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Visit Dorset Consumer survey

Report prepared by national coastal tourism academy

Key findings

This consumer survey was conducted between March and April 2023 to measure satisfaction from visits and to gauge travel habits in Dorset.

74% SAID THEY WOULD DEFINITELY RETURN TO THE SAME LOCATION IN DORSET

WHY VISIT DORSET?
THE MAIN MOTIVATION FOR A VISIT WAS RELAXATION, QUALITY TIME WITH FRIENDS OR FAMILY, AND TO SIGHTSEE OR EXPLORE.

43% WOULD LOOK FOR SPECIAL OFFERS AND DISCOUNTS TO COMBAT THE COST OF LIVING

90% *thought their holiday was either excellent or good value for money*

67% ARE BEING CAUTIOUS DUE TO THE COST OF LIVING CRISIS

78% CLAIMED THAT REDUCING THEIR CARBON FOOTPRINT OR MAKING MORE SUSTAINABLE CHOICES ON HOLIDAY WAS IMPORTANT

97% *OF RESPONDENTS WERE SATISFIED WITH THEIR BREAK IN DORSET*

LOOKING FORWARD
PRICE IS THE TOP FACTOR INFLUENCING CONSUMER BOOKINGS IN 2023 CLOSELY FOLLOWED BY SCENERY AND LANDSCAPE

59% WOULD LIKE MORE LOCALLY SOURCED FOOD AND DRINK ON THEIR HOLIDAY IN DORSET

About our visitors

and the survey methodology

Methodology:

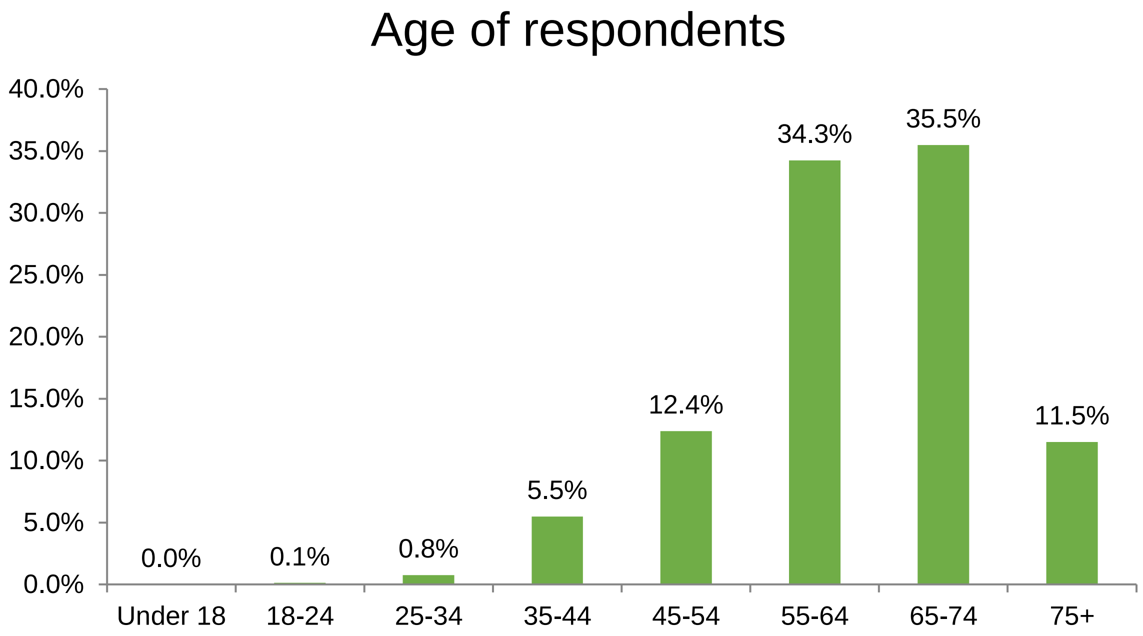
The survey responses comprise 2,359 Visit Dorset followers, website users and newsletter subscribers

The satisfaction, value for money and performance results in this summary represent only those who have visited Dorset since January 2021.

The online survey was undertaken between 14th March and 16th April 2023

Respondents represented a slightly older mix of age groups (see chart)

Please note: Questions 6, 7, 8, 12, 13, 18, 20, 21, 23, 25, 26 allowed for respondents to select more than one response and therefore the responses will add up to more than 100%



About our visitors

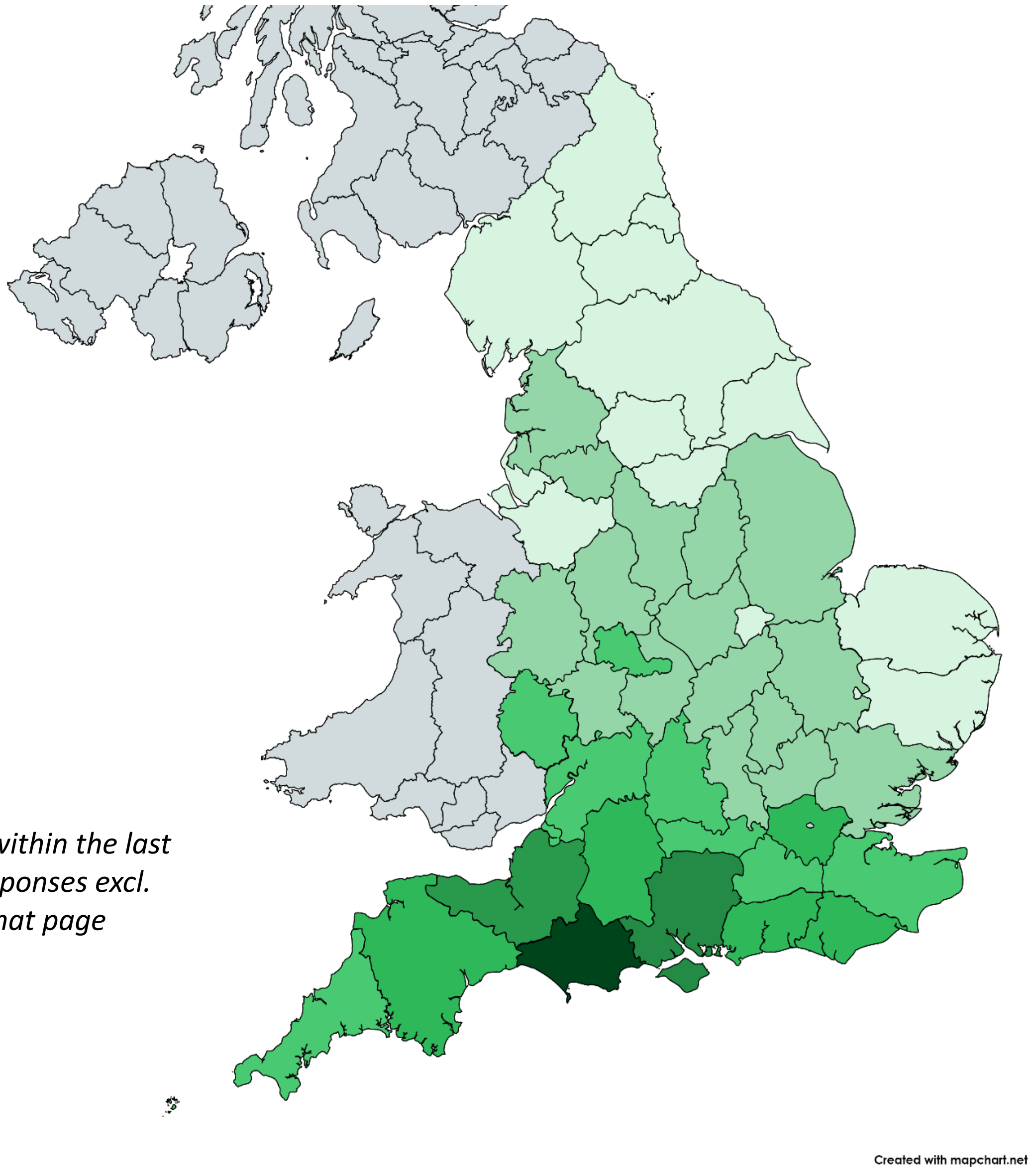
Normal place of residence

Respondents represented every county of England, with 28% from Dorset*, 10% from Hampshire and Isle of Wight, 6.3% Somerset, 5.5% Devon, 4.9% Wiltshire, 3.5% Sussex (East and West)

2% were from Wales

1% from Scotland

As well as a handful of responses from Germany, Australia, Finland and Canada



** Dorset respondents are residents of which 86% have taken an overnight break in another part of Dorset within the last 3 years. Each question has been analysed for a) all responses, b) Dorset based responses only and c) all responses excl. Dorset residents. Where significant variations in responses were identified they have been highlighted on that page*

About our visitors

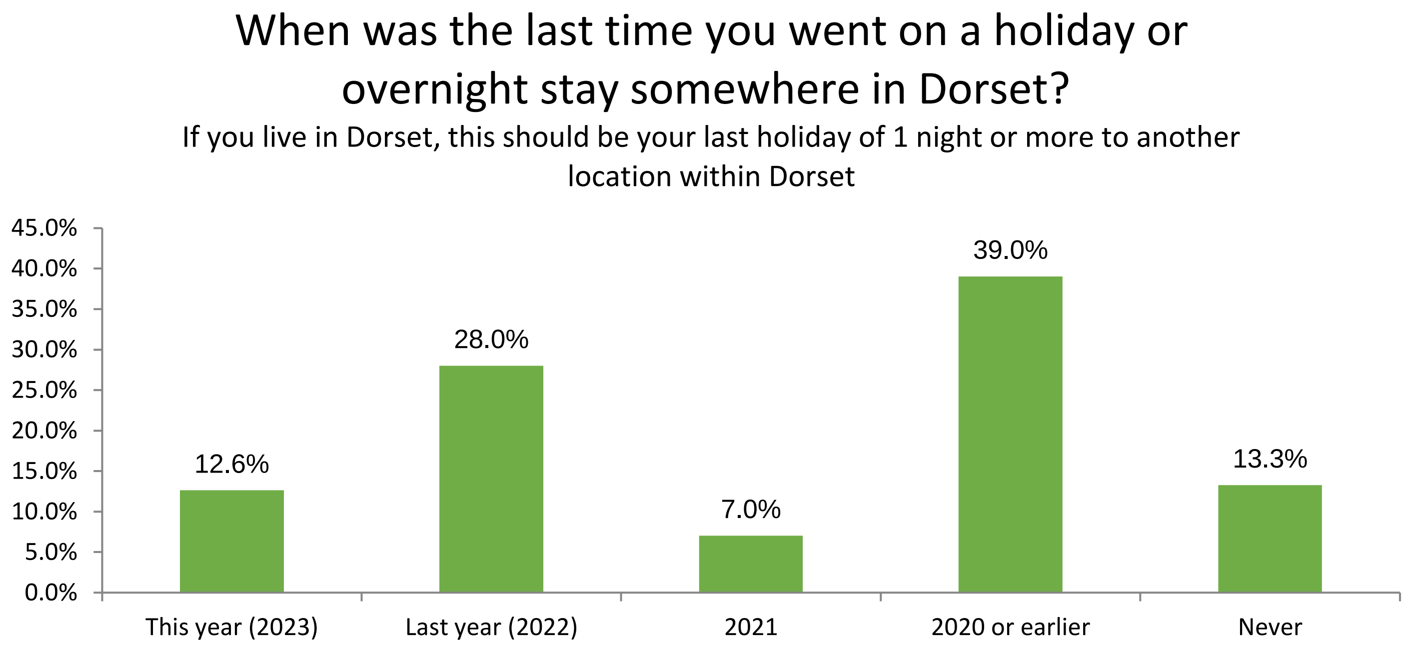
When and where they visited

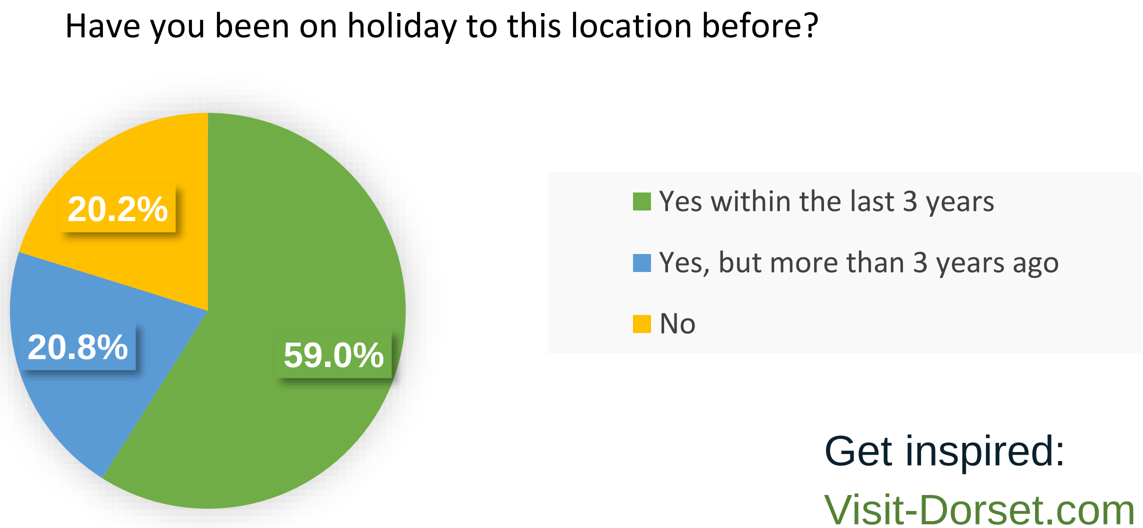
47.7% had visited Dorset since the start of 2021

39% had not been for a few years

13.3% had never visited Dorset before

Of those that have visited Dorset recently, the vast majority had visited that location within Dorset on a previous occasion – 59% within the last 3 years and 21% more than 3 years ago. Only 20% were on their first visit.





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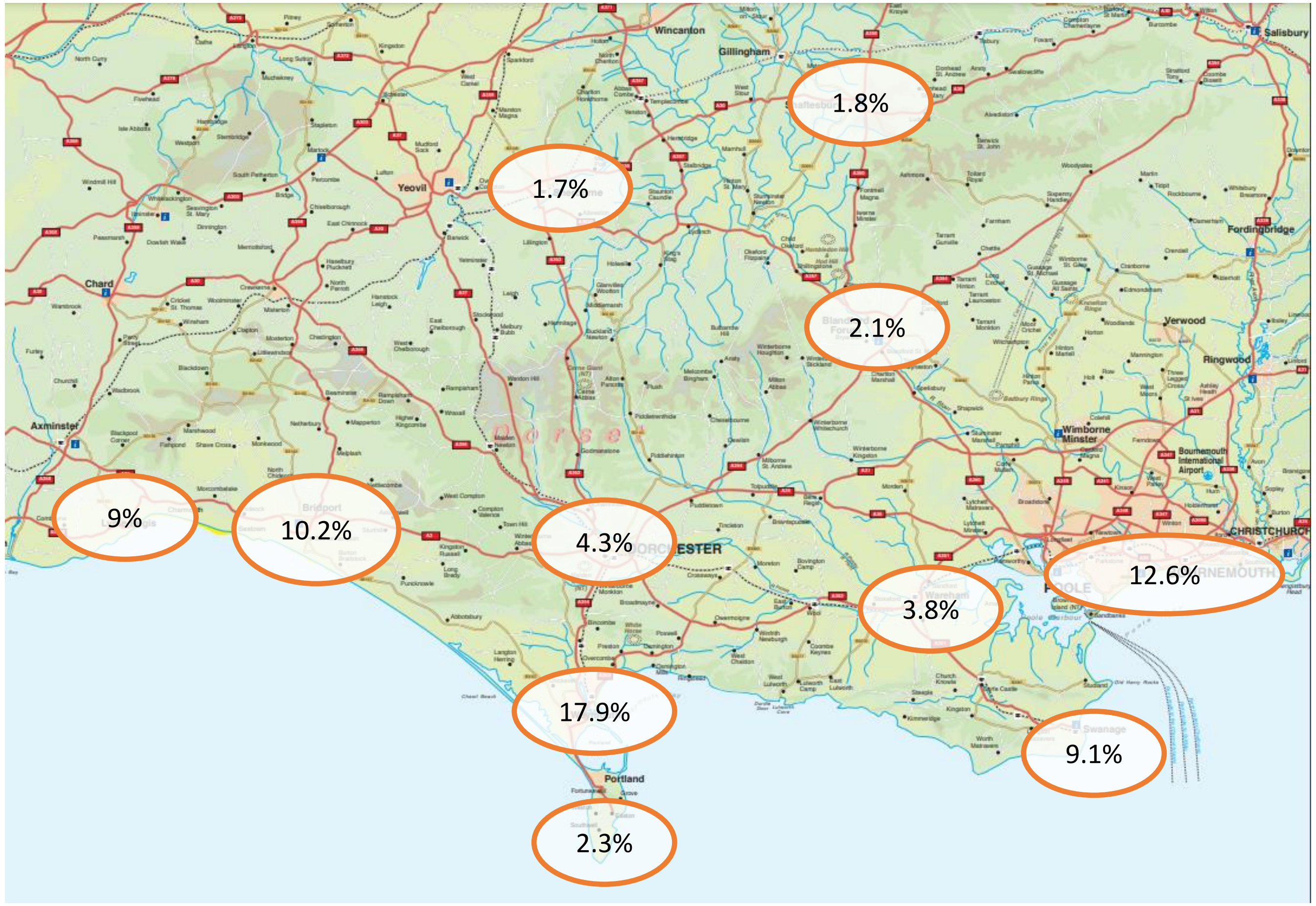
About our visitors

When and where they visited

The majority of visitors stayed in well-known locations across Dorset

Where in Dorset did you visit?

If more than one place, choose the location where the majority of your time was spent			
Abbotsbury	1.0%	Portland	2.3%
Beaminster	0.8%	Shaftesbury or Gillingham	1.8%
Blandford Forum	2.1%	Sherborne	1.7%
Bournemouth or Poole	12.6%	Sturminster Newton	0.3%
Bridport or West Bay	10.2%	Swanage	9.1%
Christchurch or Highcliffe	4.0%	Verwood	0.5%
Corfe Castle	3.5%	Wareham	3.8%
Dorchester	4.3%	Weymouth	17.9%
Lulworth	1.9%	Wimborne Minster	1.7%
Lyme Regis	9.0%	Other	11.6%



Source: Q2: 926 responses

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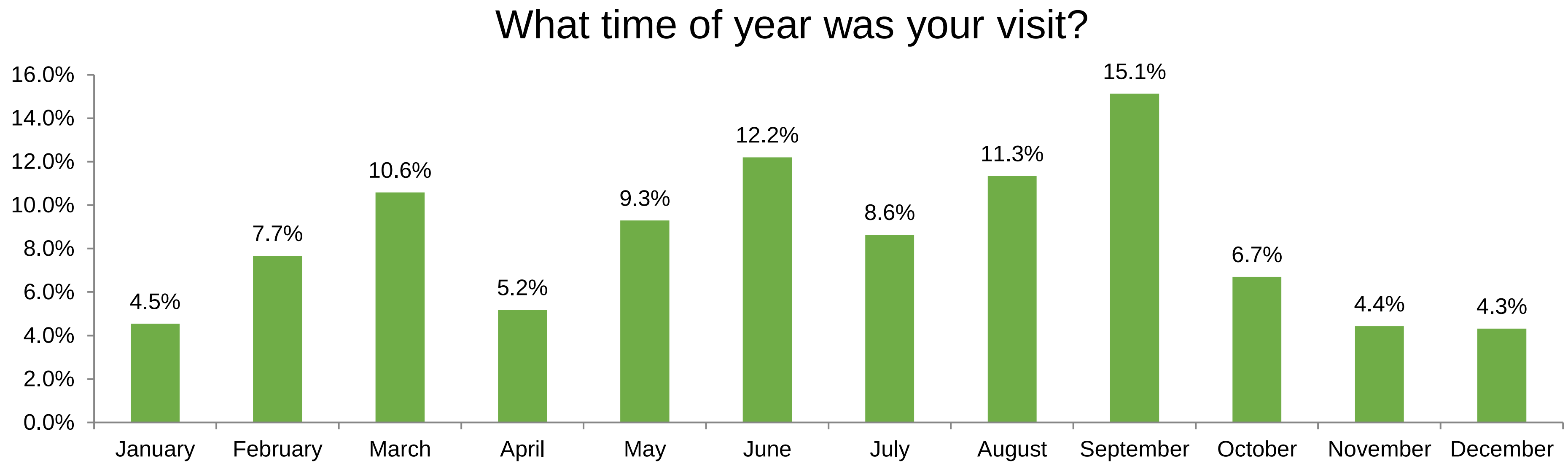
About our visitors

When and where they visited

The seasonality of responses showed the most popular month was September – although please note that 77% of respondents for this question were visitors over the age of 55 which will have skewed the results. 20% of visits by respondents took place in July and August and 31% of visits took place between November and March showing a strong year-round market amongst these respondents



Source: Q4: 926 responses

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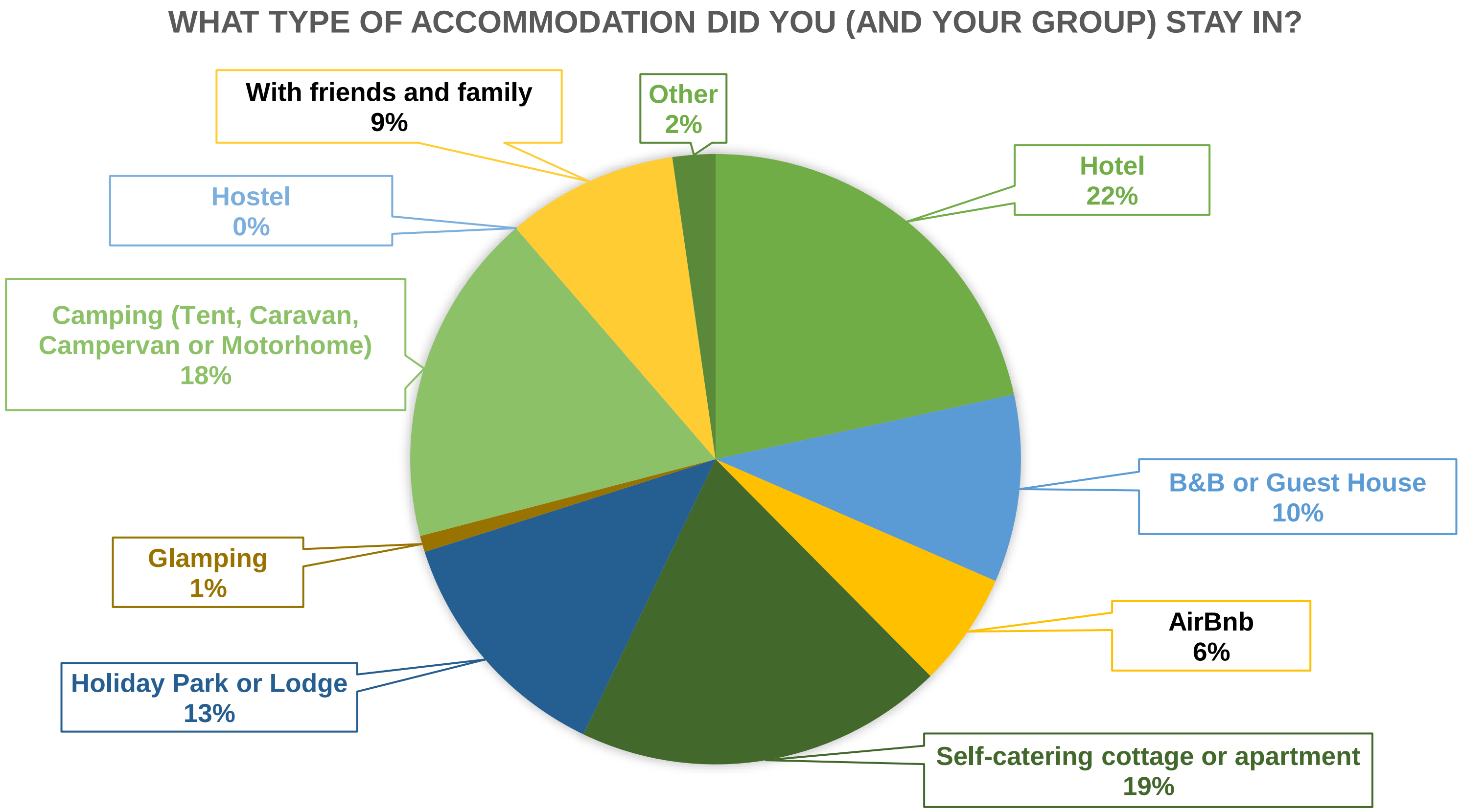
About our visitors

Where they stayed



32% stayed in a form of serviced accommodation (Hotel, B&B or Guest House)

25% stayed in non-serviced accommodation (apartment, cottage)

32% stayed in a holiday park or camp site

9% stayed with friends and family

NB: Dorset residents are less likely to be using hotels (20%) and self-catering cottages (14%) and more likely to be camping that all other respondents with 24.5% choosing to camp

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Source: Q5: 926 responses

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About their visit

Who they travelled with and motivations

<u>Who were you with on this holiday?</u>
72% of visits were undertaken with a partner/spouse
15% with Children (under age of 18) & 13% with Children (18+)
14% with friends
5% with parents or grandparents
6% not travelling with anyone else

12% of travellers had dogs with them on their visit

The main motivation for visits were:
1) Relaxation 53%
2) Quality time with friends or family 48%
3) To sightsee or explore 33%*

Of note, 15% just booked a break and didn't mind which location they visited and a number of responses within "other" were for a special occasion

* *Dorset respondents were less likely to say their motivation was sightseeing*

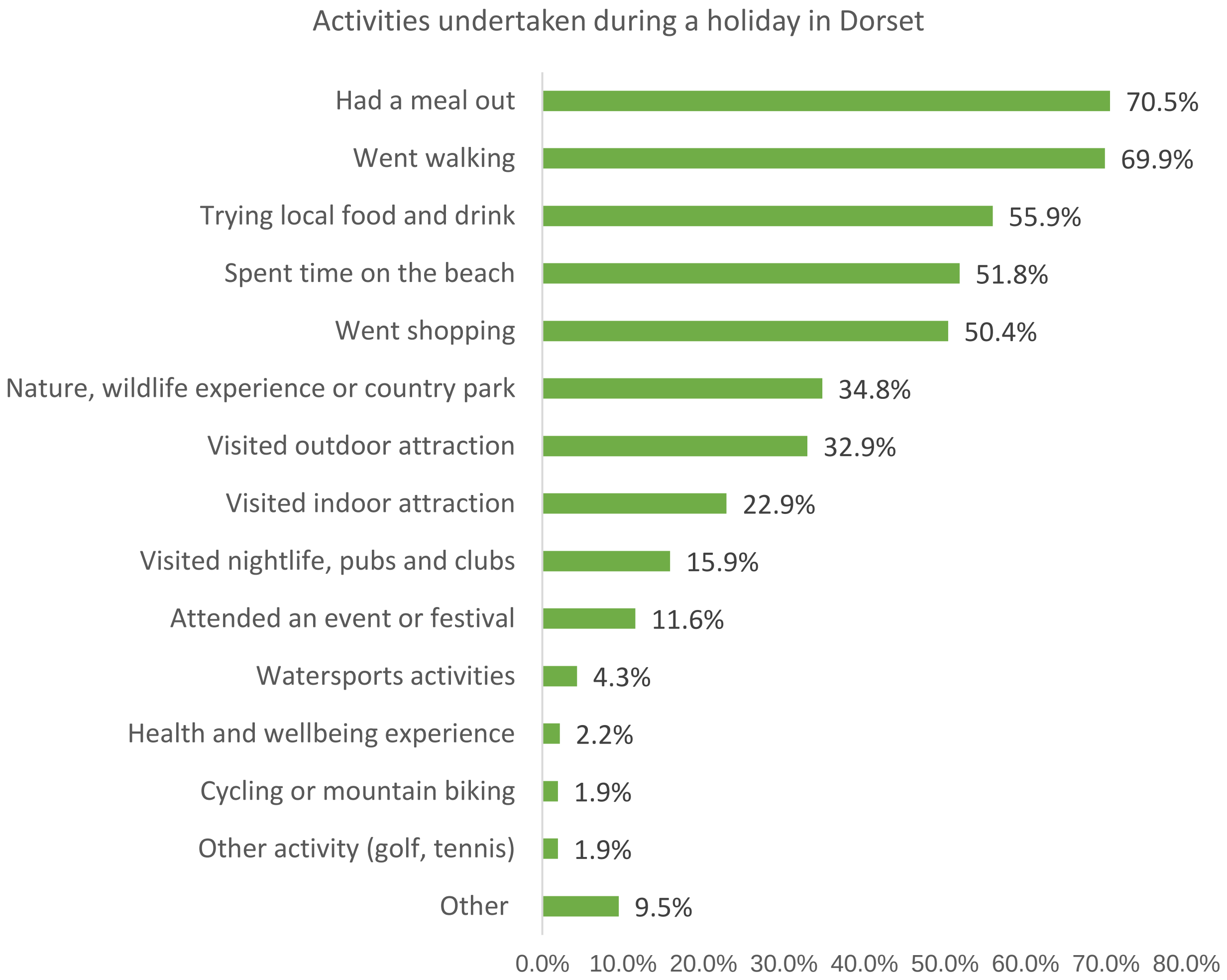
Activities undertaken

About their visit

Popular activities undertaken during the holiday included having a meal out, going for a walk, trying local food and drink and spending time at the beach.

Outdoor attractions were more popular than indoor attractions post Covid-19 lockdowns.

Engagement in watersports, cycling and other outdoor sports is lower than national studies, perhaps reflecting the older profile of respondents to this survey and may not accurately reflect overall participation levels in these activities across Dorset.



Source: Q6: 926 responses

Satisfaction

About their visit

Overall satisfaction	
Very satisfied	81%
Satisfied	17%
Neither satisfied nor dissatisfied	1.5%
Dissatisfied	0.5%
Very dissatisfied	0.2%

Value for money	
Excellent	46%
Good	44%
OK	9.1%
Poor	1.2%
Very poor	0.0%

How did your experience compare to expectation	
Much better	25%
Better	31%
About the same	41%
Worse	1.6%
Much worse	0.1%
Other (please specify)	1.6%

97.7% were satisfied with their visit

90% thought it was good or excellent value for money

56% said it was better than their expectation

only 1.7% said it was worse than their expectations

Source: Qs 9-11: 926 responses
Dorset respondents scored 97.4% satisfied, 87% good or excellent value for money and 53% exceeded expectations

Future intentions

for any Dorset visit or to the same location

Positive associations with Dorset reflect the quality of the natural environment (49%), the quality of accommodation (49%) and the quality of the destination (47%) – service at places to eat (46%) and choice of things to do (47%) were also important

Thinking specifically about their recent experience and whether they would return:

Would definitely return to same location in Dorset	74%
Would definitely consider other Dorset locations	64%
Would definitely consider other UK (non-Dorset) locations	29%
Would not return to the same location	1.0%
Would not consider other UK locations	0.5%

78%

Net Promoter Score

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Source: Qs 12-14: 926 responses
Net promoter score was 79% for Dorset respondents

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Future intentions

for any Dorset visit


Credit: VisitBritain

When asked about their future intentions for a visit to Dorset:

46% "I'm keen to visit Dorset within the next year"

27% "I would like to visit Dorset but not sure when"

7% "I am only considering a day trip to Dorset next year"

4% "I'm not sure" and 14% "other" were predominantly local residents

How often do you tend to visit Dorset for a holiday?

19% said they visit Dorset several times a year

23% said they typically visit Dorset at least once a year

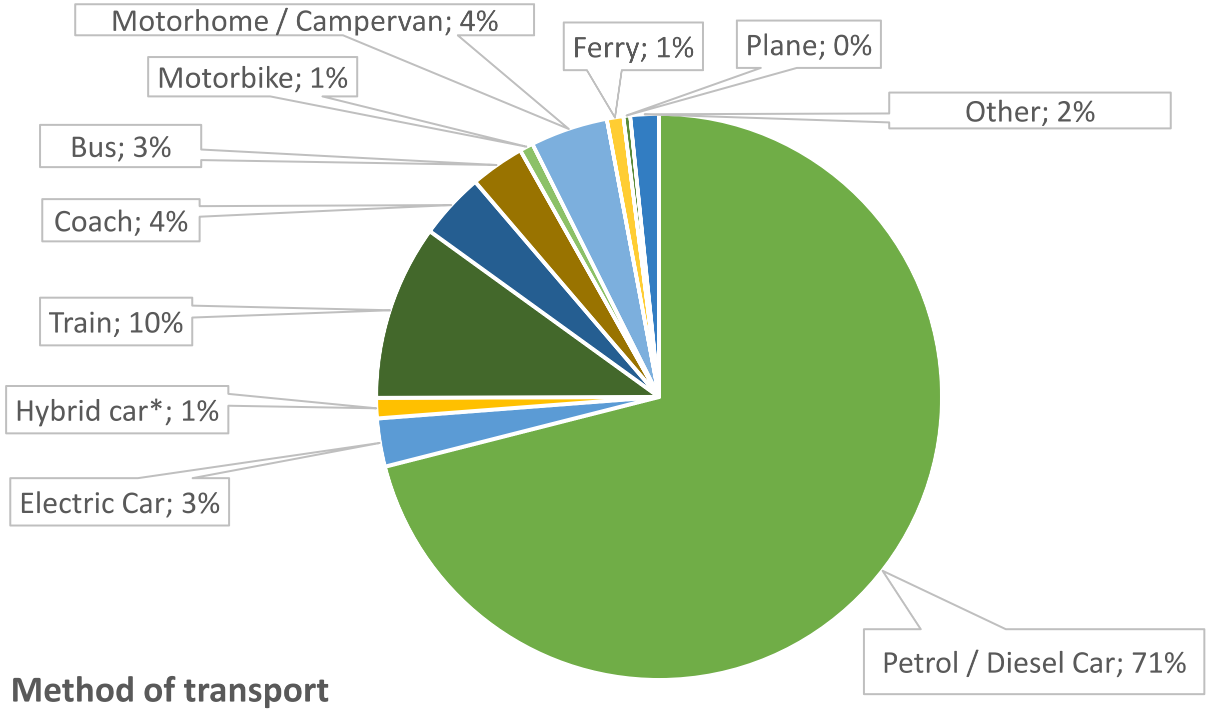
34% said they visit Dorset every few years

Just 7% had never been to Dorset before this visit and 17% said "other" and tended to be residents or prefer day trips

Source: Q 15 & 16: 1,928 responses
Dorset respondents 40.5% keen to visit overnight in next year, 25% take an overnight break in the county several times a year, 20% once a year

Travel behaviour

for a visit to Dorset



Method of transport

The majority of respondents travelled to the county or would travel by car.

Responses in the "other" category were predominantly from those that live in Dorset.

** Please note that Hybrid car was not an option but mentioned in the other comments by 27 respondents so added into the data, it may not represent all hybrid users.*

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Source: Q 17: 2,327 responses
Dorset respondents less likely to travel by car 68% and more likely to travel by bus 6% and motorhome 6%

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Future considerations

Product development ideas

Almost 60% of visitors would like to see more locally sourced food and drink available, and nearly 50% would like more places open in the winter months. More free activities, arts and cultural experiences and outdoor experiences were also popular with a third of respondents.

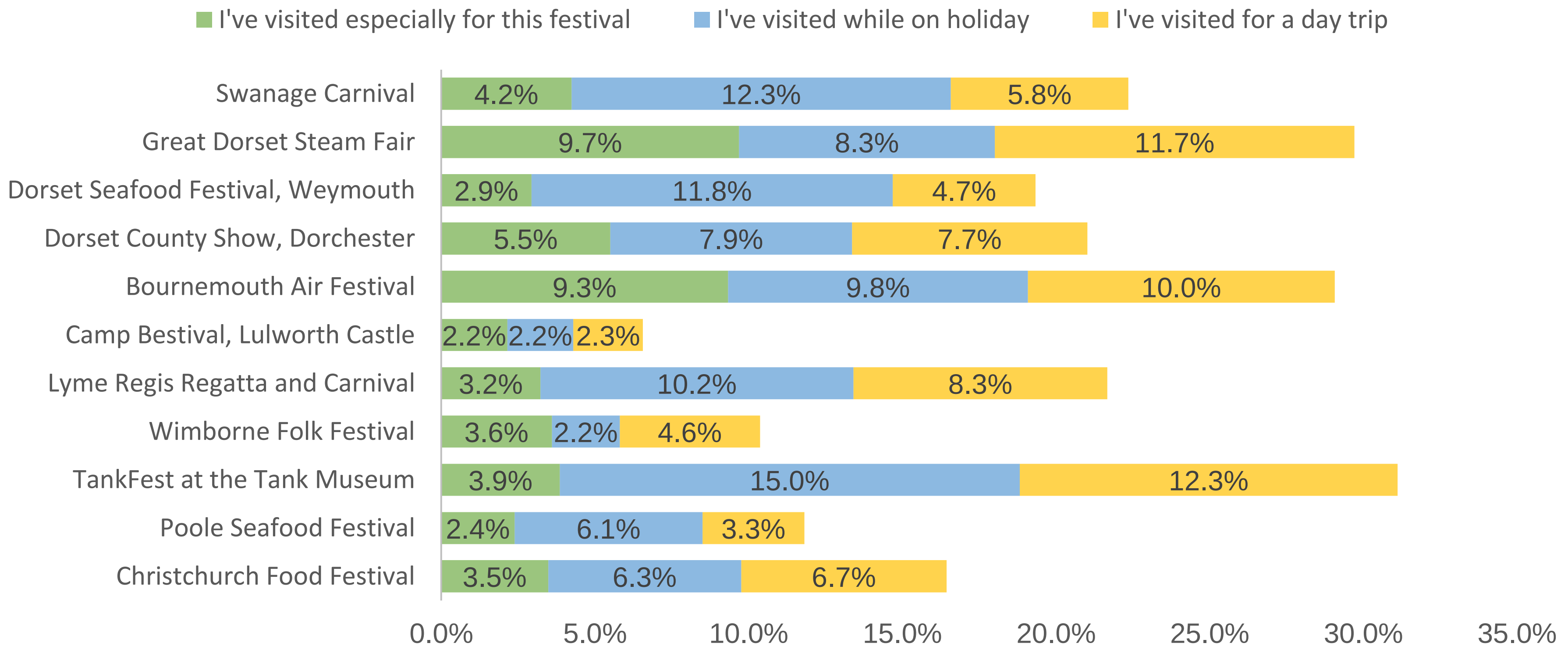
A quarter of respondents would like more dog-friendly places although there were a number of comments in the "other" field from respondents looking for dog-free places.

The availability of facilities for electric vehicle charging and information for motorhome users (parking, safe road access information) were also included in the other field, along with parking charges and the condition of the roads.

Source: Q 18: 1,793 responses
Dorset respondents more likely to want places open in the winter (56%), free activities (48%) and more events (18%)

Events and Festivals

Visit behaviour (excl. Dorset respondents)



TankFest, the Bournemouth Air Festival, and the Great Dorset Steam Fair were the most popular events with respondents, although all events had driven bookings to Dorset.

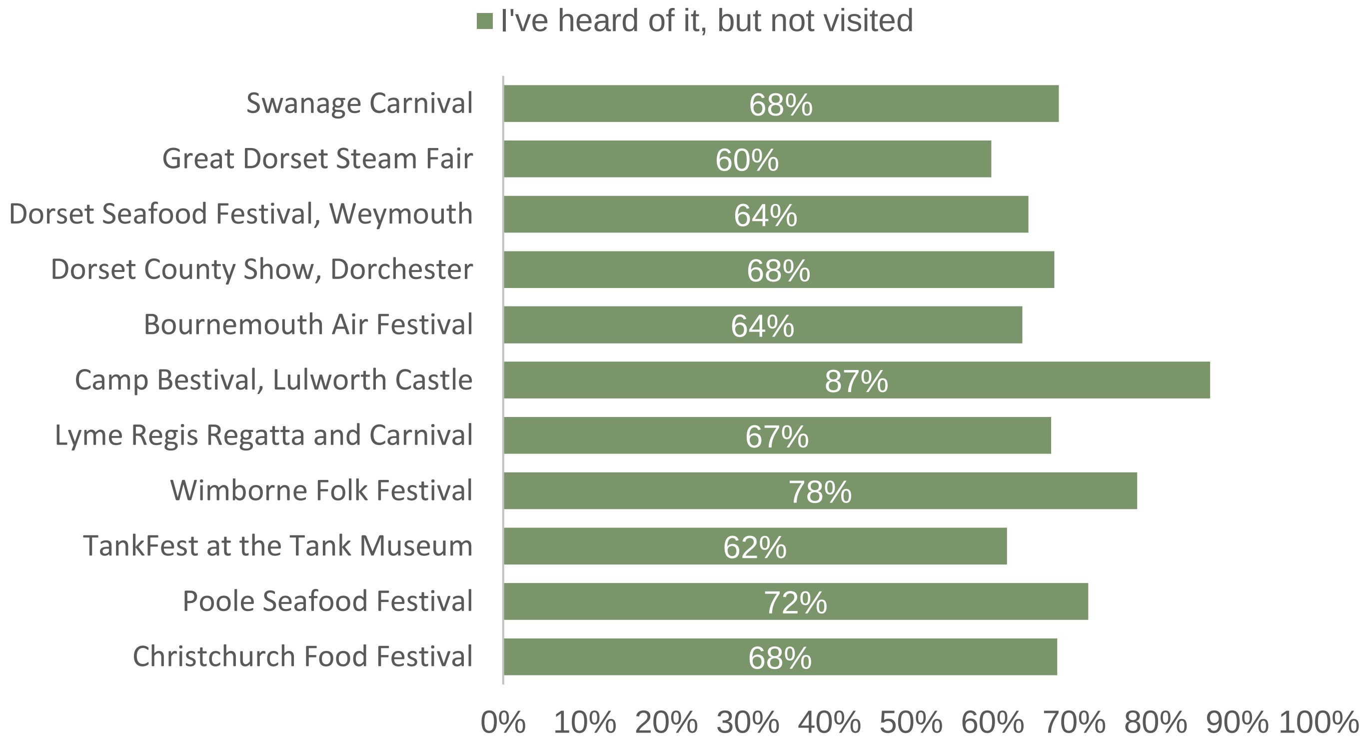
NB: the results of this question exclude Dorset based respondents

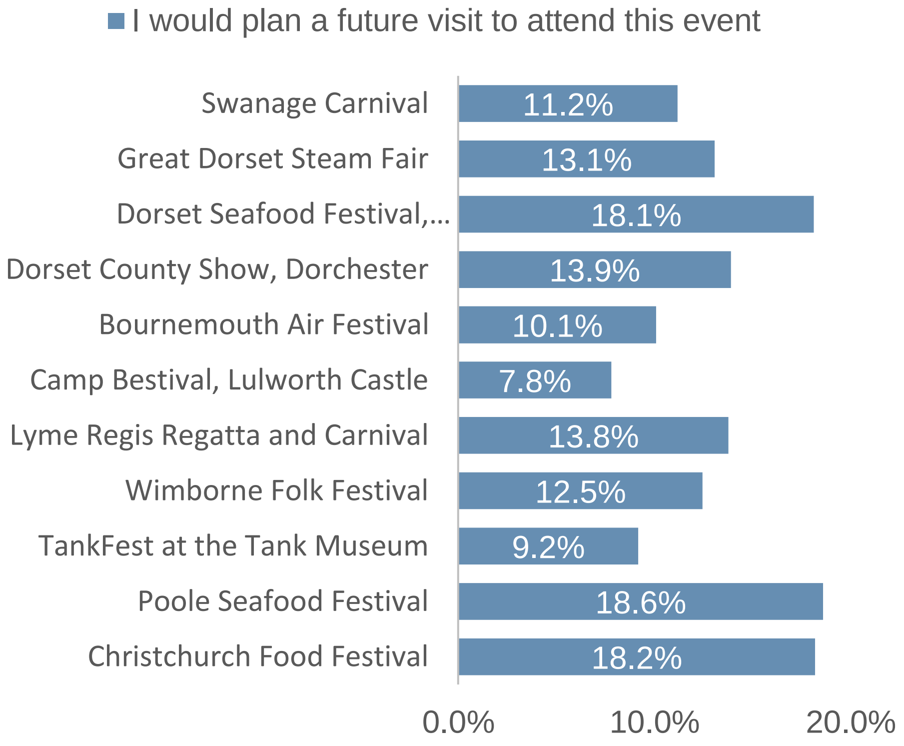
Source: Q 19: 1,179 responses excl. Dorset respondents

Events and Festivals

Awareness and potential visits (excl. Dorset respondents)

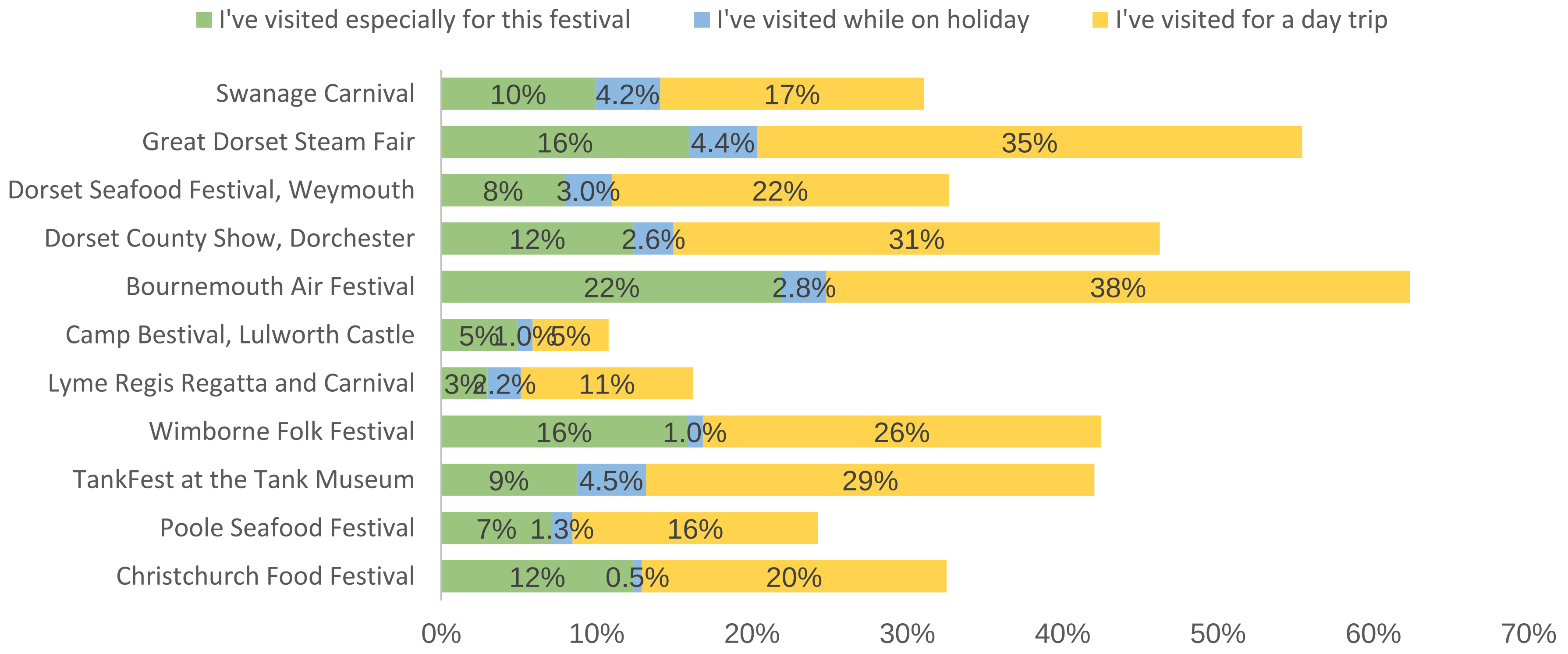
Camp Bestival was the most well known event, although all events and festivals showed a good level of awareness amongst respondents who had not previously visited that event. Whilst all events show they have potential to increase visits to Dorset, those showing the most potential among respondents were food and drink festivals followed by the County Show and Lyme Regis Regatta.





Events and Festivals

Visit behaviour (Dorset respondents only)



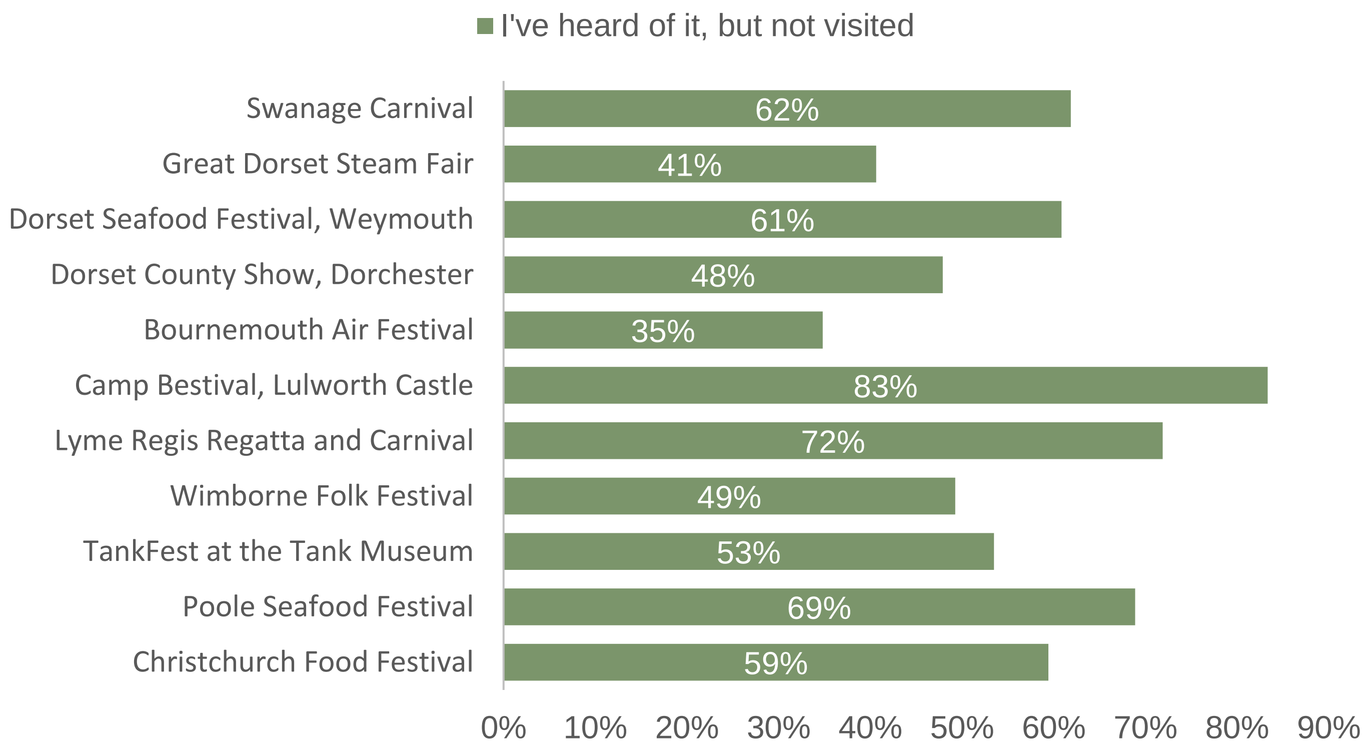
Dorset respondents were more likely to have been day visitors to events across the county although the events are still driving some overnight stays by Dorset respondents visiting a different part of the county

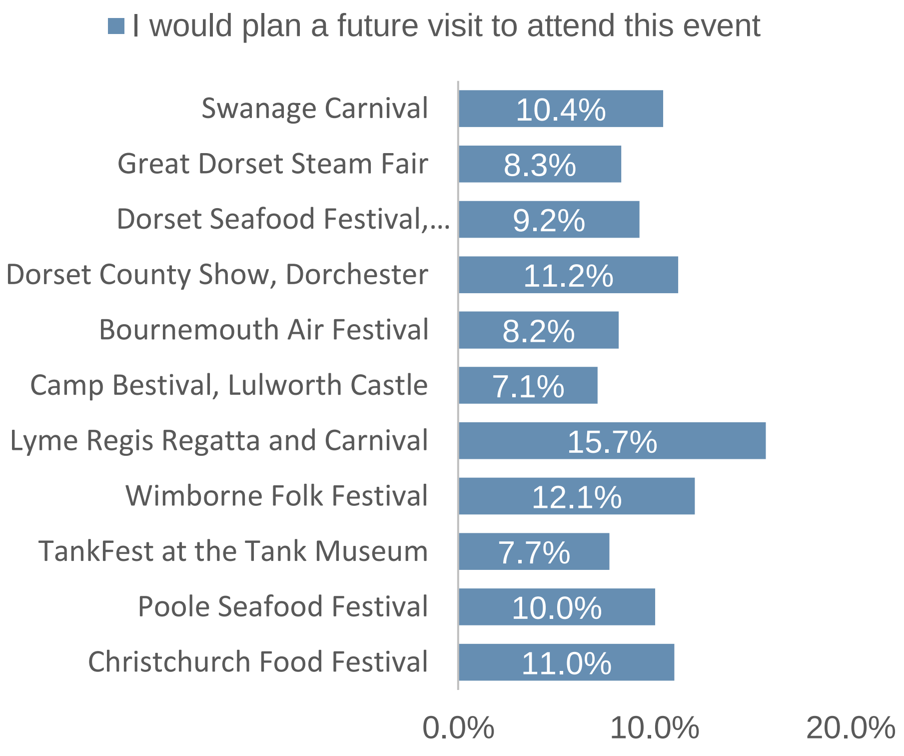
Source: Q 19: 453 Dorset based responses

Events and Festivals

Awareness and potential visits (Dorset respondents only)

Camp Bestival was the most well known event for Dorset respondents. All events still show potential to drive additional visits with the Lyme Regis Regatta the most popular among Dorset respondents





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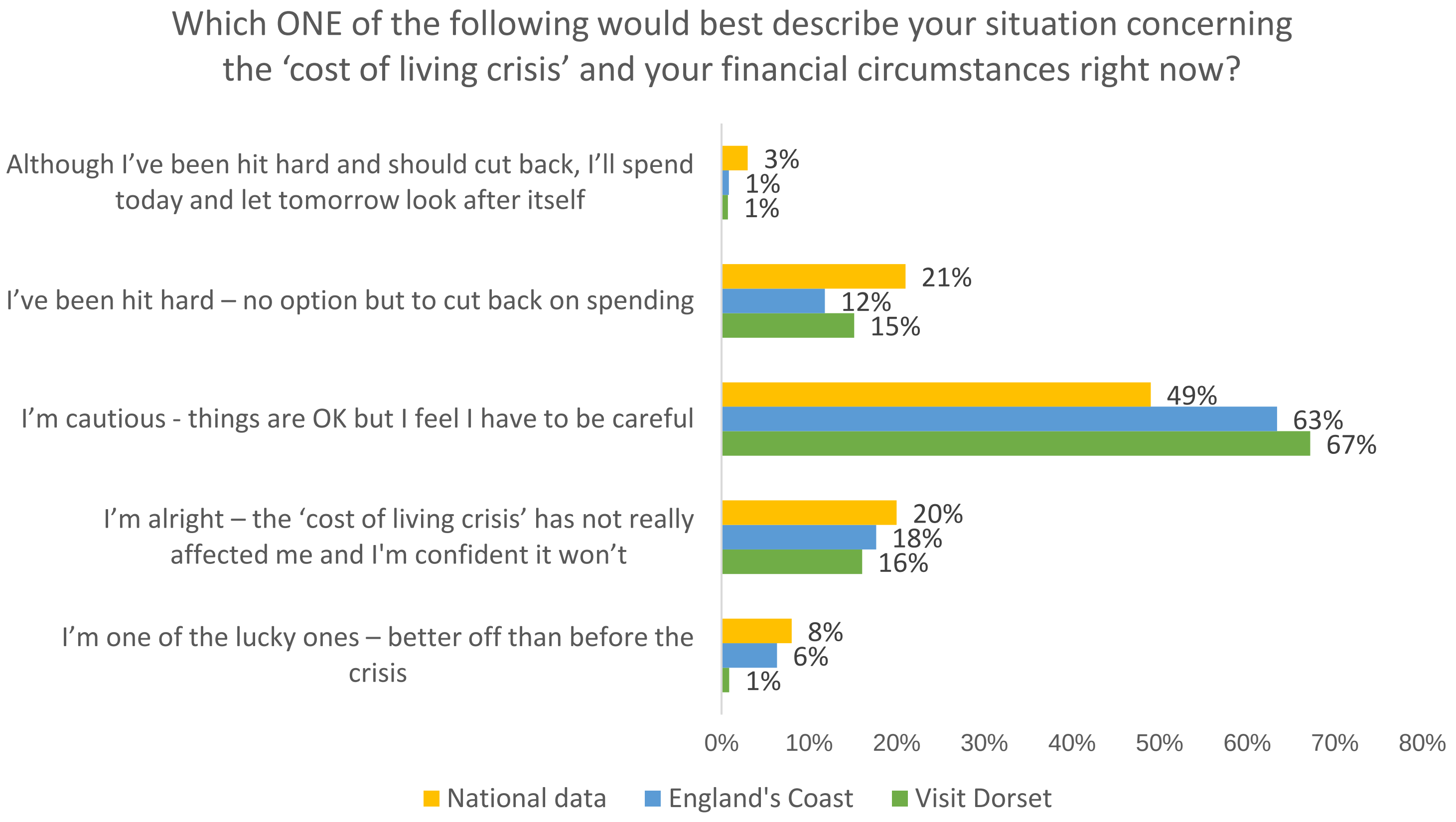
Source: Q 19: 453 Dorset based responses

Cost of living situation

Impact



The majority of respondents (67%) said that they are being cautious "things are OK but I feel I have to be careful"

17% say they are not affected or better off as a result of the current economic climate

The Visit Dorset respondents that have been hard hit by the economic situation is lower than the national sample*.

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*National data taken from VisitEngland Domestic Sentiment Tracker – November 2022 wave.
England's Coast data taken from Consumer survey undertaken in October & November 2022.
Visit Dorset source Q:20 1,796 responses

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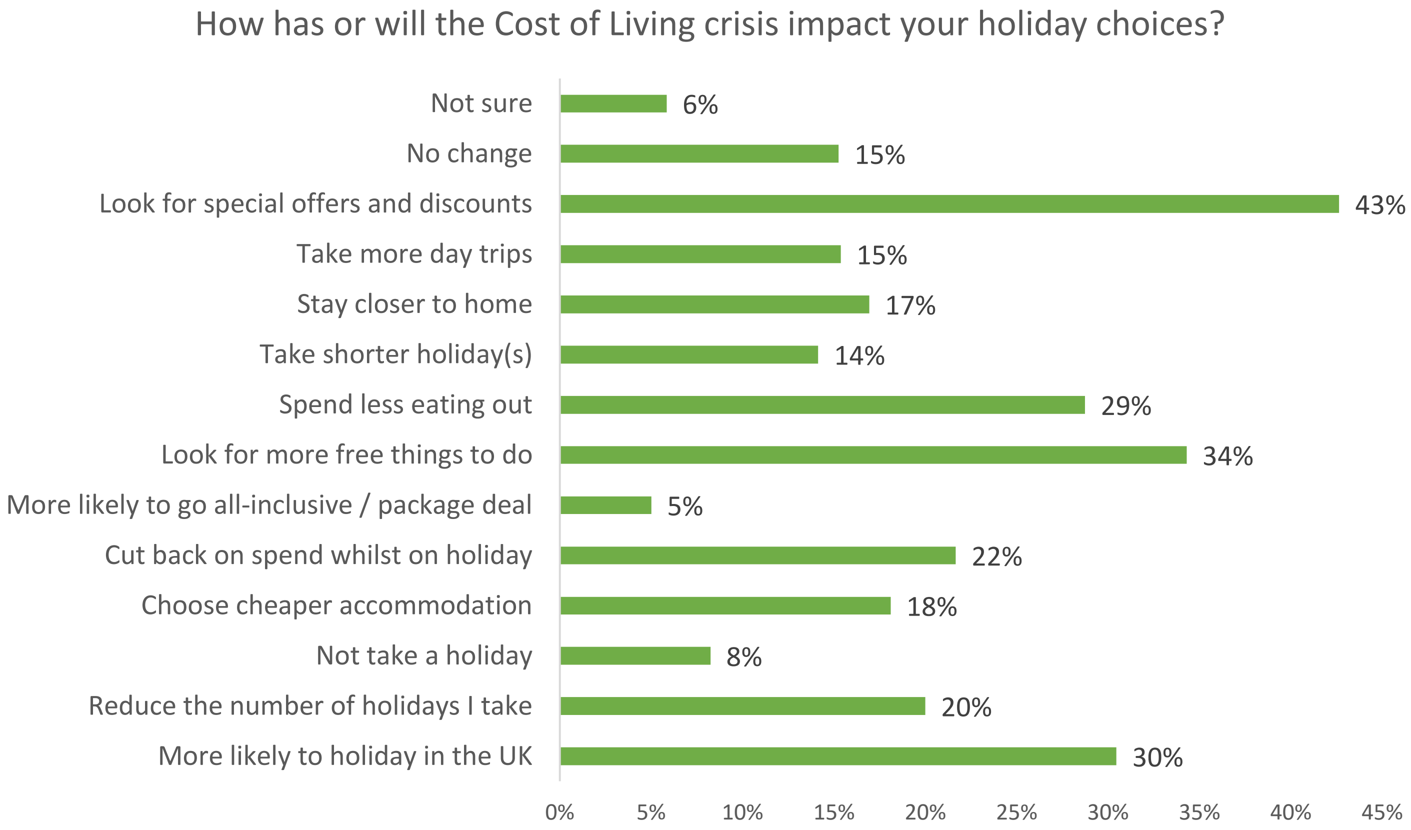
Cost of living situation

Considerations



When considering how respondents might change their holiday choices as a result of the cost of living situation, the top answers were **"Look for special offers and discounts"** (43%), **"Look for more free things to do"** (34%) and **"Spend less eating out"** (29%) – the latter two both also feature in the top responses on the VisitEngland survey.

15% will not change their holiday choices

30% are more likely to holiday in the UK

Only 8% say they won't take a holiday, although 20% say they will reduce the number of holidays they will take and 15% will take more day trips.

National comparison taken from VisitEngland Domestic Sentiment Tracker – November 2022 wave.
Visit Dorset source Q:21 1,796 responses
Dorset repondents were more likely to take more day trips (23%), stay closer to home (24%) and not take a holiday (11%)

Sustainability

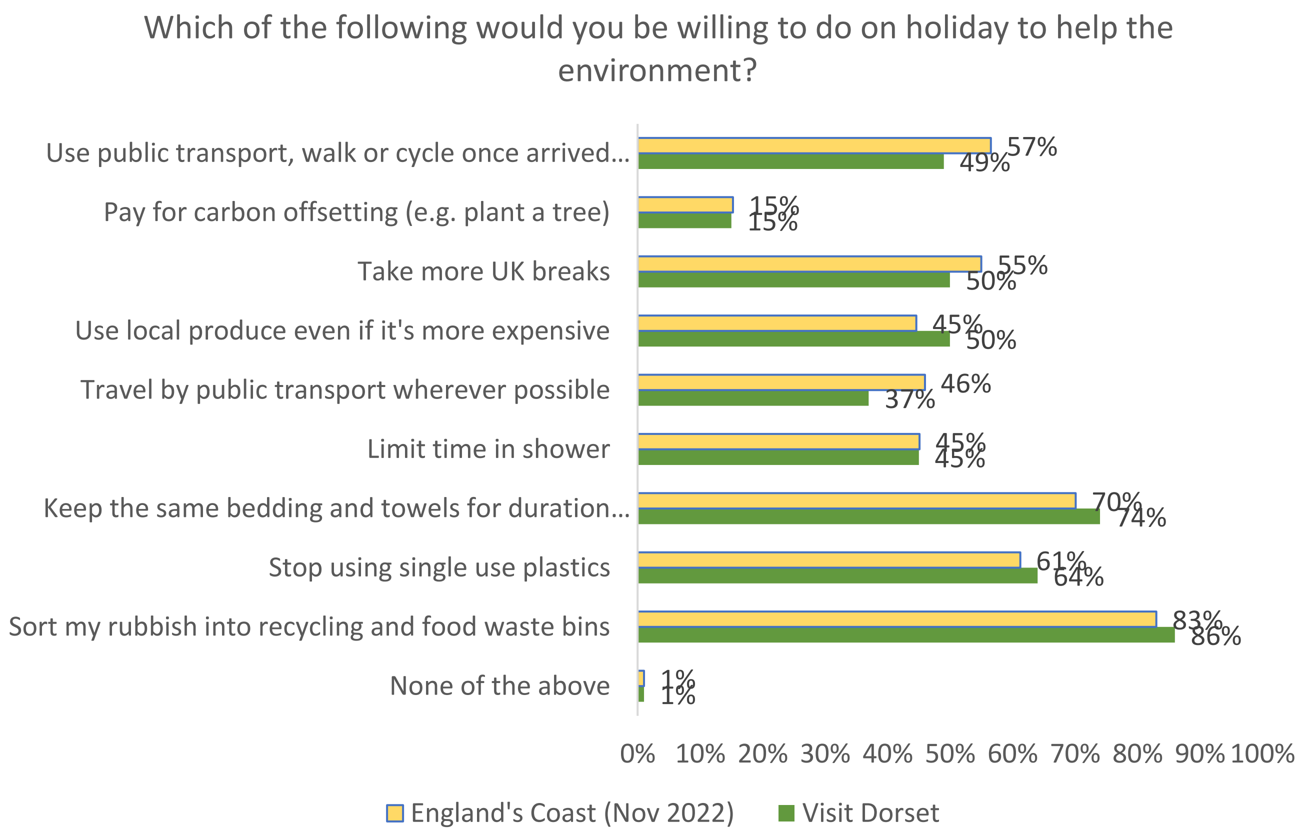
Importance and considerations for future visits

78% say reducing their carbon footprint or making more sustainable choices on holiday was very (25%) or somewhat (53%) important – this is inline with the national sentiment from the England's Coast survey.

The vast majority were willing to sort their rubbish, keep the same bedding and stop the use of single use plastics on holiday.

55% were willing to take more UK breaks

Half of survey respondents (49%) were willing to use public transport, walk or cycle once they've arrived in the destination, therefore making that as easy and straightforward as possible for visitors could help convert these visitors to public transport

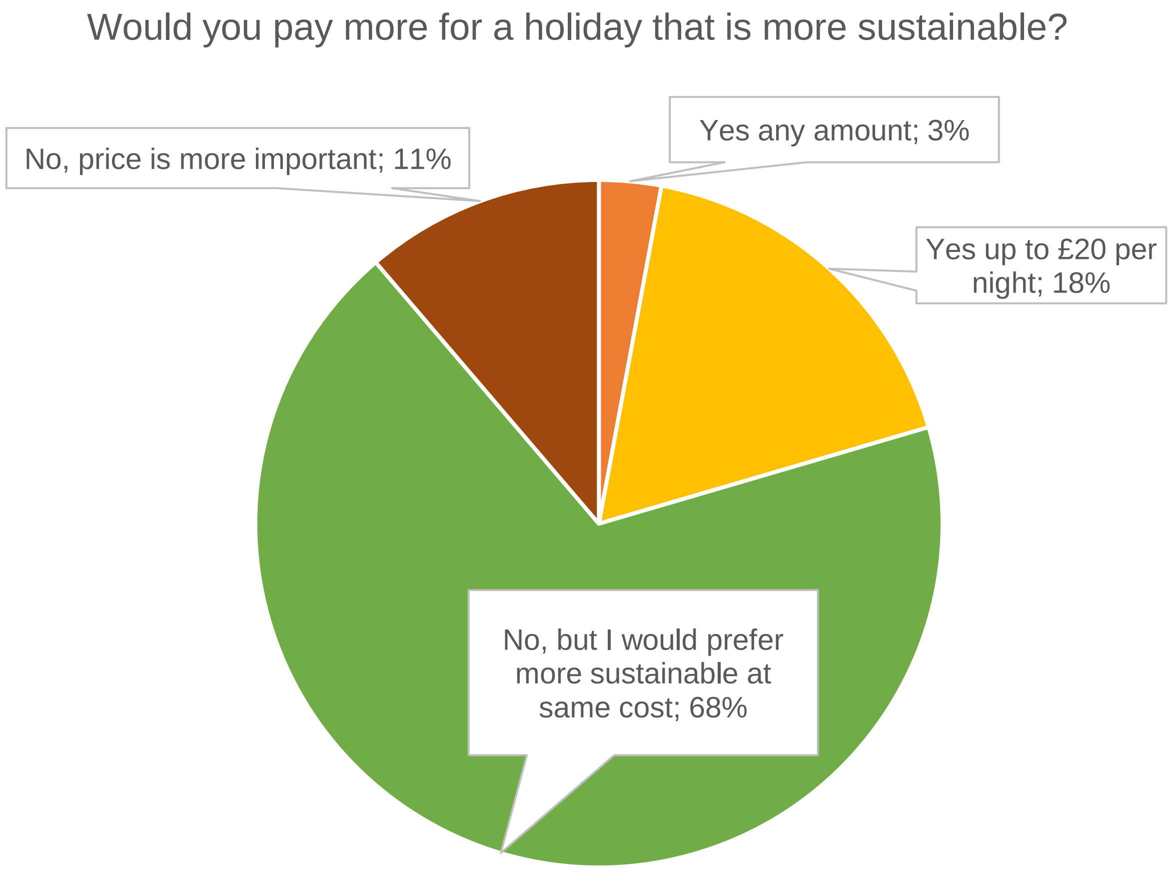


Sustainability

Price considerations

Two-thirds (68%) of respondents say they would not pay more for a holiday that is more sustainable but would prefer a more sustainable holiday at the same cost

21% are prepared to pay more for a more sustainable holiday



Source: Q 24: 1,778 responses

Bookings and plans for 2023

Current plans and key factors influencing choice

What are your current plans or preferences for holidays in 2023?

Results for respondents not from Dorset:

- 30% want to take a holiday abroad in 2023
- 54% want to visit a UK location (excluding Dorset)
- **51% will consider a Dorset holiday in 2023**
- 25% are considering a day trip to Dorset

35% of Dorset respondents will consider a Dorset holiday and 40% considering Dorset day trips in 2023

Price is the top factor influencing consumer choice in 2023 (65%). This is closely followed by scenery and landscape (62%), with choice of things to do, travel time, weather, availability and friends and family preferences all important for around a third of respondents.

The Covid situation is only a consideration for 6% of respondents.

Most important factors influencing choice of holiday in 2023	
Price	65%
Scenery and Landscape	62%
Choice of things to do	37%
Travel time	35%
Weather	31%
Friends and family preferences	30%
Availability	30%
Health	21%
Other (please specify)	9%
Safety	8%
Covid-19 situation and restrictions	6%

Source: Q 25 1248 responses excl. Dorset respondents
Q26: 1,729 all responses

Bookings and plans for 2023

Top locations booked to date

53% have already booked their main holiday for 2023 which means there is still a significant proportion of potentional visitors who could be influenced on their choice of holiday location.

UK domestic breaks remain a popular option but respondents are considering European and global locations as well, popular booked locations in the UK (excl. Dorset) include Yorkshire, Lake District, Devon and Cornwall

Source: Q 27: 1,729 responses and Q:28 entries coded from 914 free text responses

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Additional analysis

The following slides contain additional analysis on three sub-sets of visitors and highlight where the responses of these types of visitor were significantly different to the main sample on particular questions within the survey.

Please note the sample size of these additional segments is small and therefore the information can only be used as a guide for an overall trend. The results will contain a margin of error of +/- 9% at the 95% confidence level

Visitors travelling with a dog(s)

Those visitors that stated they have visited Dorset since 2021 and were travelling with a dog(s) had a few notable differences in their holiday behaviour and opinions. They were:

Accommodation – visitors with dogs were significantly more likely to be staying in a self-catering cottage or apartment (30%) or camping (30%) and very few choosing hotels (1%).

Activities undertaken – spending time at the beach (70%) and visiting an outdoor attraction (39%) were much higher than the main sample and visiting indoor attractions much lower (16%). They were also significantly more likely to have been walking (87%).

Their motivations differed slightly with a stronger emphasis on "spending quality time with friends and family" (61%) and "to get active and be outdoors" (30%).

They were much more likely to return to the same location in Dorset (80%) as well as being more likely to return to Dorset within the next year (61%). 72% are considering a break to Dorset in 2023.

They were also more frequent visitors to Dorset with a higher percentage saying they visit several times a year (36%) or once a year (33%).

They were much more likely to be travelling in a motorhome or campervan (11%) and unsurprisingly keen to see more dog-friendly places (87%).

Respondents who had been to Dorset since 2021 and were travelling with a dog(s) – total sample size 115 responses

Visitors travelling with children under 18

Those visitors that stated they have visited Dorset since 2021 and were travelling with children under the age of 18 had a few notable differences in their holiday behaviour and opinions. They were:

Accommodation – families were more likely to be staying in a self-catering cottage or apartment (22%), Holiday Park (21%) or camping (23%) and fewer choosing hotels (11%).

Activities undertaken – spending time at the beach was significantly higher (77%) and more visited an outdoor attraction (41%). They were also more likely to have been on a nature, wildlife experience or visited a country park (42%).

Their motivations had a much stronger emphasis on "spending quality time with friends and family" (77%) and "to have fun" also scored higher (37%).

They were more likely to rate value for money as good rather than excellent.

Respondents who had been to Dorset since 2021 and were travelling with children under the age of 18 – total sample size 136 responses . 24% of the sample were also travelling with children over the age of 18

Visitors travelling with children under 18

Those visitors that stated they have visited Dorset since 2021 and were travelling with children under the age of 18 had a few notable differences in their holiday behaviour and opinions. They were:

They were much more likely to return to the same location in Dorset (80%) or consider other Dorset locations (68%) as well as being much more likely to return to Dorset within the next year (68%). 71% are considering a break to Dorset in 2023.

They were also more frequent visitors to Dorset with a higher percentage saying they visit several times a year (32%) or once a year (35%).

They were more likely to be travelling in a car (80%) and keen to see more free activities (63%), outdoor activities (42%) and adventure products (14%)

Families said they were being more cautious as a result of the cost of living situation with a higher percentage stating they would look for special offers or discounts (58%), free things to do (57%), spend less eating out (44%) and cut back on spend whilst on holiday (38%).

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Respondents who had been to Dorset since 2021 and were travelling with children under the age of 18 – total sample size 136 responses . 24% of the sample were also travelling with children over the age of 18

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Visitors under 45 years old

Visitors that declared their age as under 45 years old at the end of the survey, this does include some families but also other traveller types. It also includes a mix of those that have been to Dorset since 2021 and those that have never visited

Younger visitors were more likely to say their motivation to travel was to spend quality time with friends and family (65%) and have fun (27%).

They were more likely to have travelled by train (13%) than other visitor groups.

Younger visitors would like to see more free activities (60%) and outdoor activities (40%) than the average respondent.

They were more likely to be looking for free things to do (60%) to counter the cost of living situation, as well as looking for special offers (53%) and spending less eating out (42%).

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Respondents who chose an age category under 45 on Q29 – total sample size 109 responses

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