

Place and Resources Scrutiny Committee

9 November 2023

Review of Dorset Council's Tourism Service For Review and Consultation

Portfolio Holder: Cllr S Gibson, Economic Growth and Levelling Up

Local Councillor(s): All

Executive Director: J Sellgren, Executive Director of Place

Report Author: Jon Bird
Job Title: Service Manager, Growth and Economic Regeneration
Tel: 01305 221895
Email: jon.bird@dorsetcouncil.gov.uk

Report Status: Public

Brief Summary:

This report provides an overview of how Dorset Council is driving and supporting its visitor economy through the work undertaken by its tourism team, Visit Dorset. It gives detail on the infrastructure in place to support this work and outlines the importance of tourism to Dorset's economy. The information is for review and consideration by the Place and Resources Scrutiny Committee. The key subject areas in this report were highlighted as being of particular interest to the Chairman of the Scrutiny Committee.

Recommendation:

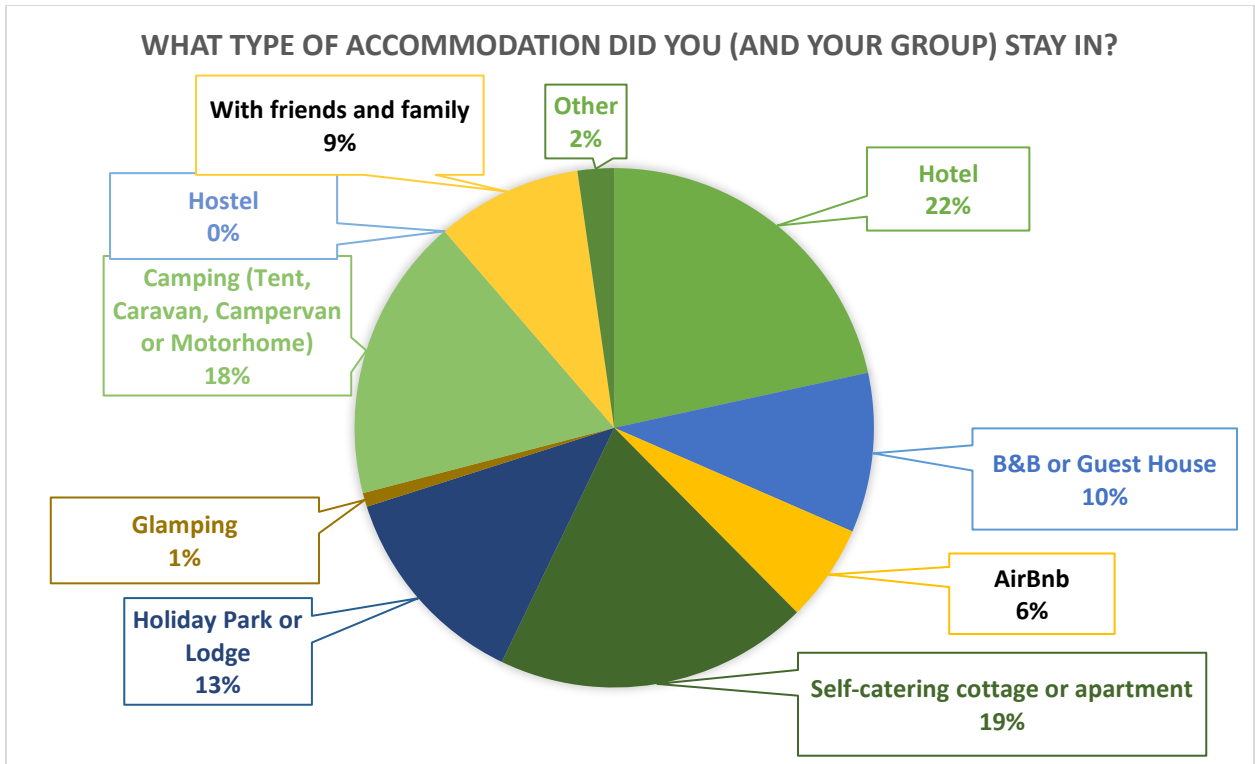
That the committee notes and comments on the information provided in this report.

Reason for Recommendation:

To provide a detailed report to the Place and Resources Scrutiny Committee to enable a review of the work of Dorset Council's tourism team and the support it provides to the local visitor economy. The report outlines how the work of the team delivers on the corporate priorities of making Dorset a great place to live, work and visit.

1. The Dorset Visitor Economy

- 1.1 Tourism is a key sector for the Dorset economy valued at approximately £1bn, providing a Gross Value Added of £0.8bn and supporting around 24,000 jobs in the Dorset Council area. In 2019, 17 million visits were made to Dorset as either a day trip or overnight stay.
- 1.2 A thriving visitor economy helps contribute towards delivering the key Dorset Council objectives of ensuring that Dorset is a great place to live, work and visit. Income generated from visitors supports facilities that benefit Dorset residents and improves their sense of place. It also raises valuable income for the council, for example through its car parks, to help maintain services.
- 1.3 The full economic impact report for the whole county of Dorset and the breakdown of the different areas within the county can be found here [Microsoft PowerPoint - Dorset & Districts 2019 \(simpleviewinc.com\)](https://www.simpleviewinc.com). This research was conducted by the South West Research Company.
- 1.4 Dorset's main visitor groups are families with young children who visit during the main summer months and older couples who tend to visit out of the main holiday season. Younger couples and groups looking for unique, good quality experiences in Dorset are strong and growing markets.
- 1.5 Dorset's main domestic markets have traditionally come from London, the South-East and the Midlands, although recent research, summarised below, also indicated that visitors were travelling from all over the country. During the pandemic, visitors were more likely to originate from across England, however the more recent cost of living crisis has resulted in more visitors from neighbouring counties as people aim to keep travel costs low.
- 1.6 Strong overseas markets to Dorset include Germany, the Netherlands, and the USA.
- 1.7 Visit Dorset commissioned the National Coastal Tourism Academy to carry out a consumer survey for Dorset between March and April 2023. The survey had a sample size of 2,359 respondents and gave a valuable insight into visitor behaviour and sentiment.
- 1.8 The chart below taken from the report illustrates the breadth of accommodation available in Dorset and indicates that all types are used by visitors.



1.9 Below is a short summary of some of the other key findings from the report:

- The main motivation for visiting Dorset was for relaxation, quality time with friends or family and to sightsee or explore
- 97% of respondents were satisfied with their break in Dorset
- 90% thought that their holiday was either excellent or good value for money
- 74% said they would definitely return to the same location in Dorset
- 59% would like more locally sourced food and drink on their holiday in Dorset
- 78% claimed that reducing their carbon footprint of making more sustainable choices on holiday was important
- In 2023, price was the top factor influencing consumer bookings, closely followed by scenery and landscape. The cost of living crisis meant that 43% of respondents were looking for special offers and discounts to combat the impacts and 67% felt the need to be cautious with spending.
- Dorset has a high level of loyal, repeat visitors, that visit all year round. They stay in a range of visitor accommodation from hotels, self-catering, camping and staying with friends.
- The majority of visitors travel to Dorset by car
- Respondents represented every county of England and 28% of survey respondents were from within Dorset demonstrating a significant and

important sector of local residents who enjoy spending time within their own county.

The full report can be found here: [England's Coast Consumer survey \(simpleviewinc.com\)](https://simpleviewinc.com)

2. **The Role of Visit Dorset**

- 2.1 The Visit Dorset Tourism team forms part of the Growth and Economic Regeneration Service within the Assets and Regeneration division. The team comprises of 5 full time equivalent staff and is the Destination Management Organisation (DMO) for Dorset. DMOs are organisations responsible for the development, marketing and support of England's tourism destinations.
- 2.2 Visit Dorset works with tourism businesses and local, regional and national partners including VisitEngland, the national government body for tourism, to support and grow the visitor economy in the Dorset Council area. The team represents over 400 businesses that pay an annual membership to Visit Dorset, as well as supporting the work of the wider tourism industry across the county.
- 2.3 The team aims to balance the economic benefits of tourism without compromising the quality of life enjoyed by residents and the county's unique environment.
- 2.4 The team promote Dorset as a high-quality visitor destination through a wide range of channels and lead on:
 - The development of www.visit-dorset.com; this is core to all tourism activity and is a comprehensive source of tourism information from all sectors of the visitor economy. It is recognised as the leading official destination website for Dorset, receiving 2.1 million annual visits.
 - Destination and place marketing for Dorset including: digital, social media, print and tourism related PR (public relations) and media activity.
 - Co-ordinating research projects to help support the industry and guide activity e.g.annual economic impact surveys.

- Supporting tourism businesses to grow and thrive; signposting training and skills opportunities to the Dorset tourism industry, organising business events and supporting the Dorset Tourism Awards
- Promoting and encouraging sustainability throughout the tourism industry with the aim of supporting the council's Climate and Ecology Strategy

3. **Visit-dorset.com and digital marketing**

- 3.1 The key tool for Visit Dorset promotional activity and tourism business support is the visit-dorset.com website, which was rebuilt on a new platform in 2021. The website ensures that Dorset is showcased to its full potential and offers the visitor a means to easily plan and book a holiday or day trip to Dorset.
- 3.2 Visit-dorset.com is a successful destination site and achieves over 2.1 million visits per year. The site is provided by Simpleview, an international website provider with clients across America and Europe. Visit Dorset was the first European client to move to the American platform with its superior functionality and is recognised as a leading destination site within the UK. The team recently won an award at the Simpleview annual summit in recognition of innovative use of digital content.
- 3.3 The team manage a range of social media platforms which alongside the website enable year-round digital promotion of Dorset to different target markets. Currently Visit Dorset has 41,376 followers on Facebook, 39,158 on Instagram, 18,463 on X as well as a presence on Tik Tok and YouTube. Facebook and Instagram followers have seen a strong growth over the last 3 years of 68% and 134% respectively. There are 23,267 subscribers to the Visit Dorset monthly e-newsletter.
- 3.4 The team are contracted to manage town websites for Sherborne and Lyme Regis on behalf of the Town Councils and will be launching a site for Swanage Town Council in early 2024. The town websites provide good value for money for the town councils as they benefit from the functionality of the main Visit Dorset site at a highly discounted cost as they sit under the main Visit Dorset site.

4. **The Visit Dorset financial model**

- 4.1 In 2023/24 the tourism service has a net forecast cost to the council of c.£270,000, as it is generating approximately £100,000 of income annually post-pandemic. This compares favourably with the budgeted net cost of £277,000, as both expenditure and income have reduced in recent years. Most of the income comes from tourism businesses paying a membership fee to feature on the visit-dorset.com website and work with the team. Income is also derived from offering promotional services to other organisations within Dorset such as town councils and Business Improvement Districts (BIDs).

5. Working in Partnership

- 5.1 Working in partnership with a variety of organisations is an important element of the work of the team. This collaboration enables an efficient use of limited resources and gives Dorset a voice at a regional and national level. Visit Dorset works with neighbouring authorities and across the south west to encourage spend across the region. Some examples include a major government domestic marketing campaign during the pandemic 'Enjoy Summer Safely', encouraging international visits and working together to co-ordinate south west wide influencer and PR trips.
- 5.2 Visit Dorset forms part of the Great South West Tourism Partnership (GSWTP) which consists of tourism leads from across the south west. The partnership meets fortnightly with the Head of Tourism for the Department of Media, Culture and Sport (DCMS) and VisitEngland. The partnership is key to co-ordinating regional marketing campaigns, collaborative impact surveys and joint lobbying to Government for industry support.
- 5.3 In 2021 the Great South West Tourism Partnership produced a regional strategy '[Towards 2030: Reimagining the Visitor Economy in the South West](#)'. This ambitious prospectus sets out priorities to drive economic growth in the region and focuses on key themes of seasonality, productivity, accessibility and sustainability.
- 5.4 The Great South West Tourism Partnership was awarded the Outstanding Achievement Award at the South West Tourism Awards for its support to businesses across the south west during the pandemic.
- 5.5 Visit Dorset works with the Dorset Tourism Association (DTA), a CIC trade organisation, representing tourism on the Dorset LEP with a remit to support and enable the delivery of its Dorset wide strategy. The DTA is a collaborative partnership with each sector of the visitor economy represented on the board alongside local authority officers and tourism

brief holders across the Dorset Council and Bournemouth, Christchurch and Poole (BCP) Council areas. The role of the DTA board is primarily to inform and to enable discussion and sharing of ideas across all sectors of the visitor economy, rather than being a delivery body. It is a valuable source of intelligence for the two local authorities on issues affecting the industry, which can then be fed back to the regional partnership, VisitEngland and government. Feedback directly from the industry is also very useful for the Visit Dorset team to inform marketing and business support activity.

- 5.6 The team works with BCP tourism colleagues to ensure a joined-up approach to tourism activity across the whole of the county. Both council teams are committed to promoting Dorset as a unique, high quality and accessible destination and are working together on a new government delivery model for tourism destinations – Local Visitor Economy Partnerships – explored further in section 6.2.

5.7 **Local Partnerships**

- 5.8 The team recognises the important role of Dorset's many local organisations which are essential to help bind Dorset's tourism industry together and collectively support the local visitor economy. Visit Dorset has built up a strong brand reputation over many years for being the lead tourism organisation to work with within the county to ensure successful partnership working.
- 5.9 Visit Dorset is contracted by Sherborne, Lyme Regis and Swanage Town Councils to provide them with their own town websites (microsites) using the visit-dorset.com website platform. The team has also established partnerships to provide marketing services to other towns and BIDS including Dorchester, Wimborne, Weymouth and the North Dorset tourism group as well as organisations such as the Dorset Museums Partnership and the Arts Development Company.

6. **Key Issues and challenges**

- 6.1 Tourism is a significant, competitive, and diverse sector of the economy, which is subject to a variety of challenges, many of these are external and beyond our control. By working in partnership and across the many other services and agencies that have an impact on tourism delivery, the team can help to guide and shape how the Dorset tourism service is delivered. There are some key challenges currently impacting on tourism service delivery that are highlighted below.

6.2 **Local Visitor Economy Partnerships**

- 6.3 In 2021 the Government commissioned an independent review of Destination Management Organisations (DMOs) across England. DMOs, such as Visit Dorset, are organisations responsible for the development, marketing and support of England's tourism destinations. Visit Dorset co-ordinated a response for the call for evidence from Dorset Council. [Background details to the review](#) are provided.
- 6.4 The results of the independent review indicated that there were 208 DMOs across England with varying size, structure and support. The Government response to the review in July 2022 recommended a new 3 tier system of DMOs:
- Tier 1: Destination Development Partnerships (DDPs) – c.15-20 of these eventually. One currently being piloted in the North East.
 - Tier 2: Local Visitor Economy Partnerships (LVEPs) – c.40 of these public/private partnerships. 25 LVEPS have been accredited since April 2023.
 - Tier 3: Non-accredited small, localised destination management and marketing organisations.
- 6.5 BCP and Visit Dorset are applying to become the joint Tier 2 LVEP for Dorset and are working with VisitEngland to meet the criteria. There is no other suitable organisation in Dorset that fits the LVEP criteria and neither local authority can become a Dorset LVEP on its own. A key part of the criteria for becoming an LVEP is to be able to demonstrate destination management by bringing together all elements of the local visitor economy to enable a strong public/private sector partnership. The two Dorset authorities would lead the LVEP activity but would work collaboratively with the Dorset Tourism Association and other private and public sector organisations within Dorset.
- 6.6 There are key benefits of Visit Dorset and BCP working together to form an LVEP. As well as achieving a nationally recognised accredited status, a new Dorset LVEP will provide strong leadership and destination management, enabling more collaborative work with the public and private sector across Dorset to help shape and deliver national strategy and activities at a local level. It will give Dorset the opportunity to work in a proactive partnership with VisitEngland, the government and other LVEPs across the country to ensure that the local visitor economy is an active and valued contributor to Levelling Up and the wider economy.
- 6.7 **Marketing rural Dorset**
- 6.8 Dorset is a diverse county boasting a stunning coastline with designated World Heritage status set against a backdrop of beautiful rolling countryside which includes over 436 square miles of Areas of Outstanding

Natural Beauty. The Jurassic Coast, UNESCO World Heritage Site, is a key attraction as it forms part of the South West Coast Path for visitors enjoying a summer holiday or short break along the coast. A key challenge for Visit Dorset is to promote the rural parts of the county away from the coastline and more well-known coastal towns and landmarks to help spread the benefits of visitor spend across the county.

- 6.9 Visit Dorset is addressing the challenge in several ways through specialist marketing campaigns such as promotion of Dark Skies, rural events, and businesses on social media, highlighting the uniqueness of rural Dorset. The team also collaborate with various local organisations to attract more visitors all year round.
- 6.10 The team manage a dedicated town website for Sherborne Town Council and are also working in partnership with the newly formed North Dorset Tourism Group (consisting of representatives from businesses, organisations, and councillors from across North Dorset). This is proactive partnership making good progress. Activities include:
- Hosting business events to encourage networking and raise awareness of how Visit Dorset can provide support.
 - Creation and hosting of a new interactive map of the White Hart Link Trail on visit-dorset.com highlighting reasons to visit and stay in North Dorset
 - Production of new high quality video footage of North Dorset for use in social media campaigns and dedicated pages for North Dorset on the visit-dorset.com website.
- 6.11 **Labour and skills challenges within the visitor economy**
- 6.12 There are skills and labour shortages in many areas of the local economy and tourism is no exception. This has both short and long term features, including an ageing and shrinking workforce. Businesses reporting labour and skills shortages are a real issue especially post Brexit and pandemic. Chefs and front of house staff are especially hard to recruit. Local schools and colleges offer a range of hospitality industry-related courses and work with employers to offer training programmes including apprenticeships.
- 6.13 The visitor economy provides approximately 15,000 jobs locally in accommodation and food service, and supports a similar number in retail, culture, and the arts. Average wages in these sectors are among the lowest in the county: Accommodation and food service workers earn an average of £15k p.a, compared with average salaries in Dorset's key sectors of Health and social care (£22k), manufacturing (£33k), and construction (£32k).

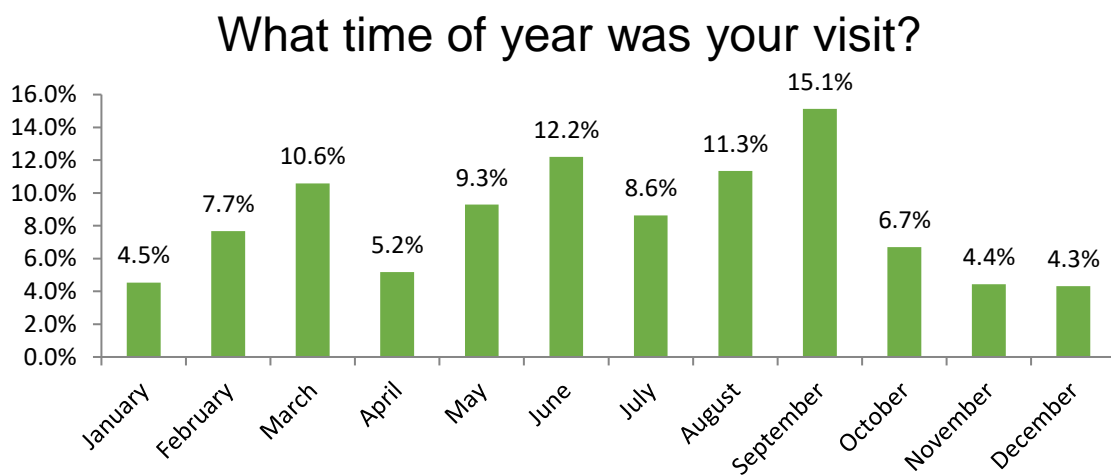
6.14 However, many roles linked to tourism are skilled, well-paid, and offer year-round work, including roles in IT, marketing, management, and high-level hospitality. While the recently published Dorset local Skills Improvement Plan does not include the visitor economy as a key sector, it does include creative/digital and the need for these skills across the workforce, including in the visitor economy. The industry is working to shift negative perceptions around job prospects in the sector.

6.15 Visit Dorset signposts to training providers and works closely with providers of complementary business support services such as Dorset Growth Hub.

6.16 **Seasonality**

6.17 Seasonality within the visitor economy is a complex global issue influenced by many external factors. This is high on the Great South West Tourism Partnership strategy agenda and full details can be found [here](#). For this report, a summary is provided of the key challenges and some of the activities that Visit Dorset can carry out to attract more visitors outside of the main holiday periods.

6.18 A key challenge to growth out of season is the lack of infrastructure in place for visitors during the off peak months. Many tourism related businesses close over the winter period, transport services are reduced and there are fewer events and activities on offer. This chart, from research conducted by the National Coastal Tourism Academy, shows when respondents to this survey visited Dorset across the year.



6.19 Visit Dorset is committed to extending the season by encouraging more off- peak visits through its marketing activity. A few examples of this work:

- Dedicated off peak campaigns working with tourism businesses for autumn, winter and spring breaks eg the recent 'Put a Dorset Spring in your Step' campaign
- Promoting unique events and activities that will encourage visits such as the Dark Skies campaign.
- Working with coastal resorts out of season to promote events and activities such as the Purbeck Walking Festival, Weymouth's heritage trails and off peak events

7. **Other Dorset Council services that support tourism service delivery**

7.1 Many services across Dorset council have an impact on the delivery of the tourism service. The following areas were highlighted by the Chairman to include in this report.

7.2 **Highway Maintenance during peak holiday periods**

7.3 A key issue highlighted by Chairman of the Scrutiny Committee was that of roadworks being conducted during peak holiday times. This is not within the remit of the Visit Dorset team and Dorset Council Highways team have provided the following response to this issue.

7.4 The traffic team administer the highway network management duty to manage the movement of highway traffic across the Dorset network efficiently. Amongst others, one consideration of permit applications is the timing of the work taking place. The traffic team take factors such as location, type of road, vicinity to facilities/amenities such as schools and the seasonal impact on the network into consideration when coordinating works.

7.5 Currently there are traffic sensitive roads across the network which are designated as tourist routes. However, the Department for Transport (DfT) criteria is changing, and a route will no longer be able to be solely designated as a traffic sensitive route because it is a tourist route. The next time that the traffic team review this, these routes will not exist.

7.6 The traffic team currently and in the future will continue to draw embargo areas around tourist attractions and towns in Dorset to limit the number of works that take place over key holiday periods. It is not possible to completely prevent all works over these periods, especially emergency works, however the traffic team do try to limit where practically possible works over holiday periods.

7.7 Corporate Communications campaigns

- 7.8 Visit Dorset's primary marketing role is to promote Dorset as a leading holiday destination to staying and day visitors and to provide inspiration about Dorset to residents to encourage and develop a sense of place.
- 7.9 The Corporate Communications Team has a remit to promote warning and informing and enforcement messaging on a wide range of Dorset Council issues.
- 7.10 Both teams work collaboratively, when appropriate, to amplify important messaging on key issues such as rock falls, major events and incidents or relevant issues such as the use of BBQs in sensitive areas or the ban on single-use plastics, so that businesses, local residents and visitors are aware and can plan accordingly.
- 7.11 As an example, the teams worked together during the pandemic on a major visitor management campaign 'Promise to Love' Dorset to encourage responsible behaviour in Dorset relevant to visitors and residents. The content was hosted on the Visit Dorset website and a targeted digital marketing campaign ran on our social channels. The campaign was put forward and won a national communications award for 'Best use of Research and Evaluation'.

7.12 Provision of Visitor Information

- 7.13 Historically, the Visit Dorset tourism team have not had any direct responsibility for the delivery of Tourist Information Centre (TIC) provision across Dorset. The TIC teams were part of a separate 'Visitor Services' team at Dorset Council's Partnership and other District Council's funded and ran their own TICs.
- 7.14 Following Local Government Reorganisation in April 2019, the Tourist Information Centre service was placed within the Libraries Service in Dorset Council.
- 7.15 In March 2021 Dorset Council took the decision to close the 3 remaining local authority managed Tourist Information Centres in Dorchester, Sherborne and Wareham following a service review and consultation and agreed to transfer the service to local alternative delivery models.
- 7.16 Dorset Council officers from the libraries service worked with the 3 town councils to agree alternative service provision and contributed to the transition with a one-off payment to support implementation.
- 7.17 Links are provided to the previous Overview and Cabinet reports and decisions:

[Overview Committee: 25 February 2021](#)

[Cabinet Decision: 2 March 2021](#)

[Post implementation review for Alternative Service Delivery of Tourist Information Centres in Dorche.pdf \(dorsetcouncil.gov.uk\)](#)

- 7.18 The Visit Dorset team works closely with Town Councils and BID's to support local tourism activity. This is achieved through the management of town websites and providing marketing services to various tourism organisations, town councils and BID's to ensure visitors can access up to date information on all areas within Dorset.
- 7.19 Visit Dorset is a strong brand which forms part of a national portfolio of destinations that work with VisitEngland. The brand goes across the visit-dorset website and social media platforms and is recognised by visitors to Dorset as one of the main places to find information.
- 7.20 TICs have traditionally been a valuable source of information to visitors once they have arrived in an area. Consumer habits have changed at a rapid pace over the last few years and it is now normal to expect to research and book visits and find out the latest information using online methods. There are many booking platforms available on the website including Booking.com and Expedia and website information is kept up to date daily.
- 7.21 Although there could be a concern about older age groups not being able or wanting to access information in a digital format, the pandemic and changing habits mean that this age group are now much more familiar with using digital resources. Most respondents to a recent Visit Dorset survey which was promoted through Facebook were in the 65 plus age bracket. Analysis of visits to the website indicate an even split of users across all age brackets.
- 7.22 The Dorset Council area has TICs funded by Town Councils (Bridport and Swanage), TIC's receiving part funding from Town Councils (Shaftesbury, Wimborne, Blandford) or Tourist Information Points (unmanned leaflet displays) often supported by Business Improvement Districts (BID's).
- 7.23 This is a similar approach to that found across Devon, Cornwall, and Somerset where there are only a few TICs remaining that receive Local Authority funding. Evidence shows that most TICs in the South West are either supported by local parish or town councils, CICs or voluntary organisations.
- 7.24 Visit Dorset offers a supportive approach to TICs across Dorset. All TICs are promoted on the visit-dorset.com website and staff have access to edit

their own information. TIC staff are in regular contact with Visit Dorset and use the team and website for information and signposting. Likewise, the TICs are a valuable source of 'on the ground' information for Visit Dorset.

- 7.25 Over the last few years TICs have also refreshed their own ways of working and have much more of a community focus offering information and services to residents. To further emphasise this many have updated their brands and identities and have renamed themselves as 'information hubs' or 'information centres' moving away from the primary focus on visitors.

8. Financial Implications

- 8.1 Visit Dorset's current annual operating costs are approximately £370,000. These are partially offset by income generation of approximately £100,000, so the annual net cost to the council is c.£270,000. It is the professional opinion and experience of Visit Dorset and Economic Growth and Regeneration officers that combining the functions of commercially focused marketing, advertising and PR activities alongside the public policy-supporting activities, as described in previous sections, provides benefits that would be more difficult to achieve if the functions were separate.
- 8.2 Dorset Council must use its resources efficiently. Recent budgetary pressures - including a predicted overspend of c.£12 million - make ensuring cost-effective delivery ever more important and urgent. While not a statutory service, Visit Dorset is key to delivering actions in the Dorset Council Driving Economic Prosperity Delivery Plan ([Driving economic prosperity delivery plan - Dorset Council](#)), around the theme of making Dorset "The Natural Place to do Business", attracting inward investment to create jobs and wealth for local people", including the actions: *By 2024, Dorset will have formed a local visitor economy partnership with a range of local partners to address strategic challenges to the sector and access government support and funding* and *By 2023, the 'Visit Dorset' suite of websites will be receiving over 2 million visits a year, raising the global profile of Dorset*, alongside a more general role ensuring Dorset's interests are included in national and regional policy and funding decisions.
- 8.3 The Place and Resources scrutiny committee has previously considered Dorset Councils commercial transformation program. The committee will recognise the ambition to become increasingly commercially minded and the challenge to services to become self-funding where possible. 'Visit Dorset' is an example of where this thinking needs to be applied. Members of the scrutiny Committee are invited to suggest opportunities for income generation which could be used to reduce (if not eliminate) the need for Visit Dorset to be subsidised by the taxpayer.

9. **Natural Environment, Climate & Ecology Implications**

No impact.

10. **Well-being and Health Implications**

There are no well-being and health implications to this report.

11. **Other Implications**

There are no further implications to this report.

12. **Risk Assessment**

12.1 **HAVING CONSIDERED:** the risks associated with this decision; the level of risk has been identified as:

Current Risk: No risk

Residual Risk: No risk

13. **Equalities Impact Assessment**

There are no equalities implications arising from this report.

14. **Appendices**

15. **Background Papers**

A link to the [National Coastal Tourism Academy Consumer Research](#), referenced throughout this report.

The full economic impact report for the whole county of Dorset and the breakdown of the different areas within the county can be found here [Microsoft PowerPoint - Dorset & Districts 2019 \(simpleviewinc.com\)](#). This research was conducted by the South West Research Company.

Please note: 2022 data is due later this year. 2019 is being used as the next best dataset being a pre-pandemic year. 2020 and 2021 were drastically affected by Covid-19 with lockdowns and restrictions to travel and are not representative of a normal year.