DORCHESTER TOWN COUNCIL
DORCHESTER HERITAGE JOINT COMMITTEE

THE IMPACT OF TOURISM IN DORCHESTER

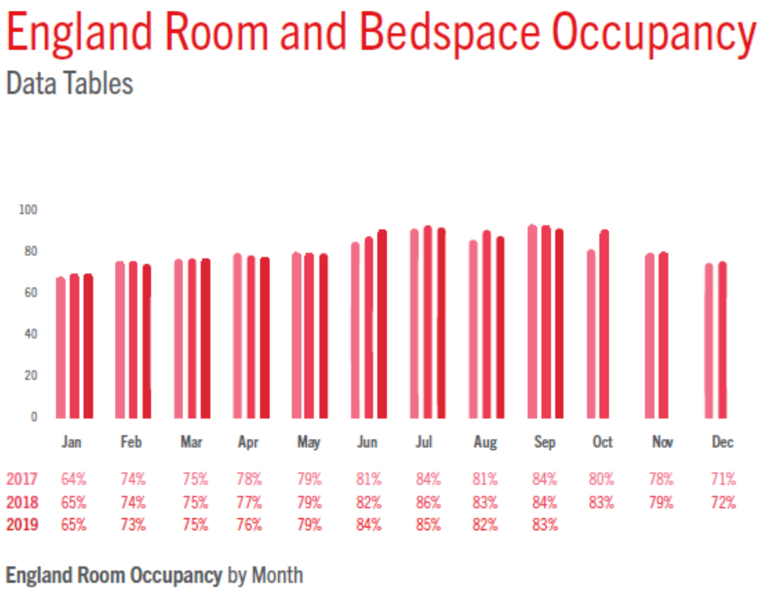
"What do we know from research and studies

<u>WHAT RESEARCH IS AVAILABLE?</u>

<u>At National Level</u>

Visit Britain and Visit England, the national tourism bodies for Britain and England respectively, publish a variety of current and historic reports and studies on their website[1] including volume and value research, occupancy rates, and purpose of trip. By their very nature, the reports are at national and in some cases regional level of granularity and are informed from a number of national surveys[2].

Occupancy levels are published monthly in reports and graphically, the latest at time of writing is reported as follows[3]:



[1] https://www.visitbritain.org/england-research-insights
[2] Great Britain Tourism Survey, International Passenger Survey, GB Day Visits Survey, England Occupancy Survey, Annual Survey of Hours and Earnings, and The Labour Force Survey
[3] https://www.visitbritain.org/accommodation-occupancy-latest-results

While there are no local occupancy records maintained, local accommodation providers indicate that their occupancy closely follow the national picture.
In the GB 2018 Tourist Report[4] published August 2019, and using data the domestic overnight tourism market, there are comparison tables for tourism in England across a number of years. - seen in this extract from the report

Year	2009	2010	2011	2012	2013	20104	2015	2016	2017	2018
Trips (m)	102,249	95,503	104,280	104,458	101,756	92,613	102,730	99,342	100,622	97,397
Nights (m)	310,077	284,992	306,806	310,193	297,199	272,859	299,569	287,702	299,410	295,778
Spend (adj for inflation (£m)	20,724	18,605	20,191	21,397	20,131	19,362	20,911	19,447	19,449	19,347

The report does not comment on the annual fluctuations, other than to observe that 2018 performance is in line with fluctuations over the past 13 years. The Olympics, political uncertainty, global unrest, recession and staycation, Brexit and the exceptional weather in recent years will all have played a part in the fluctuations across the comparison period.

The Office for National Statistics publish, at national level, online a number of reports and time series data sets including inbound visitor numbers and expenditure; UK nationals visits outbound, numbers and expenditure, travel type and destination; UK employment by region, or as primary or secondary employment; UK employment by nationality, and employment estimates by tourism sector[5].

While the national research and studies are important, unfortunately they do not permit robust analysis to town level.

At District Level

From the data gathered in the annual national surveys, it is possible to mathematically deduce the economic impact of tourism through the Cambridge Economic Forecasting model. This model produces an indicative estimate of the volume value and economic impact of tourism at (former) District and County Council or Unitary council levels. Summary analyses are published in early winter for the previous calendar year, produced by The South West Research Company for the Dorset Tourism Partnership, and can be subject to further refinement in subsequent months.

The 2018 data, released in mid-November 2019 and the latest available at time of writing, estimates the following key facts for Tourism for West Dorset[6], earlier years are shown for comparison:

[4] https://www.visitbritain.org/sites/default/files/vb-corporate/40413193-260c_gb_tourist_annual_report_2018_fv-v3.pdf
[5] https://www.ons.gov.uk/search?q=tourism
[6] The Economic Impact/ Value of tourism https://www.visit-dorset.com/trade/research/industry

	2018 (pub 2019)	2017 (pub 2018)	2015 (pub 2016)	2013 (pub 2014)
Staying visitor trips	665,700	685,200	611,800	596,300
Staying visitor nights	2,868,600	3,010,500	2,828,600	2,753,100
Staying visitor spend £ '000's	£151,409	£154,719	£152,480	£145,543
Day visits	4,961,000	5,058,000	4,916,000	5,285,000
Day visitor spend £'000's	£170,395	£171,123	£161,089	£174,406
Direct visitor spend £'000's	£321,804	£325,842	£313,569	£319,949
Other related spend £'000's	£5,671	£5,628	£7,587	£6,698
TOTAL VISITOR RELATED SPEND £'000's	£327,475	£331,470	£321,156	£326,647
Estimated actual employment	6,472	6,906	6499	7260
FTE employment	4,644	4,948	4669	5192
Proportion of all employment	16%	15%	14%	16%

Further details regarding the definitions and the detail can be seen in the original report and its appendices. As an appendix, the report also includes a month by month meteorological and economic impacts review, summarizing the regional and national impacts that may affect consumer confidence and willingness to travel. It is also possible to contrast if required the various former Districts in Dorset, and to compare past years performance.

This research is however empirical and at a greater geography than just the town of Dorchester. It is influenced and affected by the statistical modelling applied, and the significant concentration of bed spaces out of Dorchester and along the Jurassic Coast. It can act as a barometer and comparator for tourism trends locally but should not be considered as a definitive measure.

At County level

From the South West Research Company's annual reports, it is possible to calculate the distribution of staying visitors across Dorset. The Bournemouth Christchurch Poole area receives 43% (3346m) domestic staying visits to Dorset, and 30.7% of overseas visits. This presents a significant opportunity to attract "day visitors" to Dorchester attractions and town centre.

In addition to an amalgamated County wide data set from The South West Research Company's annual reports, the Dorset Tourism Association[7] commissioned a Market Characteristics of Dorset Holiday Visitors[8] report in 2018 from Responsible Hospitality Partnership Ltd. This was informed by post codes data provided by some accommodation and attractions providers. With a caveat that "the sample over-represents caravan and camp sites/holiday parks and under-represents hotels, private rented

[7] See Tourism Structure paper
[8] See https://www.visit-dorset.com/dbimgs/DTA-dorset-market-characteristics-analysis.pdf

accommodation (especially modes favoured by younger customers such as Airbnb) and B&Bs" and noting that post code data for visitors and subsequent analysis was "skewed towards businesses in West Dorset".

The staying visitor analysis from the DTA report and illustrated in the heat map below confirms the reports from local accommodation providers and earlier analysis (from guide distribution) undertaken by West Dorset District Council that Dorset's staying visitors (and by inference therefore Dorchester's visitors) come predominantly from London, South East and the Midlands - an approximate 2.5-3 hours journey time

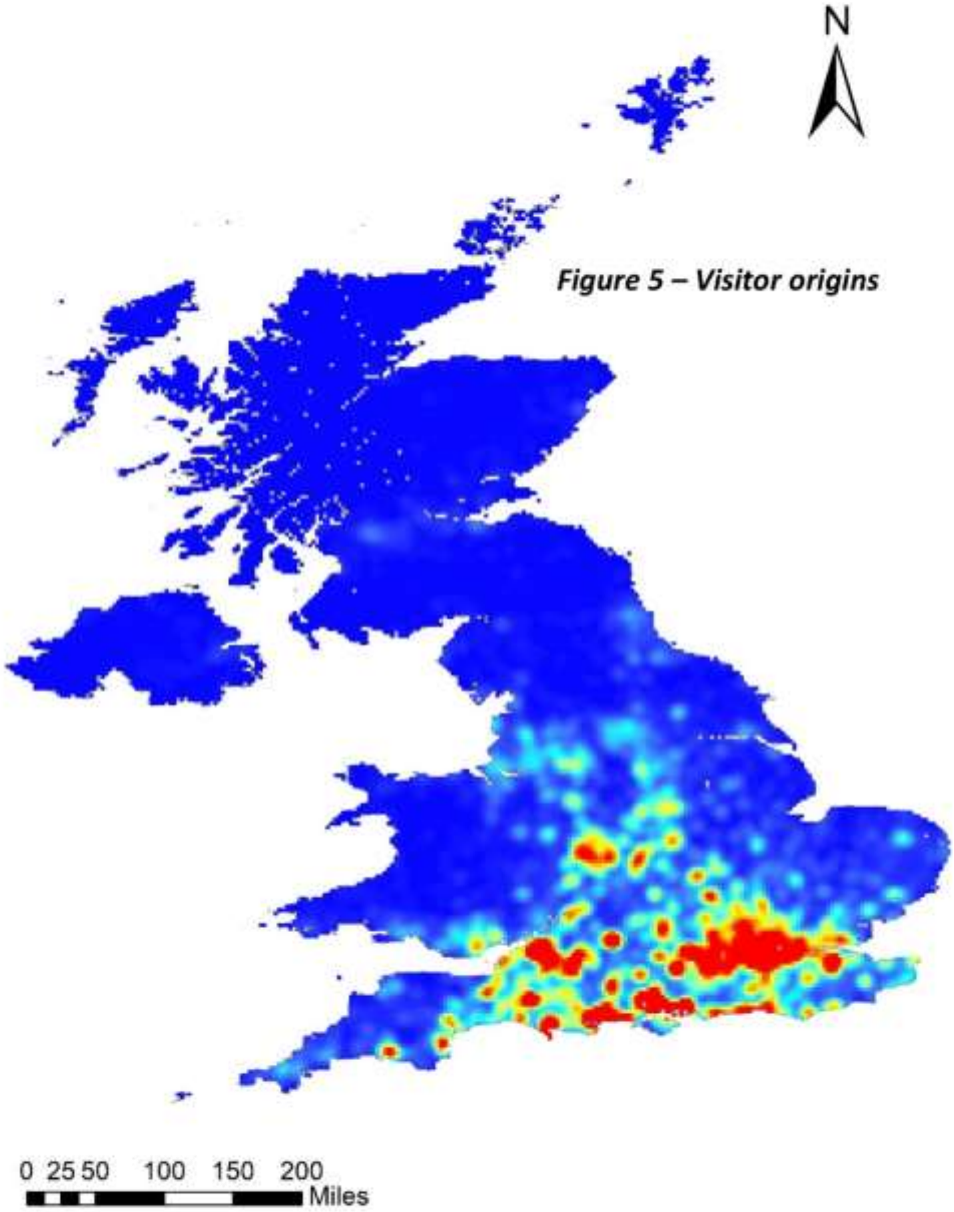


Figure 5 – Visitor origins

The report also analysed the socio-demographic characteristics of the visitors to Dorset, using the visitors home post code data analysed through MOSAIC methodology. This identifies typical characteristics residents by post code based on census and other data, resulting in 15 groups and 66 types, which can be used to describe and individual's behavior.

This market segmentation describes Dorset's visitors as being:

> The relatively affluent Prestige Positions (12%), Country Living (10%) and Domestic Success (13.8%) segments. These segments are prolific holiday and short break takers.
>
> The less affluent aspiring homemakers (11.4%) and suburban stability (7.8%) segments. These groups are less frequent holiday takers and some elements take their main holiday in the UK.
>
> The older and less well-off Senior Security (11.2%) and rural reality (7.8%) segments. These segments typically take one or two shorter holidays per year and tend to favour the UK.

The segmentation groupings are described in more detail in the appendices to the report

There is currently no Dorchester area equivalent local analysis, but discussions with local businesses confirm both the geography and the socio-demography at Dorset level is broadly the same for Dorchester.

At Town Level

In alternate years, The South West Research Company are commissioned by the Dorset Tourism Partnership (now Dorset Council) to apply further modelling in order to produce town summaries. The latest for calendar year 2017[9], published late 2018 together with preceding reports estimate tourism key facts for the town as follows:

	2017	2015	2013
Staying visitor tips '000s	54	54	47
Day visits '000s	732	719	772
Direct visitor spend £m	39.5	41	36.4
Visitor related spend £m	40.3	42.2	37.4
Actual jobs supported by related visitor spend	900	930	900

Again, details regarding the definitions of the data categories can be seen in the appendix to the Economic Impact of Dorset 's Visitor Economy study.

Looking at the Dorchester data, it suggests the variance seen across years may be due in part to the quality and quantity of source data from which the derivations are made. Reduced staying visitor numbers (and increased day visitor numbers) may have been the result of the impact of the end of the recession and increase in staycation. The exceptional weather in summer months in recent years will have affected numbers of day visitors to attractions in the town, while the winter extremes such as the Beast from the East in 2018 will have affected off season short breaks

Western Dorset Growth Corridor Studies

In summer 2016, Weymouth and Portland Borough Council (and also West Dorset District Council) commissioned a number of studies for an area described as the Western Dorset Growth Corridor using funds from Dorset LEP. The geography was an area from Portland through Weymouth to Dorchester

[9] See https://www.visit-dorset.com/trade/research/industry

and their respective hinterlands, and the studies included Tourism, and Museums and Heritage. Other studies included events and transportation or were specific to the Weymouth and Portland Area.

<u>Tourism</u> – For Dorchester, Blue Sail were commissioned to:

- Assess where the Western Dorset Growth Corridor currently sits within the marketplace and the future potential change that will be required to access other growth and sustainable visitor markets, including conference markets suitable for current and proposed facilities
- Recommend what accommodation is required to deliver the needs of these markets.

Their findings and recommendations were:

- *Western Dorset is not a destination, but Weymouth and Dorchester are – and they are hubs for spend*
- *Weymouth and Dorchester are not large places - creating critical mass and competitive positioning is challenging*
- *Important to create additionality rather than displacement*
- *You cannot drift too far from the core of what a place is all about and its main markets*

They describe Dorchester as having "*a cultural offer, appealing to the highly sought after 'cultural tourist'. These cultural tourists are affluent couples, highly discerning, well-travelled in the UK and internationally, looking for high-quality, unique and meaningful experiences and not prepared to compromise on any aspect of their experience. The environment, food & drink and accommodation offer must all meet their expectation*"

Blue Sail define the priority market segment for the town as:

<table>
<tr><td colspan="4">DORCHESTER PRIORITY SEGMENT: CULTURAL EXPLORERS Aged 40+, socio-demographic AB; Living within 2 hours travel time north and east of Dorset; Relatively affluent, interested in culture, food, well-being and spending time together; Frequent holidays and breaks in UK and abroad; Travel in a couple or in groups of (women) friends and rarely in a family group.</td></tr>
<tr>
<td>Why:
Already a market for rural Dorset - opportunity to attract more day and staying visits – and spend - to Dorchester
Develop dedicated short breaks
Up- market, affluent segment
Come year round</td>
<td>Looking for:
Rounded experiences
Character, quality distinctive accommodation (hotels, guest houses, self-catering), independent restaurants and cafes serving high quality food, independent quirky shops
Historic environment with good public realm and public spaces
Distinctive cultural attractions, history, heritage, crafts, local festivals and events □ Relaxation and time together</td>
<td>Don’t want:
Touristy places
Package trips, ‘laid on’ activities
Lots of families
Over promise and under delivery</td>
<td>What’s stopping them: □
Lack of awareness
Lack of sufficient appropriate quality accommodation for overnight stays in Dorchester</td>
</tr>
</table>

And makes recommendations for the town to:

<table>
<tr><td colspan="2">Proposition - Make Dorchester a great cultural short break destination</td></tr>
<tr>
<td>Rationale:
Strong quality cultural offer with planned investment
More short breaks support existing shops and restaurants and grow per head spend</td>
<td>Target Market:
AB Cultural short break market</td>
</tr>
<tr><td colspan="2">What needs to Happen:
The development of additional serviced accommodation e.g. the proposed Dorchester Brewery Hotel, Travelodge, pub restaurant with lodge, more B&Bs
Strengthening profile of Thomas Hardy connections and experiences through marketing, potentially more events/festivals and visibility in town
Using new museum to help with market positioning on Jurassic Coast
Targeted marketing as a short break destination</td></tr>
</table>

<u>Museums and Heritage:</u> WPBC also commissioned independent consultants to:

- to assess the current heritage, offer and develop an action plan to improve the visitor experience, including marketing initiatives and joint promotion
- Recommend any diversification required of the current heritage offer to support the development of attracting new visitor markets and improving the quality of current provision
- Assess the heritage attractions current visitor profile and recommend ways in which visitor numbers can be increased Assess the current heritage offer (across the Western Dorset Growth Corridor)

Pertinent to this report, their recommendations concluded:

> …If the driver for local economic growth is tourism, then heritage must be integrated into the strategy for growth and not be treated as a sector in isolation.
>
> Developing the museums and heritage offer to help attract a higher spending visitor to the Western Dorset Growth Corridor cannot just be achieved through one off capital investments. Whilst there is an existing infrastructure and some strong heritage storylines to build upon, there needs to be a longer term vision and strategy for embedding heritage and culture as a theme that is carried through the different sectors that impact on a visitor's experience e.g. public places, built environment, events programming, marketing and promotion, transport and orientation, skills/workforce development.

Dorset Tourism Study 2019

Commissioned jointly by the Dorset Tourism Association, Dorset Council and BCP Council, the study[10] reviewed the current needs and challenges of tourism businesses and stakeholders in the Dorset visitor economy.

Through a survey completed by 208 businesses across Dorset, the report concludes that

- Tourism in Dorset is valued at £1.8bn and supports over 46,000 jobs
- Over 70% of tourism businesses in Dorset are looking to grow
- Addressing Seasonality or improving productivity is the key to achieving growth – the majority of the businesses wishing to grow see an increase in off-peak visitors as the way to grow
- Tourism in Dorset tourism needs to raise its profile within Dorset and nationally
- Boosting collaboration between …. tourism businesses could significantly improve Dorset's audience and reach

And notes that

- Tourism in Dorset is still heavily reliant on the peak summer season to generate the bulk of the income for the year

The businesses surveyed considered the most important interventions to support growth within their businesses were:

- Attracting more off-peak visitors 74.2%
- Increased coverage of Dorset in the media 63.2%
- Increased promotion to target new domestic markets 52.7%
- Increased promotion to target overseas markets 38.5%
- Increased number of events in the local area 32.4%

Dippy on Tour – Evaluation Report

For three months in early 2018, Dorset County Museum hosted Dippy, the Diplodocus from the Natural History Museum at the start of its UK tour. The impact of this project in the town was summed up in the report THE ECONOMIC & SOCIAL IMPACT OF DIPPY ON TOUR: A NATURAL HISTORY

[10] Not currently published, copy available with Project Officer or from DTA

ADVENTURE IN DORCHESTER[11]. Being the first venue of the tour, the event achieved national and regional prime time publicity on tv news and across the media and channels.

The businesses across the town fully engaged with the event, and the town was decorated by the BID and individual businesses for the duration of the visit.

Post code analysis (from on-line pre booked tickets) saw visitors come from PL Plymouth to BN Brighton and to BS Bristol and SN Swindon post code areas. Of these approximately 10% stayed one or more nights and more than a quarter of day visitors were from further away (i.e. not identified as local from post code analysis).

All the businesses in the report considered the town benefitted from Dippy on Tour, from additional town centre foot fall across the town, and a really positive atmosphere. All reported growth in business as a result, with several claiming double digit percentage growth.

Over 200 volunteers supported the event at the museum

Moonbury and Learn to be an Astronaut 2019 Evaluation

In July 2019, and to celebrate 50 years since the first moon landing, Dorchester Town Council organised Moonbury and Learn to be an Astronaut weekend.

This brought together academic institutions and industry to celebrate and explore the science behind space exploration and in particular the first moon landing.

The variety of events appealed to all ages and involved approx. 2000 locals and visitors to the area, supported by over 75 volunteers.

The report has recommendations for the running of future Family Science Days.

While this event is not strictly Heritage related, it demonstrates that well organised events can both attract significant institutions and business partners and be a draw for visitors and residents alike.

Thomas Hardy Victorian Fair and Open Dorchester 2019 Evaluation reports

2019 saw the town host the first Thomas Hardy Victorian Fair and later in the year the Open Dorchester 2019 event as part of Heritage Open Days. Both events were supported by Dorchester Town Council through the Joint Heritage Committee, and organised by a volunteer group.

Both events had similar aims:

- To raise the profile of Dorchester as a heritage tourism destination.
- To encourage Dorchester heritage providers and local businesses to work together.
- To offer a creative, fun and accessible cultural activity for the local community and visitors.
- To celebrate and maximise the unique assets of Dorchester.
- To contribute towards a cohesive identity for the town.
- To contribute to the economic and social wellbeing of Dorchester.

[11] https://dorsetcountymuseum.org/wp-content/uploads/2019/03/Economic-Social-Impact-of-Dippy-on-Tour-in-Dorchester-18.07.18.pdf

Each event saw High East Street and High West Street closed to traffic, and many businesses open who would not normally have traded on Sundays. The events consisted of a variety of activities or "events" with which the visitors could engage.

Each event attracted in excess of 4000 visitors, with the majority from the immediate local area and benefitted significantly from the large number of volunteers willing to be involved in all aspects of planning and delivering the events. The reports stress the importance of volunteers, in the planning, fundraising, promotion and delivery of the events.

Evaluation reports for both events had many recommendations concerning the event specifically, and more generally including:

- Business and community aspiration for road closures and more events in HE and HW streets
- Further themed heritage events should be piloted, e.g. Romans linked the redeveloped Roman Town House
- closer working with the town centre businesses to develop the economic benefit across the town
- development of skills and capacity of volunteers.

Social media and vox pops comments from the events noted,

- *"I love the fact that Dorchester loves its history"*
- *"The community are beginning to understand their uniqueness. Dorchester has 10,000 years of history, from the Wood Henge to today's Poundbury. It's not quaint history – it's living history. It's about the people choosing to live here for 10,000 years"*

Historic High Streets and Visitor Economy

Nationally and locally, Hight Streets are facing significant changes with a continuing series of national and local shop closures. Some of these are due to end of lease and opportunities taken to reposition property portfolios by larger chains, some are as a result of retirement of the business owner, some are due to extreme business pressure or failure of the business. High streets are seeing a higher proportion of vacant premises than previously.

Independent reports such as Grimsey 1 (2013)[12] and Grimsey Review 2 (2018)[13] note and make recommendations for change to sustain and restore vitality to high streets including such recommendations as:

> The curating of a place based on its distinct heritage is multi-dimensional and complex but should feature strongly when developing the "offer":
> Why would people want to live, work, play, visit and invest in the "place"?
> What does it stand for?

These recommendations and similar (town centres being a place of experience, changing uses of property in town centres, making town centres more social etc) have emerged in other reports and as

[12] http://www.vanishinghighstreet.com/wp-content/uploads/2016/03/GrimseyReview04.092.pdf
[13] http://www.vanishinghighstreet.com/wp-content/uploads/2018/07/GrimseyReview2_new1.pdf

recommendations form conferences such as those held by British BIDs and Association of Town and City Management.

The Dorchester Joint Heritage Committee received a report in March 2019[14] from its representative at the Historic Towns and Villages Forum meeting (January 2019) which focused on the role of the visitor economy in supporting Historic High Streets. The report notes several recommendations as a means to restoring and sustaining high street vitality including:

- The importance of experience led retail
- Getting the balance right between things that make money and things that cost money.
- Connectors – things that people can't get to elsewhere
- When considering how to brand a place, need to think about:
    - How or why did our place emerge?
    - What are its main sources of energy (people, resources etc.)?
    - What are our myths, legends or symbols?
    - What are the do's and don'ts of being here?
    - What does good service look like here?

Summary and Conclusions

While there is no data captured in Dorchester to enable a true picture of the volume, value and seasonality of tourism in the town, there are statistically robust analyses from national surveys that give an indication of the volume, value and seasonality of tourism in the town, and allow comparison with other destinations.

The sector locally follows the typical UK pattern, with peak occupancy close to capacity in the mid-summer months, and with year on year fluctuations resulting from many factors including political uncertainty, global unrest, recession and staycation, Brexit and the exceptional weather in recent years.

The weather plays an important part for indoor attractions and experiences, particularly given the recent exceptional summers.

Dorchester staying visitors are coming from a 2.5-3 hr. journey time predominantly from the Midlands, London and SE England. Foreign visitors are mostly from the Netherlands, Germany Belgium and France, and particularly during the Thomas Hardy Festival from Japan and USA.
Anecdotally, local businesses confirm the seasonality of tourism locally, and the home locations of staying visitors.

Most attractions visitors are either resident or staying visitors from across the county, but visitors will travel much further for a "unique" experience or event. This presents a real opportunity to promote the Dorchester offer across Dorset and particularly to staying visitors in the BH postcodes.
Dorchester has much to offer the Heritage visitor, but the offer is not well defined or well known amongst its target market and target geography. There is an opportunity to build on the visitor experiences throughout the town for the wider benefit of the town centre.

The town has the opportunity to grow its short break visitor appeal, using its cultural and heritage offer as an attractor.

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[14] https://www.dorchester-tc.gov.uk/docs/downloads/190325-Agenda.pdf

Opportunities exist to increase the value of tourism locally by:

- Defining what the Dorchester offer is, and establishing an aspirational vision for the town that is relevant to the attractions, accommodation providers and town centre businesses
- Creating a brand and some USPs, subsequently used to raise the awareness of the Dorchester offer generally
- Promoting and developing the offer, particularly short breaks to ABC[1] groups
- Growth of existing and new events,
- Increasing visitor numbers for both staying and day visitors away from the peak season and maximising the existing asset utilisation.