a place for life
Tourism, benefitting one and all

Cornwall’s visitor economy strategy
2014 to 2020
This consultation draft has been produced by Cornwall Council and the Visit Cornwall Partnership following the 2012/13 Tourism Review. It seeks challenge and endorsement from partners and businesses involved in this complex and important sector. The framework seeks to confirm key priorities, areas for action and a shared responsibility for success.
Kernow yw pow bryntin rag bewa, oberi ha visitya ynno.

Cornwall is a great place to live in, work in and visit.
Cornwall’s Visitor Economy is a success. Sector investment has transformed Cornwall from a high volume, low value mass market to a higher value, lower volume and multi niche market that is far less seasonal. Cornwall is ranked number one for visitor satisfaction, brand ranking, repeat business and loyalty. Our strengths lie in our landscape, coast, beaches, heritage and culture, built on our distinctiveness. Visitors see the Duchy as having a unique identity, as a distinct region in our own right, and ‘part of England, but not really England’. Our weaknesses are well versed; there is a productivity challenge to end the traditional low pay, low output sector, to end reliance on part time, seasonal employment, to cease affecting local housing affordability and the strain on public services due to the 4.5 million staying visitor trips.

Our coastal towns and beaches get most of the visitor attention, the product elsewhere in Cornwall is less well developed and resourced. Our competitors are busy capturing new, high-spending customers and developing new and emerging niche markets, especially within cultural tourism, international visits and a year round offer, they must not beat us at our own game.

Things are changing, not only in Cornwall. Reducing public sector budgets mean that future investment is more uncertain, making markets less reachable, unless we all work as one.

The importance of tourism is widely recognised by the resident population of Cornwall, with 89% of people agreeing with the statement that tourism is “good for the area”, whereas only 4% stated it is “bad” for Cornwall. Similarly, 30% stated that tourism has a “positive impact” on their lives, with 13% saying it has a “negative effect” and 54% believing it has a “neutral” impact on their lives.
Making our visitor economy work, for everyone

We want a **high quality, highly productive and resilient sector** so that:

- In a poor year the sector is commercially viable;
- In an average year the sector is profitable and can reinvest to stay competitive;
- In a good year, profits are very good and step-change investment and developments can be undertaken.

This will ensure that the visitor economy can not only continue to be a significant contributor to the Cornish economy, but also grow, increasing its contribution to GVA and economic well being in Cornwall, transforming business and delivering well paid, full time jobs.

There are lots of things we could be doing to achieve this, but we can't do everything. How do we choose the priorities? We have outlined four high level priorities for Cornwall where we should focus our efforts, together:

1 **The Foundations**
   **Our assets**: we need look after and improve the foundations of our past and future success; our landscape, environment, culture, heritage and our Cornish distinctiveness;

2 **The Visitor Experience**
   **Quality**: We must continually improve, as well as deepen and broaden, the quality of the visitor experience; cultural tourism, outdoor leisure, food and drink, events;

3 **The Basics**
   **We need to get the basics right to ensure we meet, if not exceed, the expectations of our existing and new visitors; accommodation, public realm, visitor services and facilities;**

4 **The Means to the End**
   **Marketing**: We must use world-class destination marketing, combined with digital technologies and communication, to secure the volume and value of tourism sought from targeted segments/markets.
Left: Mud Maid at the Lost Gardens of Heligan, photo Julian Stephens © Heligan Gardens Ltd.
Right: Kneehigh Theatre performing Tristan and Iseult at Restormel Castle
How will we achieve this

To deliver the desired results we have to focus on the following key enabling actions:

**Protect and enhance our natural and built Environment**
- High quality public realm, beaches, coastal path, heritage, museums, festivals and events and cultural assets, visitor services and facilities

**Develop cultural product**
- Cultural tourism development, arts, museums, World Heritage Site, Celtic/Cornish, itineraries and food and drink
- Sports and active leisure, cycling, walking, water sports, nature-based, country sports, fishing
- Festivals and events

**Enhance research and market intelligence**
- Knowledge acquisition of market/business insights combined with effective sharing and resulting in actions
- Existing and non-visitor research, business benchmarking
- New market research, competitor analysis

**Innovate destination marketing and communications**
- Destination marketing (national/international/niche)
- Film and TV production liaison and support
- PR, media relations integrated with leading edge web site
- Effective and innovative use of digital and social media channels

**Redefine industry-led approach**
- Review of structures, their governance arrangements, funding and resourcing in order to create a more business driven industry lead
- Access to finance, sector specific business support, skills and careers development

**Note**
These high-level action areas need to be achieved through a structured approach, based on a delivery matrix which details specific activity together with primary/lead organisations, delivery partners and funding sources. Each of the areas for action require an annual operational plan with clear, specific objectives, resources and funding identified, together with Key Performance Indicators, and monitoring/evaluation processes.
### Priorities

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### Actions

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### Impacts

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<th>Less Seasonal</th>
<th>Increased visitors spent</th>
<th>More bed nights</th>
<th>Improve sector employment</th>
<th>Maintain Cornwall destination ranking</th>
<th>Maintain Cornwall brand ranking</th>
<th>Increase Heritage and Culture segment market share</th>
<th>More sector businesses accessing funding streams (EU/National)</th>
<th>More cultural activity participation</th>
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A high quality, highly productive and resilient sector where:

- In a poor year the sector is commercially viable;
- In an average year the sector is profitable and reinvests to stay competitive;
- In a good year, profits are very good and step-change investment and developments are undertaken.

The visitor economy increases its contribution to GVA and economic well being in Cornwall, transforming business and delivering well paid, full time jobs.
Left: Pasty shop. Credit: Matt Jessop
Above: Hurlers Stone Circles, Minions, Bodmin Moor
Measuring success

Whilst macro-economic conditions (and the weather) greatly impact on the local visitor economy, we have a duty to measure the impact of our interventions. Broadly, this will be monitored through headline measures that relate to the sector’s business output (GVA), productivity, levels of pay and the quality of jobs:

**Sector GVA Growth in Cornwall**
GVA increase per year (from £770 million)

**Sector Earnings Increase**
Average earnings increase per year (from £9,800*)

**Sector Productivity increase**
GVA per person employed increase per year (£17,877*)

**Sector Jobs development**
Full time / Part time employment ratio (45:55*)

This monitoring will be enhanced by a range of detailed indicators, including:

- Staying visitors (4.5 million)
- Seasonal breakdown
- Bed nights (25 million)
- Visitors spent (£1.86 billion)
- Sector employment (42,300)
- Cornwall destination ranking (Best UK Holiday Region, British Travel Awards 2009-2013)
- Cornwall Brand ranking (No 1 Visit England Brand, 2013)
- Public sector / Private sector leverage
- Visitor Spend breakdown (International/Niche/Culture/Activity)
- Heritage and Culture segment market share
- No. of sector businesses accessing funding streams (EU/National)
- Increase (15% over 5 years) the Arts Clients turnover
- Annual local participation in cultural activity

* Accommodation and Food Services sector figures used as proxy indicator for visitor economy, representing 62% of the wider sector.
Evidence

Reports
1. Strategy Context
2. SWOT Analysis
3. Volume and Value of Tourism in Cornwall 2012
4. Visit Cornwall Visitor Survey reports
5. 2012 Beaufort research
6. 2013 Arkenford Research
8. Competitor Evidence Report
9. Cornwall Resident Attitudes Survey 2012 – Power Marketing
11. Cornwall Tourism Trends Report – South West Research Company
12. Cornwall Council Tourism Review 2012/13

Other references
a. 1st February 2013 Environment and Scrutiny Committee Report
b. Towards 2015 – SW Regional Tourism Strategy
d. European Policy Report on Competitive and Sustainable Tourism
e. CITFA Report on Tourism funding by Local Authorities
f. Travel and Tourism – Oxford Economics
g. Colorado report on impacts of destination marketing
Available on www.visitcornwall.com
Photo: Watergate Bay
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