Tourism in Dorset

An overview of the importance and economic contribution of the visitor economy in Dorset

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On behalf of;

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Introduction

Dorset is a beautiful county with stunning coastline, attractive rural landscape and villages and some of the best resorts in the country. It also has a successful tourism industry that capitalises on these natural resources and has developed an infrastructure of visitor accommodation, attractions, activities and events that can also draw on the rich cultural heritage of the County. Tourism is a leading contributor to the overall economic well-being of Dorset; it sustains and supports a significant number of jobs.

"Tourism is the act of travelling to, and staying in, places outside one's usual environment for leisure, business and other purposes. Tourism includes day visits using the same criteria."

Tourism includes business tourism, social visitors staying for a function and day visitors i.e. anyone undertaking an activity that is not in their normal routine. These are important markets for Dorset but not always recognised as tourism.

"The visitor economy covers all aspects of the economy related directly or indirectly through the supply chain to the provision of services to visitors and benefitting from their spending."

The visitor economy is a more inclusive concept than tourism, involving a wider range of activities and embracing the total visitor experience including the 'sense of place'. It depends upon public bodies and voluntary groups as well as private sector businesses. The visitor economy has an interdependent relationship with a range of sectors including transport, retailing, catering, culture, heritage and entertainment, amongst others.

The importance of these definitions for Dorset is the recognition that the visitor economy is large and diverse including not only hotels and traditional tourist attractions but a range of local services and providers from transport to toilets, from the local cafe serving a visitor to the florist supplying a wedding venue.

Tourism and the wider visitor economy can – and does - contribute significantly to local prosperity and quality of life in Dorset.

The visitor economy is important in generating income and jobs in rural areas and in town centres where leisure uses also play an important role in maintaining the vitality and vibrancy of High Streets. (1)

The importance of tourism to the county is clear and in 2014 it attracted approximately 3.4m staying visitors and 25.5m day visitors generating a total business turnover of £2.5b and an estimated 47,000 actual jobs, or 13% of all employment, supported by tourism activity.(2)

Within the South West region Dorset accounts for 16% of all domestic staying trips, 15% of all overseas staying trips and 17% of tourism day visits.(2)

1. **Source - Dorset Destination Management Plan 2014-2018 – The Tourism Company**
2. **Source - The Economic Impact of Dorset's Visitor Economy 2014 – The South West Research Company (TSWRC) Nov 15**

Measuring tourism and data sources

At the outset, it should be stated that no data sources are infallible, particularly for tourism. Surveys are subject to statistical error; Standard Industrial Classifications, or SIC codes as they are commonly known, were not created for eclectic areas of activity such as tourism; mathematical models are estimates.

Tourism is not an industry in the conventional sense of the word. The tourism product is not simply created out of a conventional production process. Rather, the tourism industry serves our needs while we are away from our 'usual environment' by providing a wide range of products and services. Hence, tourism-related businesses are situated in and provide employment across a wide range of occupations and industrial sectors. It is through this process that tourism provides income for local households, businesses and suppliers and has an impact on the regional, sub-regional and district economies. As an industry sector, Tourism cannot be defined in the same way as agriculture or transport but its collective economic and social importance and its responsiveness to positive and negative interventions justifies the comprehensive evidence base and analysis it has been afforded within this document.

A range of data sources are available with which tourism activity in an area can be measured all of which have benefits and limitations. The main data sources used to display tourism statistics within this chapter are summarised below. The Cambridge Model is the primary source of data utilised for this chapter although other data sources are displayed for comparative/context purposes where meaningful. The Cambridge Model data is the only source that allows for complete single year data to be displayed, trends to be analysed and produces employment and GVA estimates based upon a single year.

It should be noted that all tourism spend data from the national tourism surveys and subsequent data modelled through the Cambridge Model has not been adjusted to account for inflation.

The Cambridge Model - The Cambridge Economic Impact Model is operated under license by TSWRC. The model utilises information from national tourism surveys and regionally/locally based data. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level. The model uses local data to adjust national survey data and reduce the potential impacts of small sample sizes and as a result single year data is available through this method. The model has been widely used in both the South West and across areas of England for a number of years.

The Model in its basic form relies on using information from a range of sources. The methodology and accuracy of these sources varies and therefore the estimates can only be regarded as indicative of the scale and importance of visitor activity in the local area. Thus the Model cannot take account of any leakage of expenditure in and out of the local area from tourists taking day trips in or out of the area in which they are staying. While it is assumed that these may broadly balance each other in many areas there will be an underestimate in relation to overseas day visits from holiday accommodation in London to locations receiving significant numbers from that source.

Great Britain Tourism Survey (GBTS) - The Great Britain Tourism Survey is undertaken by TNS for VisitEngland and partners and is based on approximately 2,000 face-to-face interviews per week throughout the year as part of TNS's RSGB Omnibus survey. It provides basic headline data on the volume and value of domestic tourism, for England as a whole, for the English regions and for the counties or unitary authorities. It should be noted that published outputs below a regional level are displayed as three year averages due to small samples in some areas. Whilst this method provides a stable indication of domestic tourism activity over time the nature of using averages below a regional level means that any changes are softened and a particularly good or poor year's data influences the outputs for a number of years.

International Passenger Survey (IPS) - The International Passenger Survey is conducted by Office for National Statistics and is based on face-to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland. Around 0.2% of all travellers are interviewed, with approximately 55,000 interviews of overseas visitors obtained throughout the year. IPS provides headline figures, based on the county or unitary authority, for the volume and value of overseas trips to the UK although sample warnings provided with the data at this level.

Great Britain Day Visits Survey (GBDVS) - In 2011, VisitEngland, Visit Scotland and Visit Wales commissioned a new survey to measure volume and value of tourism day visits in England. A number of earlier surveys were conducted to measure this key sector of the economy, most recently in 2005, but it has been difficult to make comparisons over time due to changing definitions and survey methodologies. In the new survey, interviewing is carried out weekly, using an online methodology, and an annual sample of over 38,000 interviews with GB adults. The GB Day Visits Survey is an Official Statistic, and is produced in adherence with the Code of Practice for Official Statistics (2009). Data is published at a national, regional, county and local authority level. County and local authority data is again published as three year averages due to potentially small sample sizes.

The Dorset tourism product

The tourism product in Dorset is diverse and offers a wide range of attractions for visitors and residents alike. 44% of the county is a designated Area of Outstanding Natural Beauty, it contains the large majority of the Jurassic Coast World Heritage site, part of the South West Coast Path runs along the length of the county from West Dorset to Poole Harbour and there are a wide range of towns, picturesque villages and resorts to offer something for everyone to enjoy.

The tourism product was summarised as below in the 2014-2018 Destination Management Plan, commissioned by the Dorset LEP;

Dorset includes some of the most attractive rural and coastal product in the country with one of the country's premier resort destinations. The County is reasonably accessible by road and rail from London and the South East, although the road and public transport network within Dorset, notably to the north and east, has severe limitations. This impacts on the potential for greater integration between the markets of the SE Dorset conurbation and the rural north and west of the County. The gateways provided by Bournemouth airport and the cruise ports at Poole and Portland offer special opportunities for tourism. Bournemouth is a high quality family resort with a large stock of accommodation and the international conference centre. Poole and Weymouth are centres of national/international importance for all things to do with maritime tourism and recognised as such within the special interest markets.

Dorset has some exceptional rural and coastal landscape including the Jurassic Coast World Heritage Site and the wider AONB. This is complemented by a number of coastal and rural market towns and attractive villages providing a range of services as well as heritage interest.

There are nearly 7,500 serviced rooms in 120 establishments of 20+ rooms located around the County and around 10,000 additional serviced rooms in around 1,100 smaller establishments (<20 rooms). This is a relatively large volume of accommodation but it is concentrated in Bournemouth (56% of the larger establishments and 29% of all rooms). There is also a shortage of high quality and branded accommodation which is a constraint in a number of valuable markets. The range and type of accommodation is a factor in the performance of local hotels, with room occupancy significantly below the England average.

In the self-catering sector, there are over 1,500 holiday dwellings and 137 camping/ caravan sites with 15,000 bedspaces in the former and 110,000 in the latter. Generally, the self-catering sector (holiday dwellings and caravan sites) is seen as being of excellent quality overall with a number of high quality sites.

The County has some notable attractions including heritage sites, a large number of small museums, family attractions and outdoor recreation sites. Most are located in West Dorset, Purbeck and Poole. There is a perception that there is a shortage of wet-weather attractions and the majority are rural based; Bournemouth, for example, has relatively few attractions.

Dorset is a cultural hot-spot, with some major venues, a large number of events and festivals (sporting, artistic, food, heritage etc.), historic literary connections and resident artists of all sorts and has been the location for a large number of international films. Notwithstanding the large number and variety of events, there is a view that they could play a bigger role in drawing in more visitors if better coordinated and promoted.

The County has a growing reputation for its food offer, including local producers, markets, retail outlets, personalities, festivals, and some excellent restaurants.

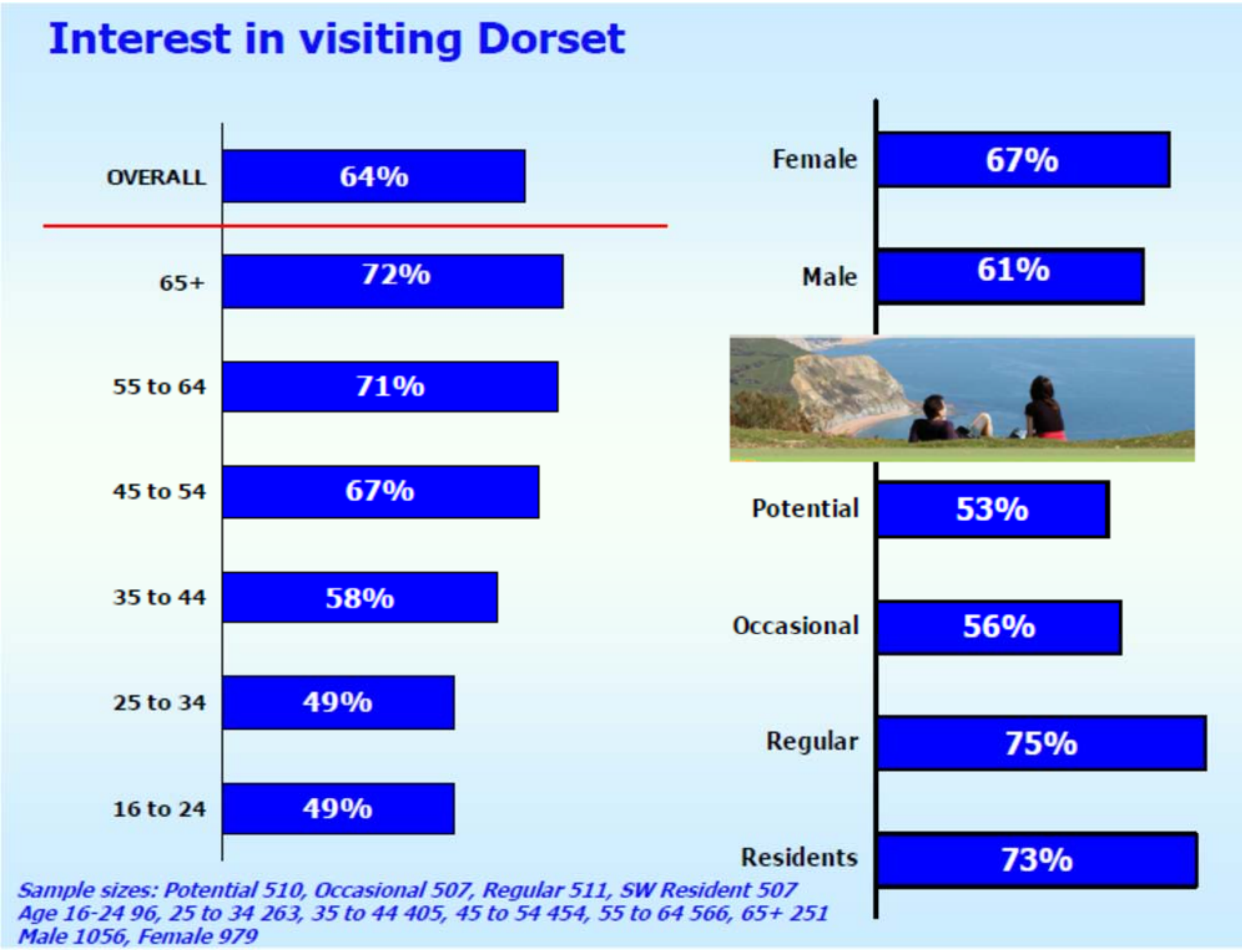
Brand research commissioned by South West Tourism in 2010 (South West Tourism Destination & Experience Brands Research) confirmed the uniqueness of the county, consumer interest in visiting and concluded that;

Dorset was found to have unique perceptions and characteristics, separate to those of neighbouring counties/areas.

The leading associations with Dorset chosen from a list of 21 attributes as part of the Brand Research were;

Associations with Dorset			
Beautiful/scenic	70%	Good beaches	58%
Cottages	67%	Friendly/welcoming	55%
Quaint villages	67%	Good heritage (museums, houses, gardens, etc.)	48%
Good countryside	67%	Good restaurants/food	47%
Good places to walk	64%	Olde-worlde / old-fashioned	46%
Good for older people to visit	63%	Historic	45%
A relaxing place	59%	Good weather	41%

Interest in visiting the county was high amongst respondents of the Brand Research as shown in the charts below;



The research conducted for the Dorset Management Plan 2014-2018 summarised the strength of the Dorset brand and key words named by survey respondents as below;

The brand values are complex with a number of specific, positive attributes:

- ***The dramatic coast and unspoilt 'traditional' countryside;***
- ***Superb beaches and water-based activities;***
- ***Heritage towns;***
- ***Food and drink; and***
- ***Arts and culture.***

The document also provided a SWOT analysis of the tourism product in the county;

In brief, the main strengths of Dorset as a visitor destination are its access to a large market, the excellent natural resources of the coast and rural hinterland, the towns and resorts, the local arts, culture and food offer and the range of attractions and activities. The County has a relatively low profile as a destination but the main weakness is the lack of appreciation of, and commitment to exploit, the potential that exists.

The full SWOT analysis is provided on the following page and should be considered when developing plans to enhance the tourism product in the county, or raise awareness of it, to ultimately increase visitor numbers and expenditure.

STRENGTHS	WEAKNESSES
• Access for large catchment population • Bournemouth, a major family resort • Unique water sports environment • Attractive small towns and villages • Designated coast line and rural areas • High quality beaches • Network of walking routes/trails including coast path • Cultural heritage: music, visual arts and crafts, literature, film, entertainment • Number and range of events • Range of attractions and museums • Range of accommodation • High quality self-catering • BIC and other venues • Local food and drink • Independent shopping • Strong financial commitment from some local authorities to tourism • Mild climate vs UK average • Local tourism educational institutions	• Lack of co-ordination and collaboration amongst stakeholders; no strong voice • Marketing of, and PR for, the County limited by boundaries and resources • Dependence on repeat, older visitors • Lack of resources/commitment to tourism in some districts • Low profile of the County/ lack of brand awareness in comparison to Devon and Cornwall • Lack of indoor attractions, particularly for adults • Inconsistent quality, notably in serviced accommodation sector • Poor east–west and internal communications • Poor signage • Road structure/congestion • Limited public transport system • Lack of coordination on information, infrastructure, events etc.
OPPORTUNITIES	**THREATS**
• Potentially strong Dorset that can supplement the promotion of individual destinations • Ongoing national revival in coastal tourism • Growing interest in outdoor activity, particularly water sports, walking, cycling and other events • Appetite for closer collaboration • Bournemouth airport and ports • Growth in cruise market • Growing awareness and confidence in the current cultural offer • Interest in local products and food	• Ongoing lack of understanding of potential economic benefits of tourism • Cutbacks in public and external funding • Macro-economic circumstances • Not adjusting to changing markets and their related demands • Ongoing lack of co-ordination between stakeholders • Increased competition, particularly in short break and business tourism destinations • Lack of take up of skills training • Pressures on the natural environment • Weak communication and awareness of vision, plan and targets

In addition, the county also has a strong appeal to overseas study students, particularly in the Bournemouth/Poole area, and in 2014 Dorset attracted the highest number of overseas study trips amongst all of the South West counties (25,000 trips). Previous research conducted by TSWRC directly with language schools in Thanet (Economic Impact of Language Schools/EFL Providers 2013) suggested that the importance of this sector was potentially understated through the IPS survey and traditional modelling methods and the distribution of study expenditure and subsequent related employment was not fully captured. It is possible that this may also be the case in Dorset although further research would be required in this area to fully understand this.

Dorset tourism key facts

Source - The Economic Impact of Dorset's Visitor Economy 2014 – The South West Research Company

The key tourism facts for Dorset calculated using the Cambridge Model for 2014, the latest year currently available, are summarised in the table below. Other data sources for visitor statistics are displayed within the visitor trends section of this chapter along with the reasons for any differentials in volume and value estimates.

Dorset 2014 key facts	
3,434,000	Staying visitor trips
14,774,000	Staying visitor nights
£864,419,000	Staying visitor spend
25,530,000	Day visits
£870,750,000	Day visitor spend
£1,735,169,000	Direct visitor spend
£51,559,000	Other related spend
£1,786,728,000	TOTAL VISITOR RELATED SPEND
£2,518,681,000	TOTAL BUSINESS TURNOVER SUPPORTED
47,000	Estimated actual employment
35,000	FTE employment
13%	Proportion of all employment
£1,404,226,000	Estimated GVA

The importance of tourism to the county is clear from the figures above with a total business turnover of £2.5b and an estimated 47,000 actual jobs or 13% of all employment supported by tourism activity in 2014. This was generated by visitor expenditure from 3.4m staying and 25.5m day visitors.

Information on the breakdown of visitor spending is available from the three main tourism surveys by type of visitor. The Model divides the expenditure between five sectors:

- Accommodation
- Shopping for gifts, clothes and other goods
- Eating and drinking in restaurants, cafes and inns
- Entry to attractions, entertainment and hire of goods and services
- Transport and travel costs including public transport, purchase of fuel and parking

By applying the expenditure breakdown to the estimates of visitor spending the Model generates estimates of total spending by the five business sectors. Visitor expenditure in each sector represents additional turnover for businesses in those sectors. However, evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover. In particular, some expenditure on food and drink actually takes place in inns and hotels that fall into the accommodation sector and at attractions. The turnover for each business sector has therefore been adjusted to take account of these marginal changes. More significantly, expenditure on travel costs associated with individual trips is as likely to take place at the origin of the trip as it is at the actual destination. It is therefore assumed that only 60% of total travel expenditure accrues to the destination area.

The table to follow shows the estimated distribution of direct visitor expenditure in the county and the sectors it falls within. Whilst it is commonplace for people to naturally associate the accommodation and attractions sectors with the tourism industry in Dorset these sectors only account for a combined 29% of all visitor spend. Individually, the food and drink (34%) and retail sectors (20%) receive the largest proportions of direct visitor spend. The overall expenditure contributions of day and staying visitors are equally split.

Dorset 2014 - Distribution of visitor spend							
	Accommodation	**Retail**	**Food and drink**	**Attractions/entertainment**	**Travel**	**Total**	**%**
UK Tourists	£256,381,000	£86,057,000	£151,035,000	£73,390,000	£114,792,000	£681,655,000	39%
Overseas tourists	£52,905,000	£53,041,000	£37,242,000	£23,224,000	£16,347,000	£182,759,000	11%
Tourist day visitors	£0	£211,883,000	£395,727,000	£100,151,000	£162,989,000	£870,750,000	50%
Total	£309,286,000	£350,981,000	£584,004,000	£196,765,000	£294,128,000	£1,735,164,000	
%	18%	20%	34%	11%	17%		

In addition to the direct visitor expenditure additional visitor related expenditure arises from;

- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay with them.

This generated a further £51.6 million in Dorset giving a total visitor related spend of approximately £1.8 billion in 2014.

The impacts of visitor related spend are felt beyond just those businesses receiving it. Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending.

Direct visitor related expenditure in Dorset in 2014 provided approximately £1.7 billion pounds business turnover in the county (after reductions to travel and transport spend). The largest proportions of this fell within the Catering and Retail sectors with the majority of their business turnover supported by day visitors to the county.

When the purchase of services locally and spending of wages by employees whose jobs are supported by tourism spending is calculated (supplier and income induced turnover) the total estimated business turnover in Dorset arising as a result of visitor activity is an approximate £2.5 billion pounds as shown in the table below.

Dorset 2014 - Total business turnover supported by tourism activity	
Direct	£1,669,072,000
Supplier and income induced	£849,609,000
Total	£2,518,681,000

Having identified the value of turnover generated by visitor spending in each business sector it is possible to estimate the employment associated with that spending.

The use of visitor expenditure to generate job numbers underestimates the number of jobs arising in the attractions/entertainment sector. The underestimate arises because local authorities and voluntary bodies do not always seek to recoup the full operating costs of individual attractions of facilities from entrance charges. Therefore an additional percentage of direct employment is added to the attractions sector estimates to take account of this factor.

Employment is calculated on three levels;

- **Direct Jobs** - Direct jobs are those in businesses in receipt of visitor spending. For example, jobs supported by visitor spending at a hotel would be direct jobs.
- **Indirect Jobs** - Indirect employment arises as a result of expenditure by businesses in direct receipt of visitor expenditure on the purchase of goods and services for their businesses. For example, some of the employment at a business supplying food and drink may be supported through the supplies that the business sells to hotels (or any other business in direct receipt of visitor expenditure).
- **Induced Jobs** - Induced jobs are those that are supported by the spending of wages by employees in direct and indirect jobs. Such spending will be spread across a wide range of service sectors.

Estimates are shown below for actual jobs and full time equivalent jobs (FTE's).

Dorset 2014 - Total employment supported by tourism activity		
	Estimated actual	**FTE's**
Direct	32,000	22,000
Indirect	9,000	8,000
Induced	7,000	6,000
Total	47,000	35,000

It should be noted that alternative tourism employment estimates are produced from national employment surveys such as the Annual Population Survey (APS). Latest available estimates through these sources are for 2013 to 2014 but they estimate different levels of tourism employment than the Cambridge Model which is primarily due to the use of different methodologies. APS outputs are essentially a count of people employed in certain industries as opposed to the Cambridge method described earlier. One factor is that the APS uses Standard Industrial Classifications to estimate tourism employment, however, whilst tourism will cover the designated classifications it is difficult in some areas to clearly define tourism related employment from that supported by normal residential activity in a sector. For example, APS related estimates include things such as all transportation, betting and gambling and transport renting and leasing which are likely to also be supported by significant residential, non-tourism spend. Crucially, the APS based estimates also do not include any retail employment as being tourism related although the national tourism surveys consistently show a significant proportion of visitor spend taking place in this sector. This is not to pick fault with ONS tourism employment estimates but it is essential that the differences between the methodologies is understood. Indeed, as long as the methodology and industries covered is clearly understood the ONS data actually offers a consistent method, enabling comparisons over time and a much more detailed analysis of employment characteristics in the sector to be undertaken than would be possible using the Cambridge Model.

The latest tourism estimates for 2013 to 2014 (two year average) released by the ONS and derived from the APS estimated that tourism employment accounted for 11.72% of Dorset county employment and 8.51% of employment in Bournemouth and Poole. This would equate to approximately 37,000 actual jobs in the county overall (10% of all employment) compared to the 45,000 estimated through the Cambridge Model (13% of all employment). Whilst the estimates are different, when the overall picture is considered a differential of 3% is not large considering the different methodologies.

The Cambridge Model estimates that tourism contributes approximately £1.4 billion in GVA to the county economy (10% of county GVA) although the calculations within the model are a broad-brush estimate produced in the absence of a wider definition of tourism. The Cambridge Model GVA figures should always be acknowledged as estimates and the methodology used in their calculations is not, and does not claim to be, as sophisticated as the approaches used elsewhere. The calculation built into the Cambridge model takes figures of business turnover arising from direct visitor spend for the accommodation, retail, catering, attractions and transport sectors as well as non-trip related revenue and supplier and income induced turnover and then applies GVA ratio's to these derived from the South West Business Information Model 1999 to produce its' estimates.

By way of comparison the 2011 ONS Tourism Satellite Account estimated a Tourism Direct GVA figure of £0.66 billion for the county (£0.22bn Bournemouth and £0.44bn Dorset – 5% of county GVA). This figure is the result of a far more complex and reliable calculation than that of the Cambridge Model but will be based upon the same industry sectors defined as 'tourism' as were used for the ONS tourism employment estimates discussed earlier in this chapter.

Visitor trends

This section looks at visitor statistics and trends in that data for the period of 2011 to 2014 as there is stability in the methodologies of the national tourism surveys for this period, making comparisons possible. As previously discussed, there are different data sources available from which to gather Dorset visitor data and the key ones are displayed in the following tables for comparison purposes.

Source - Cambridge Model

UK staying visitors	Trips	Year on year change	Nights	Year on year change	Spend	Year on year change
2011	3,251,000		11,401,000		£568,000,000	
2012	3,149,000	-3%	11,859,000	4%	£607,000,000	7%
2013	3,117,000	-1%	11,459,000	-3%	£649,000,000	7%
2014	3,098,000	-1%	11,705,000	2%	£681,660,000	5%
Change from base year	-5%		3%		20%	

Source - GBTS (3 year average)

UK staying visitors	Trips	Year on year change	Nights	Year on year change	Spend	Year on year change
2009 - 2011	3,208,000		11,298,000		£563,000,000	
2010 - 2012	3,137,000	-2%	11,107,000	-2%	£557,000,000	-1%
2011 - 2013	3,150,000	0%	11,107,000	0%	£605,000,000	9%
2012 - 2014	3,064,000	-3%	11,117,000	0%	£649,660,000	7%
Change from base year	-4%		-2%		15%	

Comparing the two data sources for UK staying visitors to Dorset is not possible due to one source being single year data and the other being a three year average. However, the changes shown from the base year are broadly similar for both sets of outputs with the exception of visitor nights.

Single year outputs from the Cambridge Model estimate that in 2014 approximately 3.1m UK staying visitor trips were made to Dorset accounting for 11.1m visitor nights in the county and contributing approximately £650m in direct visitor expenditure to the county economy.

Cambridge Model data estimates that in 2014 Bournemouth accounted for 28% of all UK staying trips to the county, 23% of all UK staying visitor nights and 29% of all UK staying visitor spend clearly underlining the importance of the resort to the county's visitor economy overall.

The trends shown in the Cambridge Model data suggest that UK staying visitor trips have seen year on year decreases since 2011 and a 5% decrease over the analysis period. However, volumes of UK visitor nights witnessed increases in 2012 and 2014 and an overall increase of 3% for the analysis period indicating an increasing length of stay in the county. UK staying visitor spend witnessed year on year increases and an increase of 20% overall for the analysis period.

Overseas staying visitor data for Dorset is displayed in the tables below.

Source - Cambridge Model

Overseas staying visitors	Trips	Year on year change	Nights	Year on year change	Spend	Year on year change
2011	333,000	1%	2,929,000	6%	£188,704,000	32%
2012	373,000	12%	3,432,000	17%	£200,359,000	6%
2013	356,000	-5%	3,077,000	-10%	£176,917,000	-12%
2014	336,000	-6%	3,069,000	0%	£182,759,000	3%
Change from base year	1%		5%		-3%	

Source - IPS

Overseas staying visitors	Trips	Year on year change	Nights	Year on year change	Spend	Year on year change
2011	334,000		2,960,000		£190,000,000	
2012	373,000	12%	3,432,000	16%	£200,000,000	5%
2013	352,000	-6%	3,068,000	-11%	£179,000,000	-11%
2014	291,000	-17%	3,069,000	0%	£183,000,000	2%
Change from base year	-13%		4%		-4%	

The two data sources are broadly similar for Overseas visitor nights and spend and also for Overseas trips in all years except 2014 where adjustments were made in the modelling process to account for decreases shown in IPS trips by accommodation data which did not reflect local evidence and was not supported by historical data.

Single year outputs from the Cambridge Model estimate that in 2014 approximately 336 thousand overseas staying visitor trips were made to Dorset accounting for 3.1m visitor nights in the county and contributing approximately £183m in direct visitor expenditure to the county economy.

Cambridge Model data estimates that in 2014 Bournemouth accounted for 42% of all Overseas staying trips to the county, 29% of all Overseas staying visitor nights and 42% of all Overseas staying visitor spend again demonstrating the importance of the resort to the county's visitor economy overall.

The trends shown in the Cambridge Model data suggest that overseas staying visitor trips have seen year on year decreases since the peak Olympic year of 2012 although overall remain relatively stable with a 1% decrease over the analysis period. Overseas visitor nights witnessed increases in 2011 and 2012 before decreasing on 2013, in line with overseas trips, and remained at a similar level in 2014. There was an overall increase of 5% for the analysis period indicating an increasing length of stay in the county. In a similar manner to trips and nights, overseas staying visitor spend witnessed increases in 2011 and 2012 before decreasing in 2013 although increased again in 2014 (+3%). Overall Overseas spend is estimated to have decreased by 3% over the analysis period although is comparing to a reasonably high base year in 2011.

Data for all staying visitors to Dorset is displayed in the table below.

Source - Cambridge Model

All staying visitors	Trips	Year on year change	Nights	Year on year change	Spend	Year on year change
2011	3,584,000		14,330,000		£756,704,000	
2012	3,522,000	-2%	15,291,000	7%	£807,359,000	7%
2013	3,473,000	-1%	14,536,000	-5%	£825,917,000	2%
2014	3,434,000	-1%	14,774,000	2%	£864,419,000	5%
Change from base year	-4%		3%		14%	

Due to the national surveys issuing a mix of both single year and three year average data the Cambridge Model figures offer the only opportunity to look at all staying visits combined.

Single year outputs from the Cambridge Model estimate that in 2014 approximately 3.4m staying visitor trips were made to Dorset accounting for 14.8m visitor nights in the county and contributing approximately £864m in direct visitor expenditure to the county economy.

Cambridge Model data estimates that in 2014 Bournemouth accounted for 30% of all staying trips to the county, 26% of all staying visitor nights and 32% of all staying visitor spend.

The trends shown in the Cambridge Model data suggest that whilst there have been year on year decreases in staying visitor trips to the county these were relatively small and represented a 4% decrease for the analysis period overall. However, whilst trips decreased visitor nights increased by 3% overall and as a result visitor spend also increased by 14% for the analysis period.

Overall, the performance of the county with regards to staying visitors should be viewed positively over a difficult period for the tourism industry in which a number of factors such as the economy, spells of extreme weather and changes in the regulations regarding taking children out of school during term time have all appeared to have impacted upon tourism levels. Whilst not yet available at a county level, staying visitor estimates for 2015 appear to be very positive at the time of this report and it would be reasonable to expect the overall decrease in visitor trips to be reversed from what is currently known.

Data for day visitors to Dorset is displayed in the tables below.

Source - Cambridge Model

Day visitors	Trips	Year on year change	Spend	Year on year change
2011	23,531,000		£748,603,000	
2012	26,640,000	13%	£842,900,000	13%
2013	26,300,000	-1%	£887,637,000	5%
2014	25,530,000	-3%	£870,750,000	-2%
Change from base year	8%		16%	

Source - GBDVS (average data)

Day visitors	Trips	Year on year change	Spend	Year on year change
2011 (single year)	12,760,000		£615,940,000	
2011 - 2012	11,220,000	-12%	£487,500,000	-21%
2011 - 2013	17,100,000	52%	£569,200,000	17%
2012 - 2014	20,360,000	19%	£619,920,000	9%
Change from base year	60%		1%	

Source - GBDVS (single year calculated)

Day visitors	Trips	Year on year change	Spend	Year on year change
2011	12,760,000		£615,940,000	
2012	9,680,000	-24%	£359,060,000	-42%
2013	28,860,000	198%	£732,600,000	104%
2014	22,540,000	-22%	£768,100,000	5%
Change from base year	77%		25%	

Due to single year day visit figures being published by GBDVS in 2011 it is possible to also calculate single year figures for the years following it, however, only average figures have been published in subsequent reports (both sets of data shown in the tables above). The levels of change shown by both sets of GBDVS figures suggest that the data is affected by sampling issues at a county level for Dorset (607 respondents for the 2012 – 2014 average period) with large swings shown in the single year figures which are softened, but still considerable, in the average data. As such, Cambridge Model figures, modelled from a more robust regional GBDVS single year figure, represent the best measure of day visitor activity in Dorset.

In 2014 the Cambridge Model estimated approximately 25.5m tourism day visits were taken in Dorset with a day visitor spend of £871m. Bournemouth accounted for approximately 23% of both day visits and spend within the county.

Day visits are estimated to have increased in 2012, perhaps as a result of additional events during the year such as the Olympics and Diamond Jubilee, but then witnessed decreases in both 2013 and 2014. However, day visit volumes in 2014 were 8% higher than the base year of 2011. Day visitor spend increased in both 2012 and 2013 although decreased slightly in 2014 but was 16% higher than the base year of 2011.

All direct visitor spend (staying plus day visitors) calculated by the Cambridge Model is displayed in the chart below.

Source - Cambridge Model

All visitors	Spend	Year on year change
2011	£1,505,307,000	
2012	£1,650,259,000	10%
2013	£1,713,554,000	4%
2014	£1,735,169,000	1%
Change from base year	15%	

Visitor spend is ultimately the key measure of interest when it comes to determining how the tourism industry is performing in an area and the figures above show that Dorset performance is good with growth of 15% in expenditure between 2011 and 2014, or average annual growth of 5% since 2011. This is in line with the national tourism strategy published by VisitEngland (Strategic Framework for Tourism 2010 – 2020) which targeted growth of 5% per annum including inflation.