Spreadsheets	36.8	<b>17.0</b>	49.7	<b>19.3</b>
Databases	34.8	<b>16.1</b>	45.6	<b>17.7</b>
Desktop publishing	40.8	<b>18.9</b>	49.7	<b>19.3</b>
Internet / email	26.9	<b>12.4</b>	43.8	<b>17.0</b>
Accounting software	36.3	<b>16.8</b>	38.5	<b>14.9</b>
Website design	52.7	<b>24.4</b>	48.5	<b>18.9</b>
Mobile technology	19.9	<b>9.2</b>	18.3	<b>7.1</b>

*\*These percentages show the demand for each type of training amongst businesses who are likely to be consumers of IT training.*

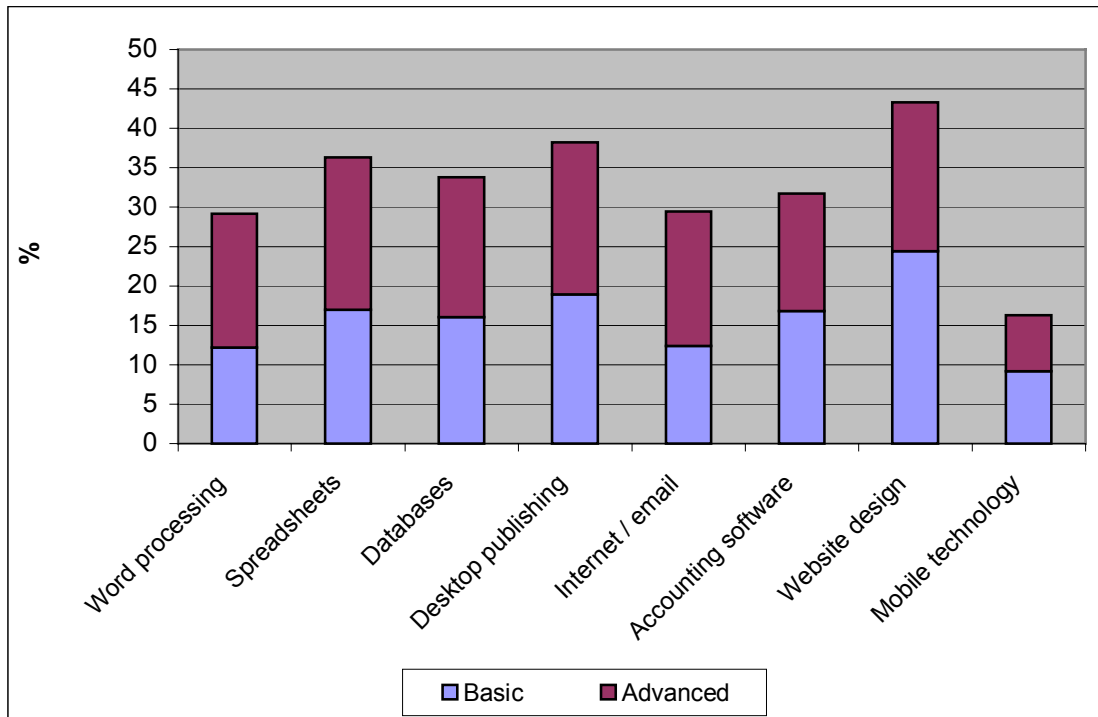
*\*\*These percentages show the demand for each type of training amongst all tourism businesses in Dorset, whether likely or unlikely to consume training.*



**Fig 11: Demand for software training amongst likely consumers of training**



**Fig 12: Demand for software training amongst all Dorset tourism businesses**



### 4.13: Contacting Businesses

Half of all respondents were interested in learning online [tab. 37]. However, as noted earlier, although the vast majority of businesses had an internet connection, almost two-thirds used the relatively slow dial-up method [tab 12 – 13]. This relatively low level of speed and functionality should be noted when considering the potential for online learning and courses offered via the internet.

<b>Table 37: (Q31) Would you be interested in learning online?</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Yes	164	49.8
No	165	50.2
<b>Total</b>	<b>329</b>	<b>100.0</b>

64% of respondents we happy to be contacted by the DNFTP about subsidised training [tab. 38].

<b>Table 38: (Q32) I would like Dorset New Forest Tourism Partnership to contact me about subsidised training.</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
Yes	248	63.9

## 5: Crosstabulations and Additional Analysis

### 5.1: Computer Use and Skills

Amongst the businesses surveyed, use of computers was highest amongst 'serviced' and 'non-serviced' accommodation providers with 'more than five staff'. Of these respondents, only 13% and 14% respectively did not consider a computer an integral (45% and 43%) or essential (42% and 43%) part of their business.

Whilst the responding 'visitor attractions' also made significant use of their computers, few of the other sectors surveyed considered the computers within their businesses to be used on more than an 'average' basis. As the following chart indicates, 71% of visitor attractions made 'frequent' or 'essential use of their computers, and although usage amongst 'pubs and restaurants' was split fairly evenly, only 42% of small 'serviced' accommodation providers, and 44% of small 'non-serviced' accommodation providers felt their usage was high.

Instead, replies from these latter two sector types suggests that they used their computers at no more than an average level, with 68% and 56% respectively noting an average, rare or nil usage [tab. 39].

<i>Base: All respondents</i>	Not used at all	Used rarely	Average use	Used frequently	Essential to business	Total
Serviced less than 5 staff	4.1	11.4	42.3	28.5	13.8	<b>100.0</b>
Serviced more than 5 staff	2.6	2.6	7.9	44.7	42.1	<b>100.0</b>
Non serviced less than 5 staff	0.9	15.1	39.6	32.1	12.3	<b>100.0</b>
Non serviced more than 5 staff	0.0	14.3	0.0	42.9	42.9	<b>100.0</b>
Pubs, restaurants	0.0	14.3	34.3	42.9	8.6	<b>100.0</b>
Visitor Attractions	0.0	5.7	22.9	37.1	34.3	<b>100.0</b>
Other	4.5	4.5	36.4	36.4	18.2	<b>100.0</b>
<b>Total</b>	<b>2.3</b>	<b>10.6</b>	<b>33.7</b>	<b>34.4</b>	<b>19.0</b>	<b>100.0</b>

The highest average computer skills level of employees amongst Dorset businesses can be found in the 'non-serviced accommodation' sector, with all employees in businesses with more than five staff showing at least an 'intermediate' level of proficiency.

Conversely, the lowest proficiency levels can also be found within this sector. Amongst those non-serviced providers with less than five staff computer skills levels are particularly low, with 37.8% of respondents suggesting their staff had only a 'beginners' level of knowledge at best. Size of businesses may well have had an effect on these figures, as proficiency amongst the smaller 'serviced accommodation' providers was also limited (32.5% with 'no' or a 'beginners' knowledge).

Overall however, the level of computer skills amongst tourism employees in Dorset can be considered as 'average'. Almost 50% of all respondents considered this an accurate description of their workers' knowledge [tab. 40].

<b>Table 40: Business Type by Number of Employees / Average Computer Skill Level. Crosstabulation (%)</b>						
<i>Base: All respondents</i>	No Knowledge	Beginner	Intermediate	Advanced	Very Advanced	Total
Serviced less than 5 staff	1.6	30.9	51.2	14.6	1.6	<b>100.0</b>
Serviced more than 5 staff	0.0	7.9	55.3	28.9	7.9	<b>100.0</b>
Non serviced less than 5 staff	3.8	34.0	37.7	22.6	1.9	<b>100.0</b>
Non serviced more than 5 staff	0.0	0.0	42.9	35.7	21.4	<b>100.0</b>
Pubs, restaurants	2.9	20.0	62.9	14.3	0.0	<b>100.0</b>
Visitor Attractions	0.0	8.6	54.3	31.4	5.7	<b>100.0</b>
Other	4.7	9.3	53.5	25.6	7.0	<b>100.0</b>
<b>Total</b>	<b>2.3</b>	<b>23.1</b>	<b>49.2</b>	<b>21.6</b>	<b>3.8</b>	<b>100.0</b>

Table 41 shows a composite calculation of the number of employees per each computer a business owns. A high ratio could imply the following:

- Low levels of usage of computers in businesses
- Relatively high levels of usage, but not enough IT capacity to provide employees with the level of computer support that they need. For example, a large hotel with 20 employees all requiring access to an online booking system, but only 2 computers on which this can be done. This would produce an employee / computer ratio of 10.

Conversely, a low employee / computer ratio could imply the following:

- High levels of computer usage in businesses
- Low numbers of employees. For example, a B&B with only one employee may have access to 2 personal computers, resulting in an employee / computer usage of 0.5.

The average tourism business in Dorset has one computer for every 1.3 employees.

<b>Table 41: Number of employees per computer (Q6/Q5)</b>		
<i>Base: Businesses with staff using computers</i>	<b>Frequency</b>	<b>Percent (%)</b>
Less than 1 employee per computer	84	19.3
1 employee per computer	166	38.2
Between 1 and 2 employees per computer	142	32.6
Between 2 and 3 employees per computer	31	7.1
More than 3 employees per computer	12	2.8
<b>Total</b>	<b>435</b>	<b>100.0</b>
<i>Average number of staff per computer</i>	1.3	

## 5.2: Software Use and Skills

Table 42 is a composite analysis of Q9 [tab. 14]. It illustrates the average level of usage of software generally, calculate by aggregating usage levels of each individual software package.

In general, software is fairly widely used, although only 19% of businesses felt that it was essential to the running of their businesses. The average usage rating was 3.6 – between “average use” and “used frequently” [tab. 42].

<b>Table 42: Average computer use of all software types (Q9)</b>		
<i>Base: All respondents</i>	<b>Frequency</b>	<b>Percent (%)</b>
(1) Not used at all	10	2.5
(2) Used rarely	44	11.0
(3) Average use	133	33.3
(4) Used frequently	138	34.5
(5) Essential to business	75	18.8
<b>Total</b>	<b>400</b>	<b>100.0</b>
<i>Average rating</i>	3.6 (between “average use” and “used frequently”)	

Table 43 is a composite analysis of Q10 [tab. 15]. It illustrates the average level of skill of software generally, calculate by aggregating skill levels of each individual software package.

Tourism businesses in Dorset tended to have intermediate levels of skill on software packages generally [tab. 43].

<b>Table 43: Average skill level across all software types (Q10)</b>		
<i>Base: Businesses using computers</i>	<b>Frequency</b>	<b>Percent (%)</b>
(1) No Knowledge	10	2.5
(2) Beginner	92	23.1
(3) Intermediate	195	49.0
(4) Advanced	85	21.4
(5) Very Advanced	16	4.0
<b>Total</b>	<b>398</b>	<b>100.0</b>
<i>Average rating</i>	3.0 (“intermediate”)	

The table below looks in greater detail at the extent of software usage across each businesses sector.

Overall, Dorset's businesses mainly use their computers for 'word processing' (ranked 4.5), and to 'email' (ranked 4.3). Usage of these aspects was 'very regular' amongst respondents of all types and sectors.

Each business sector also made at least 'regular' use of their computers to 'manage accounts' (ranked 3.6 overall), do 'desktop publishing' (ranked 3.9) and for 'browsing on the Internet' (ranked 3.4).

In contrast, businesses made much less use of their computers for 'stock control' (ranked 2.0). Whilst this may be expected for small accommodation providers who have little stock turnover, such low usage is surprising amongst the catering sector, where pubs and restaurants are likely to have regular dealings with suppliers.

Computer usage is also limited amongst respondents providing 'pubs, restaurants' and 'accommodation with less than five staff' when keeping track of their 'bookings and visitor numbers' This element is ranked at 2.9 overall, but at 1.8 for pubs and restaurants and 2.7 for the smaller accommodation providers [tab. 44].

<i>Base: All respondents</i>	<b>Word processing</b>	<b>Database</b>	<b>Stock control</b>	<b>Managing accounts</b>	<b>Email</b>	<b>Desktop publishing</b>	<b>Bookings / visitors numbers</b>	<b>Browsing the internet</b>
<b>Serviced less than 5 staff</b>	4.4	2.5	1.3	3.2	4.4	4.0	2.7	3.3
<b>Serviced more than 5 staff</b>	4.8	4.3	3.1	4.4	4.5	4.6	4.2	3.4
<b>Non serviced less than 5 staff</b>	4.5	2.6	1.4	3.3	4.3	3.2	2.7	3.4
<b>Non serviced more than 5 staff</b>	4.6	4.2	3.5	3.7	4.1	4.2	4.4	3.4
<b>Pubs, restaurants</b>	4.4	2.6	2.6	3.8	3.9	4.4	1.8	3.3
<b>Visitor attractions</b>	4.7	3.7	3.1	4.3	4.6	4	3.6	3.6
<b>Other</b>	4.6	3.5	2.3	4	4.2	3.7	2.8	3.3
<b>All business types</b>	<b>4.5</b>	<b>3.0</b>	<b>2.0</b>	<b>3.6</b>	<b>4.3</b>	<b>3.9</b>	<b>2.9</b>	<b>3.4</b>

### 5.3: The Internet and E-Business

The following table provides an overview of the extent of respondents' 'Internet usage' and involvement in 'E-Business' systems.

As noted in previous sections, the majority of tourism businesses in Dorset (85%) either have their 'own', or are involved with a 'collective', promotional website for their business. Despite this pro-activity, few respondents seem to be aware of the more generic 'EnglandNet' promotional website, with only the larger non-serviced providers having more than 50% awareness. Indeed, only an extremely low proportion of 'pubs and restaurants' (5.4%) had ever heard of the site.

The 'E-Business' systems considered are also only used by a few local businesses. In particular, under 10% of Dorset's businesses currently allow their 'customers to make payments' for their services online. Even the bigger accommodation providers do not usually allow this option.

The respondents' relationships with their suppliers also appear to be dealt with 'offline'. Whilst around 41% choose to place orders with suppliers online, only 35% are able to pay for their goods electronically - which could either indicate their own preferences or the limitations of their suppliers' own 'E-Business' systems.

Sector trends are similar for each aspect, with the greatest use amongst the larger 'accommodation providers' and 'visitor attractions', and the least amongst the smaller 'accommodation providers' and 'pubs and restaurants' in the area [tab. 45].

<i>Base: All respondents</i>	<b>Heard of EnglandNet (%)</b>	<b>Have a website (own or collaborative) (%)</b>	<b>Order supplies online (%)</b>	<b>Pay for supplies online (%)</b>	<b>Customers can make payments online (%)</b>
<b>Serviced less than 5 staff</b>	33.6	84.5	38.4	36.0	5.9
<b>Serviced more than 5 staff</b>	27.8	100.0	57.1	51.5	23.7
<b>Non serviced less than 5 staff</b>	36.1	80.7	33.3	32.3	4.3
<b>Non serviced more than 5 staff</b>	58.3	100.0	57.1	54.5	21.4
<b>Pubs, restaurants</b>	5.4	71.8	33.3	21.2	10.3
<b>Visitor attractions</b>	35.3	97.1	48.6	33.3	20.0
<b>Other</b>	14.0	82.2	45.7	36.6	10.6
<b>All business types</b>	<b>29.8</b>	<b>85.0</b>	<b>40.7</b>	<b>35.4</b>	<b>9.5</b>



Overall, only 23% of respondents currently used a computer based reservation system within their business. 77% did not use a computerised system to handle their bookings.

However, actual usage varied significantly across each business type. As the table below demonstrates, the businesses most likely to use a computerised reservation system are accommodation providers with more than five staff. Usage is also higher amongst the 'non-serviced' accommodation providers (86%) than those in the 'serviced' sector (66%).

These figures compare to only 14% of 'serviced' and 17% of 'non-serviced' accommodation providers with less than five staff.

Use of a computer based reservation system is lowest amongst respondents working within the catering sector, where only 9% of 'pubs and restaurants' currently use a computerised system [tab. 46].

<b>Table 46: Business Type by Number of Employees / Do you use a computer based reservation system? Crosstabulation (%)</b>			
<i>Base: All respondents</i>	<b>Yes (%)</b>	<b>No (%)</b>	<b>Total (%)</b>
Serviced less than 5 staff	13.8	86.2	100.0
Serviced more than 5 staff	65.8	34.2	100.0
Non serviced less than 5 staff	17.1	82.8	100.0
Non serviced more than 5 staff	85.7	14.3	100.0
Pubs, restaurants	8.9	91.1	100.0
Visitor Attractions	22.6	77.4	100.0
Other	14.3	85.7	100.0
<b>Total</b>	<b>23.0</b>	<b>77.0</b>	<b>100.0</b>

As the table below indicates, almost all of the responding businesses (97%) had an internet connection on their premises, and overall there was little significant variation in this aspect across the business types.

Areas of note include the particularly high level amongst 'accommodation providers' with more than five staff - all of whom stated that they had an internet connection, and also the slightly lower availability of a connection amongst the 'pubs and restaurants' of Dorset (94%) and the 'other' businesses (89%) [tab. 47].

<b>Table 47: Business Type by Number of Employees / Do you have an internet connection?</b>			
<b>Crosstabulation (%)</b>			
<i>Base: All respondents</i>	Do you have an internet connection?		
	<b>Yes (%)</b>	<b>No (%)</b>	<b>Total (%)</b>
Serviced less than 5 staff	97.6	2.4	100.0
Serviced more than 5 staff	100.0	0.0	100.0
Non serviced less than 5 staff	98.1	1.9	100.0
Non serviced more than 5 staff	100.0	0.0	100.0
Pubs, restaurants	94.3	5.7	100.0
Visitor Attractions	97.1	2.9	100.0
Other	88.6	11.4	100.0
<b>Total</b>	<b>96.7</b>	<b>3.3</b>	<b>100.0</b>

Although 85% of respondents made use of a promotional website for their business, less than two thirds actually had their own site.

As the chart below suggests, many of Dorset's smaller 'accommodation' businesses instead relied on collective Internet sites - around a quarter of providers with less than five staff overall.

In contrast, 87% of 'serviced' accommodation, and 92% of 'non-serviced' accommodation providers currently have their own website. Site ownership was also high amongst responding businesses from the 'visitor attractions' sector (86%)

Food and beverage providers such as 'pubs and restaurants' currently have the lowest ownership of promotional websites, as 28% of responding businesses did not have either individual or collective site involvement [tab. 48].

<b>Table 48: Business Type by Number of Employees / Do you have a website? Crosstabulation (%)</b>				
<i>Base: All respondents</i>	Yes, I have my own site	As part of a collective site	No	Total
Serviced less than 5 staff	58.8	25.7	15.4	100.0
Serviced more than 5 staff	86.8	13.2	0.0	100.0
Non serviced less than 5 staff	56.1	24.6	19.3	100.0
Non serviced more than 5 staff	92.3	7.7	0.0	100.0
Pubs, restaurants	61.5	10.3	28.2	100.0
Visitor Attractions	85.7	11.4	2.9	100.0
Other	60.0	22.2	17.8	100.0
<b>Total</b>	<b>64.3</b>	<b>20.7</b>	<b>15.0</b>	<b>100.0</b>

### 5.4: Training Course Contact

Overall, there was a good level of interest in subsidised IT training courses, with a significant proportion of businesses requesting that the DNFTP get in touch for further discussion on the options available.

Interest was particularly high amongst owners of 'pub and restaurant' businesses, of whom three quarters of respondents would like to hear more about training. 'Serviced' (74%) and 'non-serviced' (75%) accommodation providers with more than five staff were also curious.

Currently, the responding 'visitor attractions' felt that they were the least interested in receiving subsidised training - with just over half (53%) requesting further information [tab. 49].

<b>Table 49: Business Type by Number of Employees / Training course contact request. Crosstabulation (%)</b>	
Base: All respondents	I would like to be contacted
Serviced less than 5 staff	64.3
Serviced more than 5 staff	73.5
Non serviced less than 5 staff	64.4
Non serviced more than 5 staff	75.0
Pubs, restaurants	75.0
Visitor Attractions	52.9
Other	52.5
<b>TOTAL</b>	<b>64.2</b>

## 6: Conclusions and Recommendations

### 6.1: IT usage

***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.***

Almost all businesses responding to the survey reported that they used computers. However, the only functions used regularly by businesses in general were word processing and email - both of which were rated as essential business tools by many respondents - and to a lesser extent desktop publishing and accounts management.

***IT usage is dependent on business size. Larger accommodation providers and visitor attractions use computers for a wide range of tasks.***

Larger accommodation providers in both the serviced and non-serviced sectors used all types of IT regularly, with the possible exception of browsing the internet. In addition to word processing, email, desktop publishing and accounts management, these establishments also used computers for database management, stock control, and bookings. Indeed, many such businesses felt that these functions were essential to their business.

Similarly, visitor attractions were more likely to use computers regularly for a range of tasks.

***Usage of computers for stock control in the catering sector was notably low. Encouragement or training in this area may foster increases in efficiency amongst such businesses.***

Usage of mobile technology is low.

## 6.2: The Internet

***Internet usage is widespread, but is viewed primarily as a marketing tool. E-Business is not widely used.***

Most tourism businesses are connected to the Internet, although the most common form of connection is dialup. This relatively low level functionality of connectivity may be one of the reasons for low levels of E-Business functions such as ordering supplies and accepting payments online, particular amongst smaller businesses. Around one-third of smaller accommodation providers and pubs / restaurants use online methods when purchasing supplies. This proportion rises to around one half amongst visitor attractions, and slightly more than one half amongst larger accommodation providers.

The majority of businesses of all types had either their own website or a site a part of a collaboration. Indeed, almost 100% of larger accommodation providers and visitor attractions had websites. The lowest proportion of website possession was 72% in the pub / restaurant sector - still a relatively high proportion. This, together with low levels of E-Business usage, suggests that tourism businesses in Dorset view the internet as a marketing tool rather than a tool assisting the day-to-day operation of their business.

### **6.3: IT Literacy and Skills Gaps**

***Overall, tourism businesses had average levels of computer skills, with an absence of formal training. There are particular skills gaps in accounting and desktop publishing packages.***

Respondents reported highest levels of proficiency (between "intermediate" and "advanced" in email and work processing, which were also the most widely used computer functions. Proficiency in accounting software and desktop publishing was lower (between "beginner" and "advanced"). Considering this together with the fact that these are fairly widely used functions - with significant proportions of respondents reporting that they are essential to business - suggests skills gaps in these areas.

***Larger businesses tended to have higher levels of computer proficiency. General levels of computer proficiency are lower amongst smaller accommodation providers and in the catering sector.***

Skill levels were particularly high amongst larger non-serviced accommodation providers, and particularly low amongst smaller non-serviced accommodation providers.

Similarly, larger serviced accommodation providers reported higher levels of proficiency than small serviced accommodation providers, although the difference was less pronounced than that apparent in the non serviced sector, suggesting potential for improved skills levels amongst the regions larger hotels.

Visitor attractions reported a similar level of proficiency to larger serviced accommodation providers - around "intermediate".

Pubs and restaurants also reported relatively low levels of proficiency.

## **6.4: The Demand for General Training Courses**

***Generally, between one in four and one in three tourism businesses in Dorset would be interested in attending a course. Given a tourism workforce of approximately 34,000<sup>1</sup>, this suggests a potential demand for courses of between 8,000 and 11,000 tourism employees in Dorset.***

The most popular type of potential IT training courses related to the Internet. "Making the most of the internet" and "How to go about getting or improving a website" were the most popular courses, followed by "Realising the full potential of IT within my business" and "Basic computer training". "One to one IT support" and "Taking and making payments online" were the least popular courses.

Despite relatively low levels of IT proficiency amongst smaller accommodation providers, these business were - along with visitor attractions - least interested in receiving further information about training courses from the DNFTP.

***Interest in training was particularly high amongst larger accommodation providers and in the catering sector.***

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<sup>1</sup> Source: South West Regional Research Group, 2001



## **6.5: The Demand for Software Training**

***Between one in ten and one in five tourism businesses in Dorset would be interested in attending any of the proposed courses. Given a tourism workforce of approximately 34,000<sup>2</sup>, this suggests a potential demand for courses of between 3,000 and 6,000 tourism employees in Dorset.***

The most popular type of software training was website design. Desktop publishing and spreadsheet training were also in relatively high demand. In both cases, respondents would generally prefer more advanced level training.

Despite relatively low levels of IT proficiency amongst smaller accommodation providers, these business were - along with visitor attractions - least interested in receiving further information about training courses from the DNFTP.

***Interest in training was particularly high amongst larger accommodation providers and in the catering sector.***

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<sup>2</sup> Source: South West Regional Research Group, 2001

## **6.6: Recommended Courses**

It is recommended that the DNFTP consider the following order of priority in offering general training courses:

- 1) How to go about getting or improving a website
- 2) Making the most of the internet
- 3) Realising the full potential of IT within my business
- 4) Basic computer training (particularly at a basic level)
- 5) One to one IT support
- 6) Taking and making payments online

It is recommended that the DNFTP consider the following order of priority in offering software training:

- 1) Website design (particularly at a basic level)
- 2) Desktop publishing
- 3) Spreadsheets
- 4) Accounting software
- 5) Word processing (particularly at a more advanced level)
- 6) Databases
- 7) Internet / email
- 8) Mobile technology

## 7: Appendix: The Survey Questionnaire



### Tourism Business Survey 2004

Dorset New Forest Tourism Partnership are working to improve the services they offer to tourism businesses in the area by undertaking research to discover the precise needs and requirements of local providers. They would therefore be very grateful if you would complete and return the following questionnaire by 5th July 2004. 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 £100 of vouchers of your choice.

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

- Hotel.....
- Guest House / Private Hotel .....
- 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 .....
- Other (please specify).....
- Other \_\_\_\_\_

**Q2 Do you employ any staff?**

- Yes .....  Go to Q3
- No .....  Go to Q4

**Q3 How many staff do you employ? (Please include all PAID employees)**

- 1 - 5.....
- 6 - 50.....
- 51 - 250.....
- More than 250.....

**Q4 What is your role within the company?**

**Q5 How many computers do you use within your business?**

**If you do not use computers within your business, please go to Q18.**

**Q6 How many people use the computers within your business?**

**Q7 Do you have an internet connection?**

- Yes .....  Go to Q8
- No .....  Go to Q9

**Q8 What type of internet connection do you have? (please tick all that apply)**

- Dial up.....
- Broadband .....
- ADSL Broadband .....

**Q9 To what extent do you use your computer to achieve the following within your business? (please rate from 1 - 5, where 1 is "not used at all" and 5 is "essential to my business")**

	1	2	3	4	5
Creating letters and other word processing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A database of customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stock control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Managing accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creating menus / leaflets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bookings / visitor numbers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Browsing the internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q10 Please rate the general skill level of your business in the following areas. (please tick one on each line)**

	No knowledge	Beginner	Intermediate	Advanced	Very advanced
Word processing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spreadsheets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Databases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Desktop publishing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet browsers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting software	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q11 What primary software do you use? (please tick any that apply)**

Microsoft Office .....

Microsoft Works .....

Corel .....

Other (please specify) .....

Other \_\_\_\_\_

**Q12 What accounting software do you use? (please tick any that apply)**

Sage .....

Quickbooks .....

Excel .....

Other (please specify) .....

Other \_\_\_\_\_

**Q13 Do you use a computer based reservation system?**

Yes .....  Go to Q14

No .....  Go to Q15

**Q14 Which of the following statements most accurately describes your computer based reservation system?(please tick most appropriate only)**

It is not integrated into the internet at all .....

Internet bookings from my own website are manually entered .....

Internet bookings from an external website are manually entered .....

Internet bookings from my own website are automatically integrated into my other bookings .....

Internet bookings from an external website are automatically integrated into my other bookings .....

**If you are not an accommodation provider please go straight to Q18**

**Q15 Are you part of a destination management system of any type? (tick all that apply)**

Local authority .....

Private company .....

Small co-operative .....

Other (please specify) .....

Other \_\_\_\_\_

**Q16** Would you mind telling us the names of all the destination management systems that you use?

**Q17** Roughly what percentage of rooms do you give to the destination management systems?  
 % .....

**Q18** Have you heard of Visit Britain's initiative England Net / Network for Tourism (N4T)?  
 Yes.....   
 No .....

**Q19** Do you have a website? (please tick one only)  
 Yes, I have my own website .....   
 I have a website / entry as part of a collective site .....   
 No .....

**Q20** If you have a website please rate from 1 - 5 the importance of the website, where 1 is "not used at all" and 5 is "essential to my business"  
 1            2            3            4            5  
               

**Q21** If you do not have a website / entry as part of a collective site, are there any particular reasons why not?

**Q22** Do you buy supplies for use in your business online?  

	Yes	No
Order online	<input type="checkbox"/>	<input type="checkbox"/>
Pay online	<input type="checkbox"/>	<input type="checkbox"/>

**Q23** Can customers make payments to your business online?  
 Yes.....   
 No .....

**Q24** Do you use any of the following mobile IT mediums within your business? (please tick all that apply)  
 Mobile telephone.....   
 Pager .....   
 PDA.....   
 Laptop .....   
 Firewire .....   
 Bluetooth.....   
 BlackBerry.....   
 Hotspot.....   
 Email .....   
 Calendar .....   
 Other software applications (please specify) ....   
 Other mobile technology (please specify) .....   
 Other software \_\_\_\_\_  
 Other mobile technology \_\_\_\_\_

**Q25** If you use mobile IT technology, please rate from 1 - 5 its importance to your business (where 1 is "not used at all" and 5 is "essential to my business")  
 1            2            3            4            5  
               

**Q26** Has your business had any IT support or IT training?  
 Yes .....  Go to Q27  
 No .....  Go to Q29

**Q27** Which company provided your IT support or training?

**Q28** Please briefly describe the IT support or training you received.

**Q29** Dorset New Forest Tourism Partnership is planning to offer subsidised IT training to the tourism industry. Would you like to see them provide any of the following (please tick all that apply)

	Beginner	More advanced
Making the most of the internet	<input type="checkbox"/>	<input type="checkbox"/>
Realising the full potential of IT within my business (accounts / stock control / word processing / payroll etc)	<input type="checkbox"/>	<input type="checkbox"/>
How to go about getting or improving a website	<input type="checkbox"/>	<input type="checkbox"/>
One to one IT support	<input type="checkbox"/>	<input type="checkbox"/>
Taking and making payments online	<input type="checkbox"/>	<input type="checkbox"/>
Basic computer training	<input type="checkbox"/>	<input type="checkbox"/>

**Q30** Would you like to see Dorset New Forest Tourism Partnership provide courses in any of the following specific software packages? (tick all that apply)

	Beginner	More advanced
Word processing	<input type="checkbox"/>	<input type="checkbox"/>
Spreadsheets	<input type="checkbox"/>	<input type="checkbox"/>
Databases	<input type="checkbox"/>	<input type="checkbox"/>
Desktop publishing	<input type="checkbox"/>	<input type="checkbox"/>
Internet / email	<input type="checkbox"/>	<input type="checkbox"/>
Accounting software	<input type="checkbox"/>	<input type="checkbox"/>
Website design	<input type="checkbox"/>	<input type="checkbox"/>
Mobile technology	<input type="checkbox"/>	<input type="checkbox"/>

**Q31** Would you be interested in learning online?

Yes.....

No.....

**Q32** Please tell us whether you would like Dorset New Forest Tourism Partnership to contact you about subsidised training courses, and whether you would like to be entered into the prize draw. If so, please fill in your details below.

I would like Dorset New Forest Tourism Partnership to contact me about subsidised training courses.....

I would like to be entered into the prize draw.....

Name

Address

Postcode

Telephone

Email



**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.