Culture, Tourism and Dorset
This is a summary of visitor data from the Evidence Base prepared by the Tourism Company for the Dorset Destination Management Plan 2014. Please note that while the most recent data available have been used, some data precedes the current recession. The full visitor data from the Evidence Base is at *http://www.creativedorset.co.uk/dorset-cultural-tourism-network/*

1 What do we mean? (Source: Culture and Heritage Topic Profile, VisitBritain 2010)

Cultural Tourism includes Built Heritage, Cultural Heritage and Contemporary Culture.
Cultural Heritage includes museums and galleries, theatre, opera and ballet, gardens, pubs, food and drink, sports, royal heritage and researching ancestry.
Contemporary Culture includes bars/clubs, shopping/fashion, modern design, sports, live music events and festivals, films and musicals.

2 Tourism in Great Britain

Volume and Value of Tourism in Great Britain in 2013

- **Overseas Visitors:** 32.813 billion visitors who spent £21.012 billion. France, Germany and USA provide the most visitors and spent the most (Source: ONS International Passenger Survey 2013)
- **Domestic Overnight Visitors:** £102 million overnight trips totalling 297 million nights away, with total spend of £18.7 billion. (Source: Great Britain Tourism Survey 2013)
- **Domestic Day Visitors:** 1588 million tourism day visits with spending of £54 billion. (Source: GB Day Visitor 2013)

Overseas Visitors: Motivation and Activities

- Built heritage and vibrant cities are key motivators for people to visit Britain, with rich cultural heritage and contemporary culture as secondary motivators. (Source: Nation Brands Index 2009)
- Of overseas visitors to the South West, 2006-2011: 69% went shopping, 59% visited parks or gardens, 55% visited famous buildings, 32% visited museums, 7% went to theatres, and 3% visited literary/TV/film locations. (Source: Inbound Tourism to Britain's nations and regions, 2013.)
- Cultural events are not a key reason for visiting but can enhance people's experience once they have decided to visit Britain.

Visitors from within the UK: Activities (Source: The GB Tourist 2012)

- Domestic visits include holiday makers, visiting friends/relatives (VFR) and visitors on business.
- Among the top 25 activities for all domestic visitors are visiting a museum (11th), visiting historic houses, religious buildings, castle, gardens (13th, 14th, 15th, 17th) and visiting an art gallery (25th). Going to the theatre doesn't appear in the top 25 activities.
- VFR and business visitors are more likely to go to the theatre, a live music concert or an art gallery than visitors on holiday.

3 Tourism in Dorset, Bournemouth and Poole (Dorset)

Volume and Value of Visitors in 2012

- **Overseas Staying Visitors** made 373,000 trips (3% of all visits), totalling 3.432 million nights, and spent £200 million (16% of total spend in Dorset). (Source: ONS International Passenger Survey, sub regional analysis, 2012)
- **Domestic Staying Visitors** made 3.137 million trips (21% of all visits), totalling 11.107 million nights, and spent £557 million (45% of total spend) (Source: GBTS Analysis 2006-2012)
- **Domestic Tourism Day Visitors** made 11.22 million trips (76% of all visits) and spent £488 million (39% of total spend). (Source: The GB Day Visitor 2012)

Economic Impact

- **Gross Value Added (GVA)** measures the contribution to the economy of each individual producer, industry or sector. In 2008, tourism was 4% of GVA in Dorset County and 2.99% of GVA in Bournemouth/Poole. This compares with 4.05% of GVA in the South West and 3.47% of GVA in the UK (Source: What is Tourism Worth? Understanding Tourism at the Regional and Sub Regional Level', VisitEngland).

- **Employment:** Tourism employed 42,000 people full and part-time in Dorset in 2009. (Source: What is Tourism Worth? Understanding Tourism at Regional and Sub regional Level, VisitEngland)
- **Dependence on tourism:** In 2009, Weymouth was most dependent on tourism (20% of all employment), then Purbeck (18%), Bournemouth (16%) and Christchurch (14%). (Source: What is Tourism Worth? Understanding Tourism at Regional and Sub regional Level, VisitEngland)
- **Tourism businesses:** In 2011, Dorset's accommodation/food sector had 9% of businesses and 13% of employees, and its arts/entertainment/recreation sector had 7% of businesses and 5% of employees. (Source: Local Economic Assessment for Bournemouth, Dorset and Poole, 2011)

Home Country/Region of Visitors

- **Overseas visitors** came from Germany (19%), Holland (18%), Ireland (9%) and USA, France and Italy (6% each). (Source: Dorset Visitor Survey, 2009 (DVS 2009))
- **Domestic visitors** came from South East (29%), South West (28%), London and West Midlands (8% each), North West, North East and East Midlands (6% each) (Source: DVS 2009)

Purpose of Trips

- **Overseas Visitors:** Of 345 m trips, 43% were for holidays, 38% to VFR, 10% business and 9% other. (Source: International Passenger Survey, ONS, 2009-2011 figures)
- **Domestic Visitors:** Of 3162 trips, 64% were holidays, 28% VFR, 7% business and 1% other. (Source: GBTS, 2009-2011 figures)
- Holiday tourism is proportionally more important in Dorset (62%) than in England as a whole (45%), but VFR (Dorset 29%, England 38%) and business tourism (Dorset 7%, England 15%) are less important. (Sources: Average 2009-11 from International Passenger Survey, ONS; GBTS)

Visitor Demographics

- **Group size:** Most Dorset visitors are in a group of two adults, no children (51%). Families with children are 28% of visitors. (Source: DVS 2009)
- **Age:** Dorset attracts a high number of mature visitors: 68% are 45 years or older, 49% are 55 years or older, only 9% are under 35 years. (Source: DVS 2009)
- **Socio Economic:** There are a higher proportion of A/B visitors off peak (26%) than in summer (18%), and a slightly higher proportion of C1/C2 summer visitors (72%) than off peak (64%) (Source: DVS 2009; Dorset Off-Peak Visitors Survey 2011)

Dorset Visitors: Motivation and Activities

- **The main motivation** for visitors to Dorset is seaside/beaches/coast (21%), previous visit to the area (19% and friends/family in the area (15%) (Source: DVS 2009)
- **The range of motivations** include seaside/beaches/coast and scenery/countryside (62% each), culture/heritage (45%) and an event or festival (21%). (Source: DVS 2009)
- **Top peak season activities** are walking (80%), exploring towns/villages (67%) and shopping (64%). Visiting museums is the top cultural activity (38%) with culture pursuits/theatre at 13%. (Source: DVS 2009)
- **Top off-peak activities** are 'general walking around' (72%), shopping (48%) and exploring villages/towns (44%). Visiting gardens is the top cultural activity (18%), then visiting museums 14%. Cultural pursuits/theatre are at 4%. (Source: Dorset Off Peak Visitor Survey 2011)

4 Key Findings from Dorset Arts Trust Culture and Tourism Scoping Study

- The tourism sector is keen to work with culture to deliver a better visitor experience.
- Dorset Arts Trust's lead in developing culture and tourism is supported by the tourism sector.
- The tourism and cultural sectors are similar: both are mainly small businesses.
- To better understand each other, both sectors need to move towards each other from their current positions in order to find common ground.
- Culture and tourism need to develop a shared language that both can understand.
- The arts and culture sector can appear insular and fragmented to the tourism sector.
- The tourism sector is our greatest ally in promoting the cultural offer to visitors.
- Cultural organisations need to see themselves as part of tourism sector, and see their offer from the visitor's perspective
- Robust evidence collection and analysis is crucial.
- Culture and tourism development needs doers not sayers!