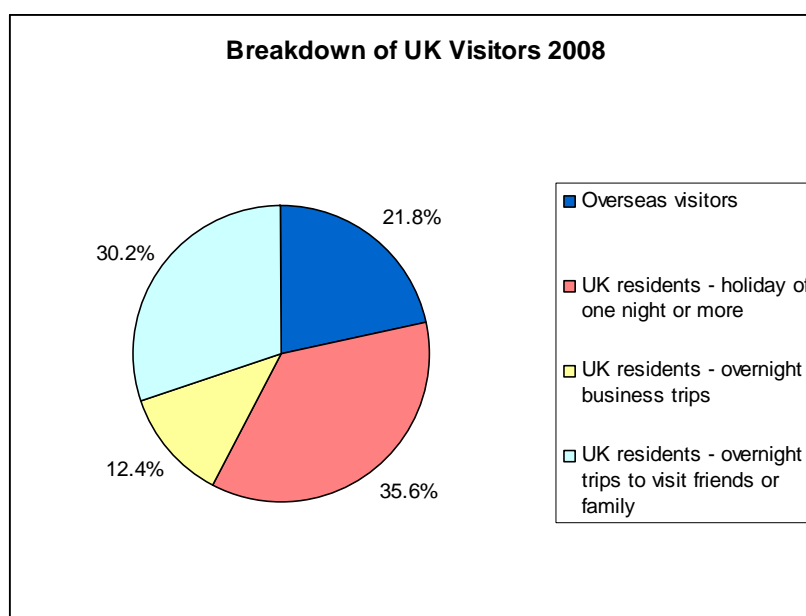


State of Tourism Report

Aim of Report

This report will be published annually by Destination Dorset and aims to set out a basic set of facts and figures relating to tourism both in Dorset and the wider context. The information below is sourced from Visit Britain, Enjoy England, South West Tourism, The Dorset visitor's survey, Tourism Insight articles and ABTA the Travel Association.

1. Visitor breakdown 2008 UK Domestic vs. International



(source: Visit Britain website)

Type of visitor	No of visitors	% of visitor population
Overseas	31.9 million	21.8%
UK resident - holiday of one night or more	52.0 million	35.6%
UK resident - overnight business trips	18.2 million	12.4%
UK resident - overnight trips to visit friends or family	44.1 million	30.2%

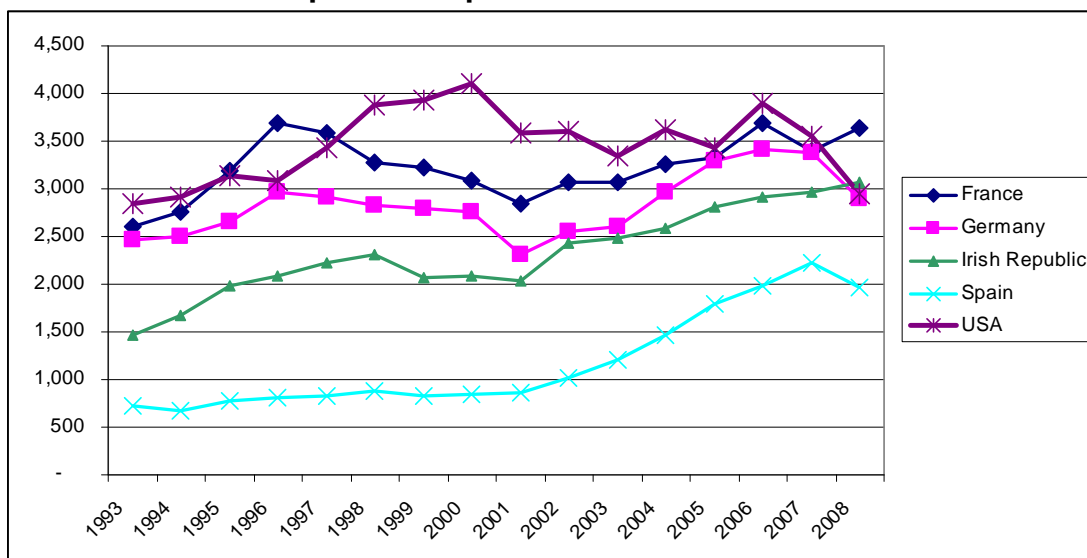
Visitor expenditure 2008	
Type of visitor	Total amount spent
Overseas visitors	16.3 billion
UK residents - holiday of one night or more	11.4 billion
UK residents - overnight business trips	4.5 billion
UK residents - overnight trips to visit friends or family	4.8 billion

The International Visitor (source visit britain website)

- 31.9 million visitors came to UK in 2008 from abroad – this was the first decline in visitor numbers since 2001. A decline of 2.7% from 2007.
- The largest number of these visitors came from Europe (23,536,000), followed by North America (3,806,000), Asia (1,466,000) and Australasia (1,164,000). The steepest decline is from visitors from North America.
- In 2008 the UK ranked seventh in international tourism earnings league (down from sixth in 2007) behind USA, Spain, France, Italy, China and Germany. France is the top source country for inbound trips to England although the United States is top for overall spend.

Top 5 countries for no of trips	Number of trips (000s)	Top 5 countries for spend	Spend (£million)
France	3,636	USA	£2,223
Irish Republic	3,070	Germany	£1,125
USA	2,950	France	£1,053
Germany	2,900	Irish Republic	£983
Spain	1,974	Spain	£815

No of trips from top inbound markets since 1993



We can see that the number of trips to the UK from USA, Spain and Germany has fallen in 2008. The no of trips to the UK from the Republic of Ireland and France has increased from 2007.

The UK Tourist (source: The UK Tourist Report and Enjoy England fact book)

- There has been an overall decline in domestic tourism in the UK during 2008 compared to 2006 and 2007. (page 5)
- Domestic trip taking has declined by almost 5% since 2007 – but ‘unlike in previous years, there is less evidence of a shift to overseas tourism’ – this has also decreased by 1%. (page 8)
- The average trip length is 3.2 nights. (page 5)
- People aged 35 – 54 account for 2 in 5 overnight trips to England. (page11)
- The majority of domestic trip takers in England do not have children in their household. (page 13)

2. Regional Occupancy Data 2009

(source South West Tourism Occupancy data from serviced accommodation from Jan – Nov 2009)

South West Serviced Accommodation Room Occupancy%			
	% 2008	% 2009	% change 2008/2009
January	36	34	-2
February	48	43	-5
March	50	47	-3
April	55	56	+1
May	63	63	=
June	66	68	+2
July	72	73	+1
August	74	78	+4
September	68	73	+5
October	57	60	+3
November	45	46	+1
December	40		

- At the start of the year there was a decline in room occupancy percentage but from April every month except May (which saw the % remain the same) saw an increase in room occupancy.

3. Visitors to Dorset & the South West

	Christchurch	East Dorset	North Dorset	Purbeck	West Dorset	Weymouth and Portland	Bournemouth h/Poole	DCC Dorset	Dorset total
Staying visitors	195,000	308,000	206,000	444,000	725,700	478,800	1,354,000	2,357,500	3,711,500
Staying visitor nights	838,000	1,214,000	788,000	1,909,000	3,102,400	1,851,400	5,508,000	9,702,800	15,210,800
Average no of nights per staying visitor	4.3	3.9	3.8	4.3	4.3	3.9	4.0	4.1	4.1
Spend by staying visitor	£35,176,000	£41,965,000	£30,362,000	£80,440,000	£136,936,000	£93,785,000	£272,777,000	£418,664,000	£691,441,000
Average spend per staying visitor	£180.40	£136.30	£147.40	£181.20	£188.70	£196.20	£201.46	£177.59	£186.30
Average spend per staying visitor per day	£42.00	£34.90	£38.80	£42.10	£43.90	£50.30	£50.40	£43.30	£46.60
Day visitors	827,473	1,443,000	1,087,000	1,734,000	2,750,000	1,024,000	5,496,602	8,865,473	14,362,075
Spend by day visitor	£46,665,000	£59,034,000	£44,528,000	£66,055,000	£113,182,000	£55,121,000	£248,351,508	£384,585,000	£632,936,508
Average spend per day visitor	£56.40	£40.90	£41.00	£38.10	£41.20	£53.80	£45.18	£43.38	£44.10
Other tourism related spend	£4,665,000	£7,805,000	£6,294,000	£4,920,000	£9,380,000	£7,769,000	£31,341,000	£40,833,000	£72,174,000
Jobs relating to tourism spending	1,860	2,443	1,965	3,309	6,335	4,480	13,878	20,392	34,270
% of employment supported by tourism	10%	6%	6%	13%	14%	14%	*	*	*

(source: South West Tourism : Value of Tourism 2007)

Data shaded in blue have been calculated by MRG all other data in this table is from South West Tourism's Value of Tourism report 2007

- 16% of staying visitors to the South West region stayed in Dorset.
- 14% of people visiting the South West Region on a day trip visited Dorset.
- 91.7% of staying trips to Dorset are from UK residents 8.3% from overseas visitors.
- 80% of the total staying visitor spend comes from UK tourists, with 20% from overseas visitors.

4. Dorset Visitors profile

(source: Dorset New Forest Tourism Partnership visitor survey 2009)

- 23% of visitors were on a day trip whilst 77% were staying in the area.
- Visitors choose Dorset because they particularly like the area or were touring the area.
- 89% of the visitors were from the UK, 11% were from abroad.
- 30% of UK visitors were from the South East, 28% from the South West.
- 51% of visitors were in a group of 2 adults, 28% were in a family group with children.
- 79% of visitors had visited the area before, 30% visit more than once a year.
- Visitors travelled an average of 268 miles to visit the area.
- The top three activities visitors take part in during their visit to Dorset were 'walking' (80%), 'exploring towns and villages' (67%) and 'shopping' (64%).
- The top three visitor motivations for visiting the area were 'seaside, beaches and coast' (22%), 'visited the area before and liked it' (18%) and 'visiting friends and family' (16%).
- When asked what is most important to you when looking for a day out "to experience fascinating, beautiful or awe-inspiring places" was the most popular answer (33%) followed by "A relaxing, social day out with friends and family" (29%).

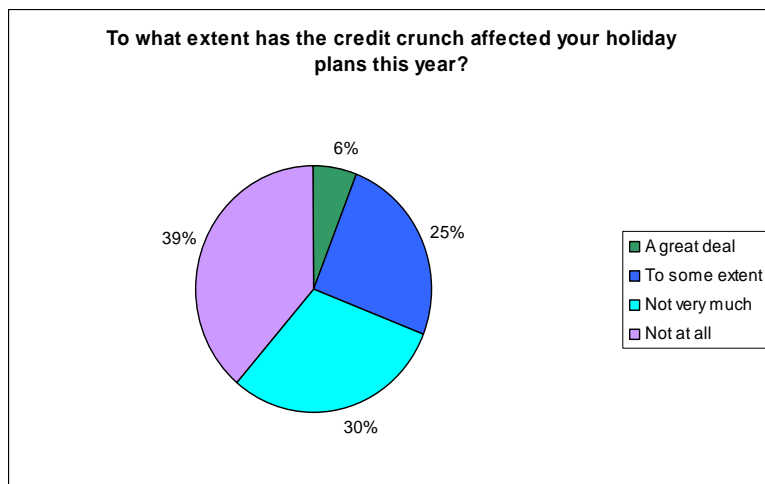
5. Emerging themes and trends

a) Credit Crunch and Tourism

(Source: The Economic Downturn and Domestic Tourism December 2008
Conducted by Olive insight for Visit Britain.)

Of respondents to a Visit Britain study who said they have either cut back or are planning to cut back on spending due to the economic downturn 45 % said they are cutting back on their holidays.

- 30% are not taking any or are taking less holidays,
- 20% spent or are going to spend less and
- 17% are changing their holiday plans.



When Dorset visitors were asked to what extent the credit crunch had affected their holiday plans for this year just under a third said that it had affected their plan a great deal or to some extent. 39% said it hadn't affected their plans and 30% said it hadn't affected their plans much at all.

b) Valuing the day visitor (source: Tourism Insights)

Over 50% of tourism revenue in the UK comes from the day visitor (45.4 billion) is from day visitors spending more than four hours outside of their usual environment.

Data from the UK tourism survey suggests the number of people holidaying at home in 2009 has increased, spending on accommodation has fallen, families are reducing their expenditure on high costs of accommodation and meals. "The day visitor market should, therefore be of significant importance to companies and destinations in the current economic climate".

c) Travel Trends report 2010 ABTA The Travel Association

- Figures from enjoy England suggested that trips taken by Brits in the whole of the UK were up by 32% in the month of July 2009.
- Tour operators specialising in cottages, camping and caravanning reported a successful year in 2009.
- There has been a push in activity breaks for 2010 and leisure bookings for 2010 show positive growth.
- Euro monitor predict that the UK maybe be the centre of a pop-up hotel revolution. These are temporary accommodation units that can be constructed and taken down quickly and cheaply. They can be used wherever demand becomes great – a big sporting event like the Olympics.

d) Camping & Caravanning (source: Tourism Insights report January 2010)

- Camping & Caravanning Club (CCC) recorded an 8% increase in bookings 2009. The Club states that it is cash-strapped young families who are fuelling the boom.
- Spend in this area has risen less suggesting pressure on budgets
- Sector is benefitting from a change in perception; with improved facilities and celebrity links, is seen as more fashionable, tapping into desire to experience outdoor living.