Today’s Presentation

We will look at:

• Our current review
• The future direction of Cornish tourism
• Growth Trends and “Wise Growth”
• Visitor motivations
• Market trends and likely developments
• Our Next Steps
To establish clear market trends and developments:

To help drive/shape development of tourism in Cornwall.

To steer Visit Cornwall’s destination and tactical marketing activities over the next decade

To help our members with the continuous improvement of their marketing and the quality of their offer and services

To inform and inspire our members on how they might shape their business development plans.

To help engage, inform and influence “decision makers” and influencers to support and assist the wise growth of tourism in Cornwall.

To engage through public relations and communications with the residents of Cornwall in projecting the benefits of tourism and this wide growth agenda.

To contribute and inform the regional and national tourism strategies and priorities
How – Research review plus new focus groups

When – Late 2018 to spring 2019

Where – Cornwall, South West, UK & Overseas

Who – Young and Old, Large & Small businesses
WHAT - OUTCOMES

• A widely shared and understood view on the future direction of Cornish tourism and its development

• A destination marketing direction for Visit Cornwall

• Guidance, thoughts and ideas for our members sector by sector ie what the future is likely to be for their business

• Identify potential trailblazer projects and initiatives
Projections for Growth
Staying Visitor Trips in 2030

An additional 510,000 trips per year (10%)

An additional 1,000,000 nights per year (5%)
Day Visitors

An additional 2,000,000 day visits per year by 2030 (13.6 %)
Additional Visitor spend

£521,000,000 extra per year in 2030 (26%)
Employment Growth

An additional 8,000 new jobs

62,190 by 2030 (14.8%)
Growth Projections and Implications

- Summer Capacity Issues
- Multiple Niches
- More about “experiences”
- Majority of Growth must be out of peak – AirBnB Growth !!!
- Transport Infrastructure
- Product Development needed
  - Spring events
  - New services
- Ageing customer base and impact on accommodation, activities, opportunities and motivations
- Need to ensure **Wise Growth** that works for Cornwall, Residents and Businesses
Wise Growth

The Principles
Wise Tourism Development Principles – “VERB”

V  Visitors - Value - Volume.

E  Environments

R  Residents

B  Businesses.
Wise Tourism Development Principles – “VERB”

V

Our Visitors
Wise Tourism Development Principles – “VERB”

V

Our **Visitors** are delighted with the experiences and services they receive and who respect what local communities treasure and want them protected and improved.
Wise Tourism Development Principles – “VERB”

V Value over Volume - so that Cornwall maintains and improves its “premium price” position and top UK holiday region and growing international destination.

Value =
- Filling Empty beds
- Getting and maintaining a Premium Prices across the range
- High levels of customer satisfaction
- High levels of repeat and returning customers
- New customers from UK and Overseas markets

Volume =
- Growth in non peak periods
Our **Environments** Natural, Ecology, Cultural, Built, Public Realm are protected and improved to enhance the quality of life of Cornish residents and maintain and improve the attractiveness of Cornwall to selected tourist markets.
Residents that accept (and where many welcome visitors) and where there is an acceptable level of impact on their day to day lives. Residents benefit from the facilities and services supported through tourism.
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Wise Tourism Development Principles – “VERB”

Q9. To what extent do you think tourism is good for your area? Would you say it is...

Of the majority who feel that tourism is good for the area, nearly 2/3rds believe it is of great benefit to the area.

Range from 33% in Newquay to 88% in Bude
Wise Tourism Development Principles – “VERB”

Businesses that are competitive, profitable and able
investment in the continuous improvement in services, new
facilities and equally important business productivity, skills
and staff/management development.
Wise Tourism Development Principles – “VERB”

V  Our Visitors are delighted with the experiences and services they receive and who respect what local communities treasure and want those protected and improved.

Value over Volume - so that Cornwall maintains and improves its “premium price” position and top UK holiday region and growing international destination.

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R  Residents that accept (and where many welcome visitors) and where there is an acceptable level of impact on their day to day lives. Residents benefit from the facilities and services supported through tourism.

B  Businesses that are competitive, profitable and able investment in the continuous improvement in services, new facilities and equally important business productivity, skills and staff/management development.

Visit Cornwall
So What Does this mean “Simples”

- We to maximise the positives
- Remove (or minimise) the negatives
Tourism in Cornwall will be Growing

We need to ensure we get the *tourism we want*

Or we will get the *tourism we get*
Tourism We Want

It will be a team game, but the sector can and should lead.

We need other to support our efforts by understanding where the direction of development
“Maxing” the Positives

- **Targeting and Matching** best markets and segments to Cornwall and letting other opportunities go by when bad match

- Build more wide ranging and **deeper “experiences”** – real and authentic

- **Building on quality** of Experience in the round - Premium Destination = price position

- The right customers at the **right time** (Spring, Autumn, Winter) in the **right places** (spread the load)

- Through Life value

- Build Loyalty
Tackling the Negatives

• Seasonality

• Over supply leading to “overtourism” leading to
  – adverse local community reaction
  – Reduction price obtained
  – Risk of decline in quality re oversupply
  – Congestion
  – Straining Infrastructure

• Job/progression re quality of employment

• Treasury gain vs local pain
Trends and the Future
So what does this mean for our businesses

We have started to pull together trends, new markets and what will be happening to existing markets
Bringing Information and Creating Market Insights and thoughts

Cornwall Visitor Survey 2018/19
Quarterly Update Report
Summer & Autumn Interviewing Periods 2018
Produced for and on behalf of Visit Cornwall
By
The South West Research Company Ltd.

Cornwall Trends Report 2011 - 2017
Looking Ahead – Forecasts 2018 - 2030

Visit Cornwall

Market Research Report
For Cornwall Development Company
Community Attitudes Survey 2012

VisitEngland
The Future Travel Journey
Trends for Tourism Product Development

Top 10 Global Consumer Trends 2019
ALISON ANGUS AND DINA WESTROOK
Let us Look into the future
The Death of Deference to Age
Does age or conventions matter anymore?

Life and Ageing gets in the way!
Does age or conventions matter anymore?

Life and Ageing gets in the way!

- Relationships/partners
- Employment - Careers – well being/mindfulness
- Children
- Dogs !!
- Health issues – fit days
- Accessibility – not just wheel chairs
- Ageing generally – the bones

Visit Cornwall
What will life be like in 2025
## Aging Segments

<table>
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<th>Segment</th>
<th>2020</th>
<th>2025</th>
<th>2030</th>
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<tr>
<td>Older</td>
<td>75 – 90</td>
<td>80 - 95</td>
<td>85 - 100</td>
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<td>Baby Boomers</td>
<td>60 - 75</td>
<td>65 -80</td>
<td>70 - 85</td>
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<tr>
<td>Gen x</td>
<td>40 - 60</td>
<td>45 - 65</td>
<td>50 - 70</td>
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<tr>
<td>Millennials</td>
<td>20 - 40</td>
<td>25- 45</td>
<td>30 - 50</td>
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<tr>
<td>Snowflakes</td>
<td>5 - 15</td>
<td>10 - 20</td>
<td>15 - 25</td>
</tr>
<tr>
<td>Not Known</td>
<td>0-5</td>
<td>5 - 10</td>
<td>10 - 15</td>
</tr>
</tbody>
</table>
• Some Cornwall Populations Growth

• Growing market for Real authentic experiences

• Far more about **what will we do** and then where do we stay

• Possible **Over tourism Issues** – AirBnB +

• **Booking Patterns Changing** short break self catering etc

• **Technology Changes** and 5/6 G or for some it being put back in its box JOMO — easy to book experiences etc

• **Eating and Food** – veganism, vegetarianism, allergies, intolerances – everyone must have a great meal not second best

• **Ageing Population**

• Further **Ethnicity Changes** especially family market 2\(^{nd}\) and 3\(^{rd}\) generation

• Road, rail and air **route improvements**
Looking at past interests and adding current trends
No lots of small developments

LITTLE THINGS MEAN A LOT
Current and Emerging Consumer Trends
The boundaries of old age are shifting as people live longer and take better care of their health, appearance and wellbeing. People do not want to feel old. It is all about the emotional treatment and handling of ageing.
The Senior Market in 2025

AGE AGNOSTIC

Older people want to feel, behave and be treated as younger

80-95
The boundaries of old age are shifting as people live longer and take better care of their health, appearance and wellbeing. People do not want to feel old. It is all about the emotional treatment and handling of ageing.

AGE AGNOSTIC
Older people want to feel, behave and be treated as younger.
The Gen X in 2025
45-65

AGE AGNOSTIC
Older people want to feel, behave and be treated as younger
Millennials in 2025
25-45

AGE AGNOSTIC

Older people want to feel, behave and be treated as younger
AGE AGNOSTIC
Older people want to feel, behave and be treated as younger

Gen Y in 2025
20 - 30

Snowflakes in 2025
10 - 20
Back to basics for status
Less is more
Cornwall can be a leader in minimum or guilt free tourism.
More Marketing and Communications Challenges ahead!
The Blue and Green Gyms

Come to Cornwall and find yourself!
Health, Wellbeing Mindfulness and much more across all ages
The push for a plastic-free society has gained momentum, consumer desire for a plastic-free world will grow. Plastics, such as single-use packaging for food and beverages and micro-plastics found in beauty, personal and home care, as well as plastics produced by the fast fashion industry, are coming under increased scrutiny.
The Amazon Prime Effect

I WANT IT NOW!
Efficiency-drive lifestyles and frictionless experiences
Opportunities and Challenges
The Output

- Guidance, suggestions and thoughts for each sector
- Projections and implications for stakeholders and authorities
• Summit and reactions
• More research due Young People and Arkenford
• Focus Groups in Cornwall and in target markets
• More on public realm, productivity/business growth, skills, progression and careers and influencing partner organisations
• Report writing
• What does this mean for
  • Sectors
  • Partners
  • Cornwall Council LEP
Tourism 2030 and Beyond

The Cornish and their visitors

Visit Cornwall