England's Great South West
TOURISM PARTNERSHIP

TOWARDS 2030

REIMAGINING THE VISITOR ECONOMY IN THE SOUTH WEST

THE GREAT SOUTH WEST TOURISM PARTNERSHIP PROSPECTUS TO BUILD BACK BETTER

CONTENTS

EXECUTIVE SUMMARY

THE SOUTH WEST DESTINATIONS OF CORNWALL, ISLES OF SCILLY, DEVON, DORSET AND SOMERSET COMPRISE THE LARGEST STAYING UK VISITOR MARKET (OUTSIDE LONDON), GENERATING AN ANNUAL VISITOR SPEND OF £7.1BN (PRE-COVID-19).

The sector represents **9% of all Gross Value Added (GVA) for the region** and supports the wider economy through the supply chain and most notably the food production industry across the South West. The Visitor Economy directly supports **more than 133,000 full time equivalent jobs**, stimulates a **dynamic environment** to do business, **encourages inward investment** and delivers a **quality of life** for its residents that is unrivalled in the UK.

The Visitor Economy has been significantly impacted by Covid-19, the sector lost 52% of all revenue in 2020 equivalent to approximately £3.7 billion of anticipated tourism business turnover and a further £798m loss in supply chain revenues, with further substantial losses to date for 2021.

Working collaboratively as the Great South West Tourism Partnership, the sector has joined together to support the industry and develop **a hard-hitting and ambitious prospectus to Build Back Better and reimagine the Visitor Economy in the region.**

This Action Plan will drive economic growth and development to 2030 and beyond, **address the recurrent challenge of seasonality, reduce the carbon footprint of the industry and improve accessibility** to resolve the long-standing issues of market failure and inequality in the Visitor Economy.

> **"TOWARDS 2030: REIMAGINING THE VISITOR ECONOMY IN THE SOUTH WEST" MAPS OUT AN 18-MONTH STRATEGY TO RE-ENERGISE THE VISITOR ECONOMY AND STEER IT IN A NEW DIRECTION.**

The South West has the potential for significant off-peak growth in its Visitor Economy. With investment and support by 2030 **the Visitor Economy could**:

- **Generate a tourism spend worth £9bn** – £1.9bn more per annum than pre-Covid-19
- **Directly support more than 199,000 individuals employed in the Visitor Economy**
- **Save more than 138,000 tonnes of carbon, achieving significant gains towards the net-zero target**
- **Generate £451m additional VAT income to the Treasury**
- A £10 million investment in this Plan would achieve an ROI of **51:1 per annum.**

"Towards 2030: Reimagining the Visitor Economy in the South West" provides key strategic priorities **aligned to the Government's Build Back Better and Levelling Up agenda**, namely to deliver **clean and inclusive growth to achieve Net Zero** and to be the **most accessible and inclusive destination in the UK.** Furthermore, **this Plan will address seasonality and improve productivity**, creating a genuinely year-round Visitor Economy that is safe, clean and legal and **increase the spend achieved per visitor.**

The proposed activity will improve connectivity within the region, but also **build the resilience of the sector, improve Skills and Employment, and promote the region through regional Marketing and Communications campaigns** to new growth markets.

The Great South West Tourism Partnership (GSWTP) is an inclusive, equitable alliance that draws together the strength, knowledge and expertise of the leading DMO and tourism organisations in the Greater South West Area. The partners in this region have a proven track record of collaborative working and are keen to ensure that the sector does not simply recover to pre-Covid levels but seizes the opportunity to reinvent and address long-standing structural issues at a regional level.

The ambitions of this Action Plan will ensure that the South West remains the number one visitor destination in the UK, grows its international visitor market and significantly strengthens the Business Events programme in the region aligned to the key vertical growth sectors.

The Visitor Economy includes hospitality, accommodation, attractions, transport, retail and the supply chain that supports the industry

2019 HEADLINES

LARGEST STAYING VISITOR MARKET
(OUTSIDE OF LONDON)

£7.10BN
VISITOR SPEND IN 2019

SUPPLY CHAIN REVENUE £3.4BN

VAT INCOME OF £1BN IN 2019

DIRECTLY SUPPORTS 175,068 ACTUAL JOBS

IMPACT OF COVID-19

-52%
AVERAGE DECREASE IN TOURISM BUSINESS TURNOVER

£3.7 BILLION LOST DIRECT BUSINESS TURNOVER

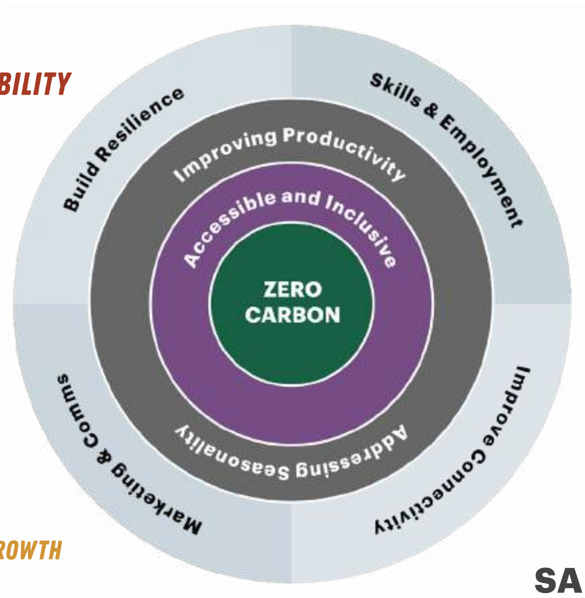
£798M ADDITIONAL SUPPLY CHAIN LOSS

TOWARDS 2030: BUILDING BACK BETTER AND LONGER TERN GROWTH

BUSINESS SUPPORT
FOCUSED ON NET ZERO, ACCESSIBILITY AND DIGITALISATION

PARTNERSHIP WORKING TOGETHER TO LOBBY FOR IMPROVEMENTS TO SKILLS, NET ZERO AND ACCESSIBILITY

MARKETING CAMPAIGNS
SUSTAINABLE, ACCESSIBLE, DOMESTIC GROWTH MARKETS AND OVERSEAS VISITORS



PRODUCT DEVELOPMENT
EXPERIENCES, WELLBEING, CULTURE & BUSINESS EVENTS

STRENGTHEN LOCAL SUPPLY CHAIN

DATA AND RESEARCH PROGRAMME

SAFE, FAIR AND LEGAL

2030 FORECAST AND RETURN ON INVESTMENT

£9BN
VISITOR SPEND

VAT INCOME OF £1.3BN

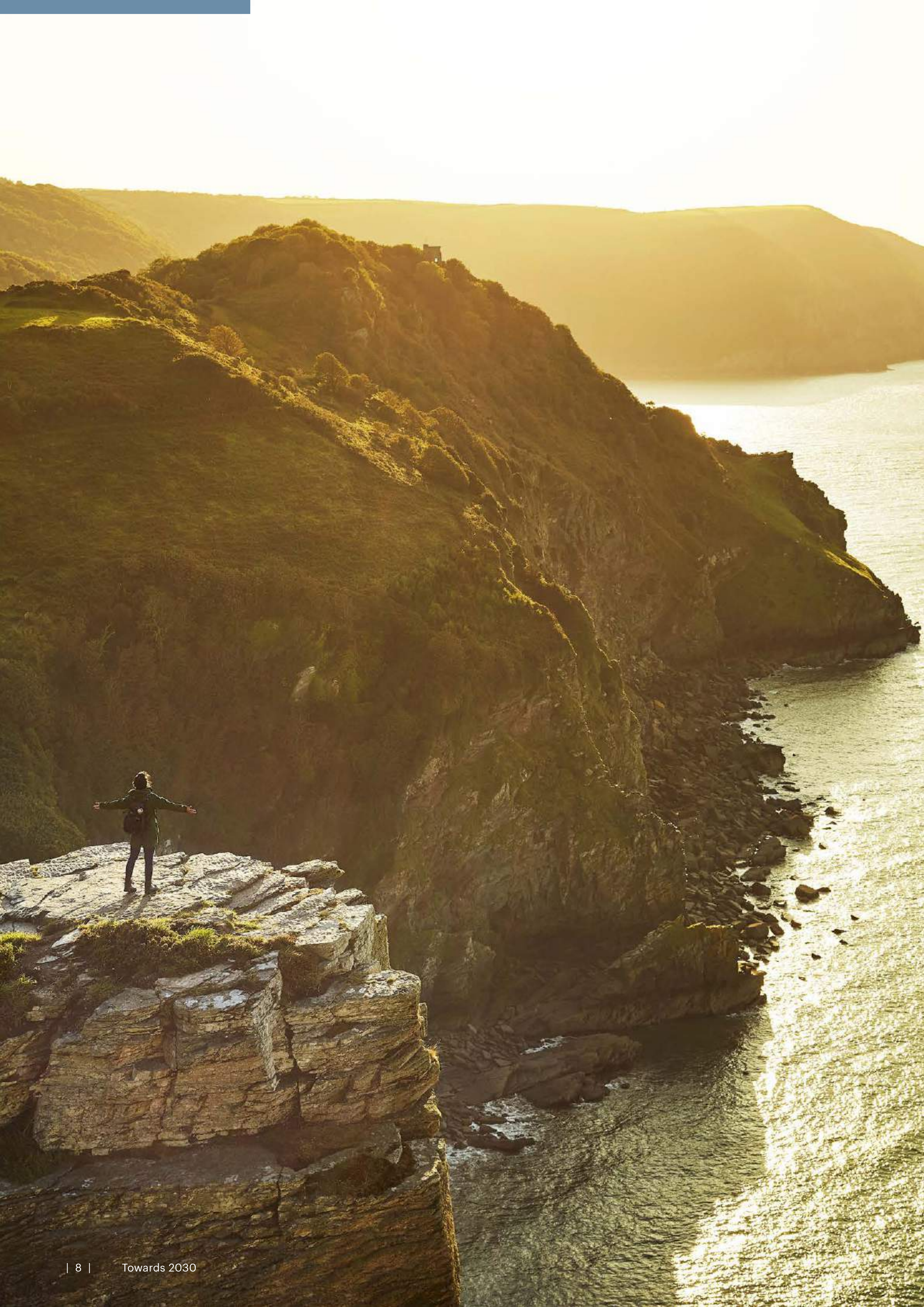
SUPPORTING 199,412 ACTUAL JOBS

BASED ON AN INVESTMENT OF £10 MILLION FOR THIS INITIAL 18-MONTH ACTION PLAN AND THEREAFTER ASSUMING AN INVESTMENT OF £6.5 MILLION PER ANNUM, THE OVERALL RETURN ON INVESTMENT WOULD BE 51:1 BASED ON THE INCREASED VISITOR SPEND.

WE'RE SEEKING INVESTMENT

The Great South West Tourism Partnership is seeking an initial investment of £10 million to deliver this 18-month programme of work followed by subsequent investment, which will provide an estimated Return On Investment of 51:1 in visitor spend. Investment would develop a year-round, zero carbon and accessible Visitor Economy in the South West to ensure it remains the UK's top visitor destination.

THE VISITOR ECONOMY IN THE SOUTH WEST



VOLUME AND VALUE

£7.10BN
VISITOR SPEND IN 2019

DIRECTLY SUPPORTS **132,777** FTE JOBS

84.9M
DAY VISITS

14.8M
DOMESTIC OVERNIGHT VISITS

£5.2BN GROSS VALUE ADDED (GVA)
9% OF TOTAL GVA

14,060
ESTABLISHMENTS

1.4M
OVERSEAS VISITS

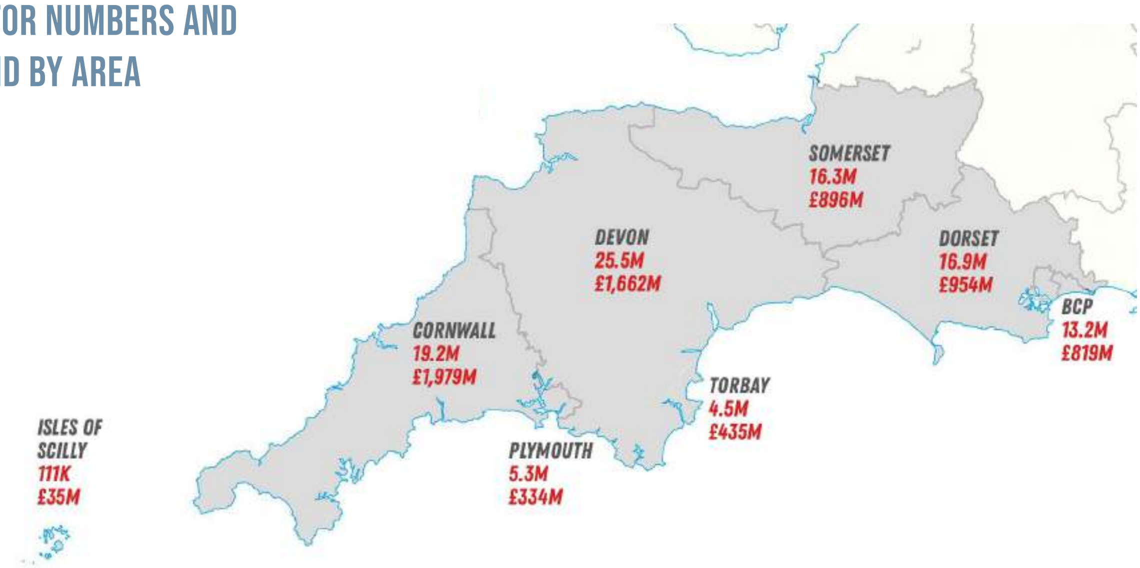
The Great South West Tourism Partnership (GSWTP) member destinations covering Cornwall, Isles of Scilly, Devon, Plymouth, Torbay, Somerset County, Dorset and Bournemouth, Christchurch and Poole comprise the largest staying UK visitor market (outside London).

Prior to Covid-19 the Visitor Economy generated aa visitor spend of £7.1bn, supporting 133,000 FTE jobs and supply chain revenues of £3.4bn. The Visitor Economy represents 9% of all Gross Value Added (GVA) in the region.

Employment in the South West is heavily dependent on the Visitor Economy, averaging 12% at a regional level but rising to over 60% of all employment that is dependent on the Visitor Economy in rural areas such as Exmoor.

Employment is also significantly seasonal across all areas leading to issues of unemployment in the winter or lack of staff in the summer depending on the structure of the destination and both scenarios are visible across the South West partner destinations.

VISITOR NUMBERS AND SPEND BY AREA



ABOUT THE GREAT SOUTH WEST TOURISM PARTNERSHIP

The Great South West Tourism Partnership (GSWTP) is an inclusive, equitable alliance that brings together the strength, knowledge and expertise of the leading DMO and tourism organisations in the Greater South West Area.

During the COVID-19 crisis, the GSWTP group has come together to the benefit of the communities, local businesses, employees and local economies including:

- Providing essential communications, business support, information and guidance to the individual businesses – as well as delivering a 'Be the Business' programme
- Working closely with Local Authorities to enable delivery of business grants and funding support
- Co-ordinating regional marketing campaigns including "Enjoy Summer Safely, Enjoy South West"
- Undertaking collaborative business impact surveys to provide robust data to government, MPs and stakeholders
- Engaging and communicating with local communities to retain profile and support for the sector
- Collaborating requests and joint lobbying to Government for industry support

THE PARTNERSHIP IS KEEN TO WORK TOGETHER MORE STRATEGICALLY TO ENSURE THAT THE REGION TAKES THIS OPPORTUNITY TO REIMAGINE, STRENGTHEN ITS POSITION POST-COVID-19 AND BUILD BACK BETTER.

PRODUCT AUDIT

The quality of product across the GSWTP destinations is excellent with many facilities considered the best in Britain and even globally. The quality of natural attractions, outdoor activity provision and food and drink are the strongest product elements. For the scale of the region, the number of 'attractor' visitor destinations is relatively low and present a development opportunity, particularly when aligned to the South West's strengths and an all-weather year-round attraction.

Table 1. Summary Product Audit:

Resource	Description	Rating in relation to other parts of Britain*
Natural Attractions	Beautiful and varied coastline including the whole of the South West Coast Path. Highlights include Jurassic Coast UNESCO World Heritage Site, UNESCO Geopark, UNESCO Biosphere and first National Marine Park. Hundreds of world class beaches from popular resorts to secluded coves. Many natural harbours including two of the largest in the world (Poole and Falmouth) Two National Parks (Dartmoor and Exmoor) and further protected areas including 10 AONBs.	**1**
Visitor Attractions	Around 70 visitor attractions which regularly receive more than 50,000 visitors a year including wildlife attractions, gardens, castles and other historic sites, stately homes, museums, art galleries and steam railways. Many are regionally important but few bring visitors to the region in their own right – the Eden Project, Tate St. Ives, The Box Plymouth, Cheddar Gorge, Lands End and National Maritime Museum Falmouth being notable exceptions. The National Trust owns a large number of properties in the region.	**2**
Activities	• Walking provision is outstanding including the 630 mile South West Coast Path and several long distance inland routes across the region	**1**
	• Excellent cycling provision both on and off- road including parts of National cycle routes	**2**
	• Excellent facilities for a large range of water sports including surfing and body boarding (north coasts) sailing and kitesurfing (mostly south coast and natural harbours) and SUP, canoeing and kayaking both at coastal and inland locations.	**1**
	• Good conditions for extreme sports such as coasteering and climbing.	**2**
	• Good provision for golf throughout the region.	**2**
	• Sea fishing and cold water diving	**2**
	• Unique experiences such as National Park safaris, foraging, engaging with wildlife - Dark Sky Reserve status of Exmoor National Park.	**1**
Events	Extensive programme of events and festivals across the region that provide added value, themed around arts, literature, music, food and drink, transport, sports and historical events.	**2**
	Few key attractor events (e.g. Glastonbury, Bournemouth Air Festival, the Plymouth British Fireworks Champi-onships, Sail GB)	**1**
Cultural, Sports, Conference and Arts Facilities	Large performance entertainment venues in all major conurbations/cities and two of the top UK regional theatres Theatre Royal, Plymouth and Exeter Northcott.	**2**
	Sporting facilities include 2 racecourses, County Cricket ground, major rugby stadium and football grounds.	**2**
	Significant conference facilities in Bournemouth and Torquay; new investment in Exeter and Plymouth will strengthen the offer	**1**
	iMax Plymouth - largest cinema in the south west	**2**
Retail Offer	Major shopping centres in all main towns and cities mostly focussing on high street names with some inde-pendent stores. More varied retail offer in market towns throughout the region. Farmers markets and farm shops are a strong feature throughout the region.	**3**
	Local crafts and local produce and their associated retail outlets are strong distinctive regional product	**1**
	Key attractor: Clarkes Village – wider regional audience.	**1**
Food and Drink	High quality restaurants, some linked to celebrity chefs, are found across the region especially focussing on seafood. An excellent standard of restaurants, cafes and pubs are a feature in all counties. This region is famous for Seafood, Cornish pasties, cream teas and cheeses but also for its production of quality beer, cider, wine, gin, rum, ice cream and meats. Exceptional quality of local food and drink producers ensure south west is a known foodie destination. The sector supports local producers and fishermen across the region with significant impacts.	**1**

***Rating system** = 1: High quality resource and a key reason visitors come to the area; 2: Significant attraction but not usually a key reason for visiting (apart from a few specialists); 3: Significant supporting resource – important for visitors once arrived; 4: Regionally important resource but not an attractor for visitors outside the area*

The retail offer is potentially the weakest part of the product, but it is in line with other parts of the UK and not a key reason for visits to the region or significant growth market and so this is not detrimental to the overall South West offer, which is well above average. The local crafts and produce retail offer is strong and regionally distinctive and should be strengthened if pulled together into a visitor experience trail or simply included more prominently in visitor communications.

A review of the accommodation provision shows that the quality of accommodation across the region is excellent with 82% of accommodation rated by customers as 4 star plus (Trip Advisor rating) and just 8.2% rated less than 2 star. The more traditional seaside resorts, where there is still a higher number of B&Bs and more traditional accommodation, are the areas where customers rated the quality lower but still significantly better than other seaside resorts nationally. The proportion of serviced accommodation remains high across all areas so there is development potential for greater non-serviced accommodation in addition to the many new developments already planned and in progress across the region.

Accommodation across GSWTP destinations and Trip Advisor customer ratings:

Total no of accommodation businesses listed on Trip Advisor	**7,618**
% rated 5*	**41.7%**
% rated 4* up to 5*	**40.8%**
% rated 3* up to 4*	**7.9%**
% rated 2* up to 3*	**1.4%**
% rated <2* or unrated	**8.2%**
% Serviced accommodation (Hotels/B&Bs)	**70.4%**

COMPETITOR REVIEW

The South West most significant markets are the UK domestic overnight market and international visits from Germany, USA, Netherlands and more generally near Europe and long-haul English speaking. For the domestic and inbound markets the primary competitor destinations are other parts of the UK, therefore for this report the destinations across the South West were reviewed against key UK competitor destinations including: South East, East Anglia, Yorkshire, Lake District (NW), Wales and Scotland.

The competitor review considered the structure of the destination in terms of volume and value as well as reviewing it across key variables such as scenery, coastline, outdoor activity resources, family friendly, cultural facilities, year-round offer, travel connectivity, accessibility, accommodation, food and drink and business events infrastructure. Where possible this review considered consumer feedback and research, but it should be noted that even where consumer data was used this is still a subjective assessment. The review considered the regions competitiveness for attracting domestic and international visitors.

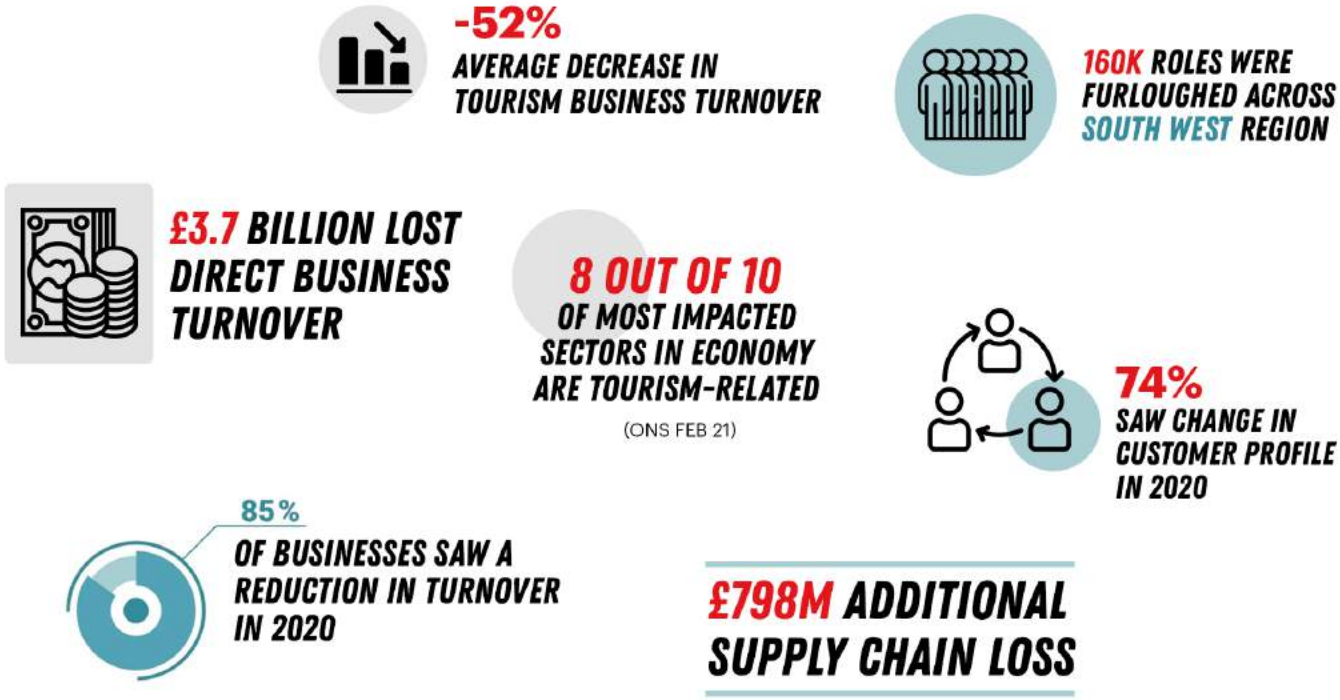
THE KEY FINDINGS OF THE COMPETITOR REVIEW IDENTIFIED THAT:

- The South West Region's destinations have a very strong, competitive offer for scenery, coastline, water sports and outdoor activities as well as food and drink but the South West is missing the clear regional level marketing proposition / marketing activity to raise awareness among new audiences, particularly focussed on the South West as a winter destination, and working together would coalesce the reputation and strength of the individual 'brands' across the South West.
- The South West's product is more seasonal than competitor destinations
- Although the volume of international visitors is low to the South West, the value achieved per international visitor is high relative to competitors. There is significant growth potential that can be leveraged by further strengthening the regional offer with a clear proposition for international visitors in key target markets, particularly focussed on influencing visitors that have chosen a visit to the UK but not yet finalised their itinerary or are loyal / regular UK visitors.
- The day visitor to the South West is spending significantly less than competitor destinations
- There is significant opportunity to grow Business Events across the South West but the partnership must recognise the changing trends in this market post-pandemic

Key opportunities are building the year-round offer to address seasonality and developing a marketing proposition for the region, which builds on the strength of the individual brands and is tailored to different target markets with clear and distinctive propositions for each target international market, domestic growth markets and business events. There are further opportunities focused on increasing the value of day visits or converting them to overnight visits and thus generating a greater return for each visitor

The full competitor review matrix can be found in appendix B.

IMPACT OF COVID-19



The Great South West Tourism Partnership has undertaken business impact surveys since the start of the Covid-19 outbreak to measure the impact of Covid-19 across the tourism sector. The survey showed that to date:

- THE AVERAGE CHANGE IN BUSINESS TURNOVER FOR 2020 WAS -52%
- CONSEQUENTLY, IT IS ESTIMATED THAT APPROXIMATELY £3.7 BILLION OF ANTICIPATED TOURISM BUSINESS TURNOVER WAS LOST IN THE GREAT SOUTH WEST REGION
- IF THE SUPPLY CHAIN IS ALSO CONSIDERED, IT IS ESTIMATED THERE WAS A FURTHER LOSS OF £798M TO THE GSW ECONOMY
- CONSIDERING THE FULL YEAR, 85% OF BUSINESSES SAW A REDUCTION IN TURNOVER IN 2020, WITH 46% OF ALL BUSINESSES SEEING TURNOVER DECREASE BY MORE THAN 50%
- 29% OF BUSINESSES ARE UNSURE HOW LONG THEIR BUSINESS CAN SURVIVE
- THE MAJORITY OF BUSINESSES ARE OPERATING AT LESS THAN 75% OF THEIR CAPACITY IN ORDER TO IMPLEMENT SOCIAL DISTANCING MEASURES
- 74% OF BUSINESSES SAW A CHANGE IN THEIR CUSTOMER PROFILE IN 2020, WITH 45% RECORDING AN INCREASE IN FIRST TIME VISITORS

(Source: South West Research Company survey of over 1,businesses in Sept 2020)

In February 2021, the Office for National Statistics (ONS) produced a report highlighting that 8 of the 10 most affected sectors of the economy are tourism-related.

The Great South West Tourism Partnership are still to understand the full and ongoing impact of the Covid-19 pandemic and expect the impacts to continue into 2022.

PRODUCT MARKET ANALYSIS

TAKING INTO CONSIDERATION THE OVERALL POSITION OF THE SOUTH WEST AND FUTURE OPPORTUNITIES, THE SOUTH WEST DESTINATIONS INCLUDE A SIGNIFICANT CONCENTRATION OF WORLD-CLASS NATURAL ASSETS AS WELL AS FOUR VIBRANT REGIONAL CITIES; AN EXCEPTIONAL FOOD AND DRINK OFFER; A GREAT MIX OF QUALITY ACCOMMODATION, ATTRACTIONS AND BUSINESS EVENTS VENUES – PROVIDING A VERY STRONG BASE PRODUCT ON WHICH TO SEIZE THE GROWTH MARKET OPPORTUNITIES.

The most significant challenge is the high level of seasonality across the region, but this can be addressed with a coordinated and focused effort over time. Working collaboratively to leverage and coalesce the value and strength of the individual brands across the region could have significant benefits.

Summary of the key strengths, challenges and opportunities in terms of product-market fit:

Strengths	Opportunities
• Significant concentration of world-class natural assets (2 UNESCO World Heritage Sites, UNESCO Biosphere, UNESCO Geopark, 2 National Parks, 10 AONBs, 630 miles of stunning coastline, the UK's first national marine park) • A significant number of the top "brands" in UK tourism • Four vibrant regional cities • Exceptional food and drink offer including outstanding local producers; • Great mix of accommodation, attractions and business events venues • 67% micro and 29.5% small businesses – diverse sector	• Outdoor and natural spaces more popular post Covid-19 • South West consistently top destination on VisitEngland Covid Consumer Tracker (no. 1 on 25 out of 26 waves) • Support businesses and protect consumers through a compulsory registration scheme • Large number of independent businesses create unique "local" product offer • Product aligned to key consumer growth segments: - Accessible tourism - Sustainable tourism - Experiential tourism - Activity and adventure - Wellbeing - Culture
Challenges	
• Seasonality - 48% of spend occurs in Jun, Jul & Aug • Lack of access to forward booking, consumer and trend data • Unregulated hospitality provision • Connectivity within the region and especially rural areas • Up to 60% of employment in rural areas • Covid-19 significantly impacted the sector	

TOWARDS 2030 BUILDING BACK BETTER AND LONGER-TERM GROWTH

THIS SECTION OF THE REPORT WILL COVER THE AMBITIOUS APPROACH TO REDEFINING THE VISITOR ECONOMY IN THE AFTER-MATH OF COVID-19, ENSURING THE VISITOR ECONOMY DOESN'T SIMPLY RETURN TO THE STATUS QUO BUT TAKES THIS OPPORTUNITY TO BUILD BACK BETTER, ALIGNED TO THE LONG-TERM PRIORITIES ACROSS THE GREAT SOUTH WEST TOURISM PARTNERSHIP DESTINATIONS. THE PLAN PARTICULARLY FOCUSSES ON AREAS WHERE THERE IS GREATER STRENGTH WORKING TOGETHER AT A REGIONAL LEVEL.

INTRODUCTION TO OPPORTUNITIES AND ASPIRATIONS OF GSWTP

The Great South West Tourism Partnership has identified key areas of development where there is a common objective to Build Back Better and reimagine the Visitor Economy across all partner destinations. These are divided into priority themes – Zero Carbon, Accessibility and Improving Productivity – with a particular emphasis on addressing the high level of seasonality across the region. There are also four supporting themes which all contribute to the priority areas. The themes are:

PRIORITY THEMES

Zero Carbon - deliver clean and inclusive growth to make it easier for visitors to make sustainable choices

Accessible and Inclusive - to be the most accessible destination in the UK

Improving Productivity - addressing seasonality; value per visitor; data and research and collaboration

SUPPORTING THEMES

Building Resilience - strengthen business networks; support businesses and protect consumers through a compulsory registration scheme, build community wealth and strengthen the supply chain

Skills and Employment - Kick start recovery by getting people back into employment; support growth businesses; improve digital skills and provide career paths

Marketing and Communications - promote the region to new and growth markets as a place for business events

Improve Connectivity - encourage and support digital and transport infrastructure improvements

These priorities align to the aspirations of the Government's Build Back Better agenda with a focus on green growth, creating a global leading sector and world-class product offer. The GSWTP will use innovative approaches to address seasonality, build resilience and reach new audiences, as well increasing opportunities for year-round employment and improving skills, which will help level up the region.

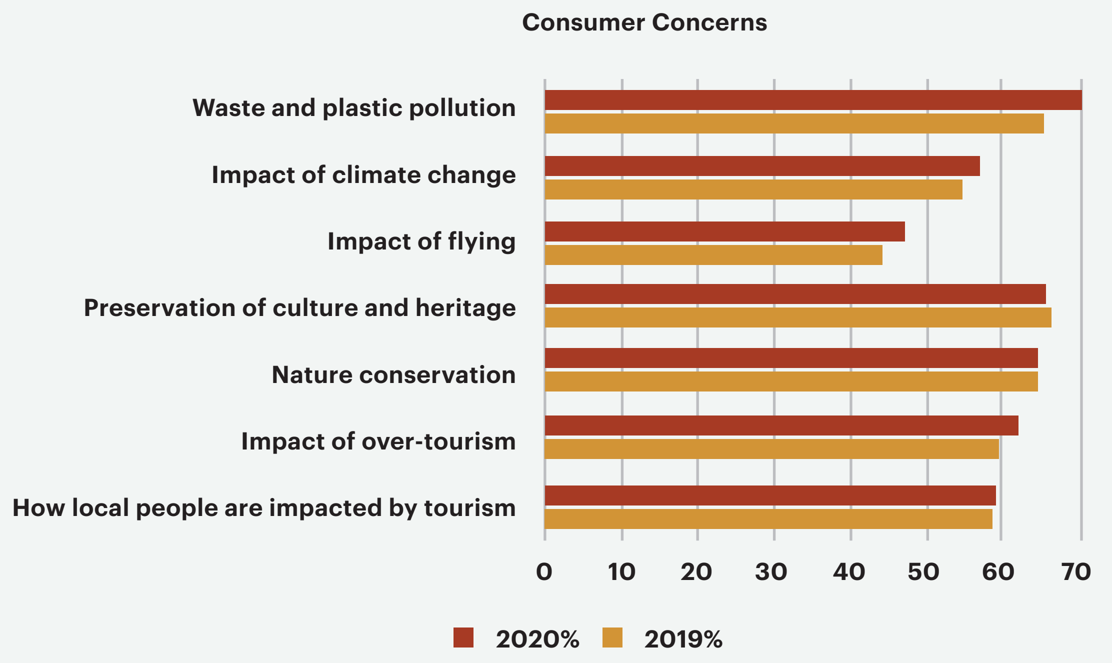
The next section of the report will explore the GSWTP themes in more detail and importantly projects that will address these issues at a regional level.

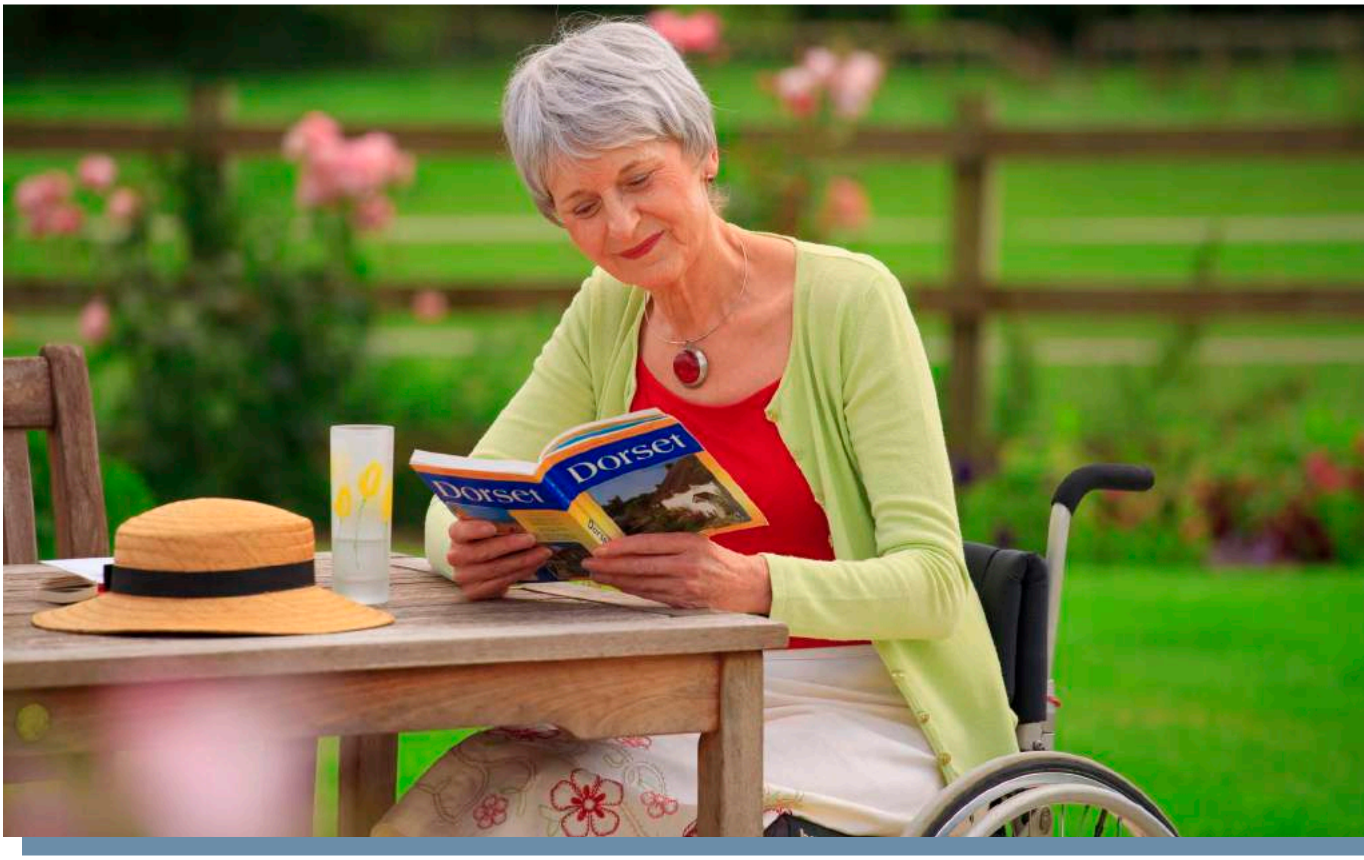
ZERO CARBON

A recent ABTA report suggests that the global tourism industry accounts for 8% of greenhouse gases and that there has been a gradual increase in the consumer's concern for the environment. It noted that 38% of people in 2020 said they were more likely to choose one company over another based on a better environmental record and those agreeing that travel companies should ensure that their holidays help the local people and economy has risen to almost two-thirds (62%).

Consumer Insight Consultancy BVA BDRC's annual survey of holiday trends support this, showing that 80% would actively help to deliver sustainability standards at a destination and 61% would pay an additional fee to ensure sustainable tourism standards are met. Further, Euromonitor identify that 76% of consumers are more concerned about the environment since the Covid-19 pandemic.

Table 2. shows the increasing level of consumer interest in key sustainability issues





DELIVERING CHANGE

Changing energy supplier, waste management system or food suppliers will not always save money but the rewards are clear in terms of increased customer loyalty with Green Businesses stating that they find customers are more loyal, much more likely to recommend the business to their friends, and more likely to repeat their visit in the future.

The South West of England has traditionally been a leader in the development of Sustainable Tourism with its Sustainability South West programme in 2016 and the Discover Devon Naturally Project in 2006. Historically it has had a relatively high number of businesses belonging to the Green Tourism Business Scheme but this has recently reduced, which is thought to be due to failings in the scheme rather than lack of interest in sustainability. Understanding this further will be key to engaging businesses again.

DESTINATION BEST PRACTICE

Although there are many examples of individual tourism businesses which have seen significant benefits as a result of 'greening', it is harder to find examples of where a whole region has worked together to address these issues collectively. Some countries including Costa Rice, Botswana, Bhutan and Dominica have strong sustainable policies in relation to tourism and they form part of their brand values, marketing offer and reputation.

In Valencia, Spain, an environmental review based on 2019 tourism numbers was carried out to form the basis of their Sustainable Tourism Strategy 2030. The Study monitored carbon emissions stemming from tourist activity in ten areas of the city and found that the vast majority of a tourist's carbon footprint (81%) resulted from travel to the city.

Visit Valencia Foundation with WTO and Habitat III (UN conference on sustainable urban development) has enacted a master plan to become a carbon neutral destination by 2025. Already Valencia has efficient waste and water consumption systems along with green spaces and bicycle first streets. The new plan will address transportation to and around the city, including electrifying the public transit system and increasing renewable energy production across sectors which engage in tourism.

BUSINESS CASE STUDY: HIGHER WISCOMBE,EAST DEVON

There are many businesses across the South West already leading the way in terms of improving their environmental impact.

Higher Wiscombe, multi-award winning business, has demonstrated significant gains in energy reduction, water consumption and waste following an extensive investment programme.

HOW TO IMPROVE SUSTAINABILITY: BUSINESSES

Businesses can focus on reducing the carbon footprint of their business either in their own way following expert advice or by joining one of the Green Accreditation Schemes such as Green Key or the Green Tourism Business Scheme or Planet Mark. The accreditation schemes help businesses to operate in a more sustainable way by:

- Reducing energy use and/or switching to greener energy supply
- Saving water
- Efficient and eco-friendly waste disposal
- Ethical buying
- Staying local and seasonal
- Minimising food miles
- Promoting biodiversity
- Adopting a smart, sustainable outlook

Other measures a business can take include providing information to visitors on how they can have a greener holiday including arrival by public transport, use of sustainable transport options while in the destination, recommending other green businesses and attractions, making it easy for consumers to recycle and communicating to customers on how to help protect and respect the local environment. Businesses could also communicate to potential customers as to how they are supporting the environment and their green credentials.

HOW TO IMPROVE SUSTAINABILITY: DESTINATIONS

There are a number of actions that destinations can take to improve the sustainability of the Visitor Economy:

- Audit the impact of Visitor Economy carbon emissions in the region and set targets for reduction
- Adopt the European Tourism Indicator System (ETIS), REAP or similar system
- Support businesses in reducing carbon emissions and directing businesses to support schemes
- Organise training and webinars for tourism businesses to raise awareness of the importance of reducing carbon emissions and reducing waste and practical advice on achieving this
- Set up a grant or loan scheme to support tourism businesses in reducing their carbon footprint
- Assess existing green tourism business tools and recommend schemes to businesses
- Work with a green accreditation scheme to encourage wider participation e.g. creating a lower entry option possibly via a simple online self-assessment
- Work with national rail, coach and bus partners to promote the use of public transport to travel to and around the destination(s) as well as encouraging greater synergy across the wider network to make it easier for consumers to switch.
- Work with the local authority and LEP to improve local sustainable transport options including changing provision to low energy emissions fuel, providing E-Bikes, cycle hire, scooters, encouraging investment in cycle routes, electric vehicle charging points which align with visitor and resident needs.
- Ensure that communication about local transport options is easily accessible for all visitors – including before they reach the destination and at sub-regional level to make it easier for consumers to switch from car travel
- Develop a suite of carbon neutral itineraries to help visitors make smarter choices when travelling to/ around the destination and accessing the surrounding area
- An audit of all local suppliers relevant to the tourism industry. Actively promote use of local suppliers by tourism businesses to reduce supply chain carbon footprint.
- Organise Exhibitions/exchanges to bring tourism businesses together with potential suppliers
- Conduct an audit of current waste management by tourism businesses
- Produce sustainable messaging which can be adopted by DMOs/businesses promoting the region

Recommended actions for GSWTP:

P1: A SUSTAINABLE VISITOR ECONOMY

Objective: Understand the current environmental impact of the Visitor Economy and make it easier for visitors to make more sustainable choices. Undertake an audit of the Visitor Economy carbon footprint to ascertain key areas for improvement

Map existing schemes, public transport, electric car charging points, cycle/scooter hire across the region and upload information on www.visitsouthwest.co.uk to make it easy for consumers to find information about travelling sustainably. Target 50k unique visits of the sustainable travel page by end of 2022.

Create at least 5 sample itineraries that make it easy for visitors to see how they can make more sustainable choices and still explore the destination fully

Work collectively with transport providers over the next 12 months to influence changes to the timetables and joined up ticketing fares that work for visitors and make it easier to switch modes

Identify gaps in provision and encourage investment

Encourage businesses to install electric car charging points and greater use of electric vehicles by visitors, including incorporating within imagery and promotional videos

Outcomes and Key Performance Indicators:

- Audit of Visitor Economy carbon footprint and increased understanding of visitor behaviour
- New page on visitsouthwest.co.uk with sustainable travel information and 5 sustainable travel itineraries – viewed by 50k unique visitors by end of 2022 and linked to from each of the partner DMO websites to ensure one key source which to be updated
- Improvements to the public transport timetable and sustainable transport infrastructure

Activity	Cost
Project Management (1 FTE for 12 months thereafter 0.4FTE)	**£57,400**
P1.1. Audit of visitor economy: Measurement of Carbon Footprint (6-9 months)	**£110,000**
Appoint a specialist to undertake measurement of carbon footprint of tourism	**£50,000**
Analyse work previously carried out on measurement of the Carbon footprint, utilising data from Local Authorities and previously funded activity in South West	
Review existing visitor data sources - volume and value, visitor surveys, GTBS, business survey and other research to understand the current transport use by visitors, both to and within the destination	**£20,000**
Optional: Additional consumer research study to understand visitor behaviour	**+£40,000**
Review study and targets for each destination and type of activity/sector - accommodation, transport, food and drink, waste etc. as well as targets to increase visitor use of more sustainable transport	
P1.2 Map existing provision and make available to visitors (3-6 months)	**£305,000**
Map existing sustainable transport options within the region - including bus, train, cycle lanes/hire, electric scooters and E bikes, ferries working with local authorities to avoid duplication.	**£20,000**
Create sustainable travel itineraries that make it easy for visitors to see how they can explore the region more sustainably	**£10,000**
Develop a page on www.visitsouthwest.co.uk to host sustainable travel itineraries and other visitor information, pages to be linked to from partner DMOs to ensure information only needs to be updated once for the whole region	**£25,000**
Encourage partner DMOs to link to regional info and incorporate within existing marketing activity	
Encourage accommodation businesses to promote the use of sustainable transport and utilise information provided	
Marketing campaigns (in partnership with transport providers) to encourage sustainable breaks to the South West	**£250,000 (incl. match)**
P1.3 Lobby for improvements in provision (ongoing)	
Identify gaps in provision in terms of timings, location and accessibility	
Identify key areas of improvement and focus that provide quick wins and / or significant gains towards a net zero industry	
Work with Local Authorities, coach, bus and train providers to fill gaps in provision, encourage alignment of timetables and joint-ticketing fare schemes	
Work with local authorities and LEPs to encourage investment in sustainable transport schemes (eBikes, Cycle hire, EV Charging points) aligned to visitor needs	
TOTAL for P1	**£472,400**

P2: BUSINESS SUPPORT – SUSTAINABILITY	
Objective: Supporting business to make positive change towards net zero, learning from best practice in the sector Increase the number of businesses with a green accreditation by 33% by end of December 2022 (specific target number to be set once audit complete)	
Outcomes and Key Performance Indicators: • 8 Tourism Business Ambassadors recruited to share best practice on improving sustainability • Review of green accreditation schemes having engaged with at least 30 businesses • Increase the number of accredited businesses by 33% by end of December 2022 • Identify 150 businesses actively working towards reducing carbon footprint by December 22 • Engage 100 businesses in webinar and workshops focused on reducing sustainability by end of December 2021 • Creation of Evergreen investment loan scheme	
Activity	**Cost**
Project Management (0.6FTE) for 18 months	**£36,900**
Identify and recruit at least 8 tourism businesses to use as Ambassadors by the end of 2021. Develop a series of case studies, networking events and Ambassador Q&A sessions to mentor and support businesses and share lessons learnt	**£15,000**
Undertake detailed analysis of existing green accreditation schemes/benchmark systems (GTBS, Green Key, REAP, Planet Mark)	**£20,000**
In-depth qualitative consultation with 30 existing green (and previously accredited) businesses to understand benefits of accreditation and barriers to ongoing engagement	**£10,000**
Potentially work with an existing scheme to adapt the scheme to make it easier for businesses to start their journey and stay accredited	**£30,000**
Review and map existing funding and support schemes that businesses can access	
Increase number of accredited businesses by 33% by end of December 2022 and identify 150 businesses actively working towards a reduction in their carbon footprint	**£30,000**
Create a series of webinars, workshops and business support 'hubs' which make it easy for businesses to identify support and deliver change. Engage 100 businesses before end of December 2021	**£30,000**
Encourage the creation of an "Evergreen" investment loan scheme* to provide low cost-performance related investment scheme for businesses	
Total for P2 programme for 12 months	**£171,900**

ACCESSIBLE AND INCLUSIVE

Accessible tourism is growing worldwide, driven by changing consumer demographics with an estimated one fifth of the world having accessibility needs. Shifting consumer attitudes, regulations and the tools available are leading to a global trend to deliver easy travel experiences for all.

Estimates of the size of the accessible market in the UK vary depending on exactly how you define and measure disability. The Great British Staycation report produced by Barclays in 2018 noted that 28% of consumers in Britain have a long-term disability or condition which affects their holiday choices and a further 22% have a family member with such a condition.

28% OF CONSUMERS IN BRITAIN HAVE A LONG-TERM DISABILITY OR CONDITION WHICH AFFECTS THEIR HOLIDAY CHOICES

	Inbound trips	Domestic overnight	Day Trips
Value of Accessible tourism market	£0.5bn	£3.2bn	£11.6bn
Contribution to England tourism volume	2%	15%	20%

The average length of stay and spend of a visitor with an access need is higher than those without an access need, with the average length of stay being 3.3 nights and spend per head £210.

Research commissioned by VisitEngland in 2018 estimated that more than £115.7m of potential tourism spend was being lost due to lack of accessible provision. The research found that 48% of those with an impairment had taken a holiday in the last year and travellers were more likely to take a domestic trip. The main barrier to travel was affordability but 8% cited accessibility issues, this represents a direct loss of 430,000 potential visitors.

Visitors with accessible needs travel year-round and therefore targeting this market provides a significant opportunity to address seasonality and thus improve productivity as well.

THE UK GOVERNMENT HAS SET AN AMBITION FOR THE UK TO BECOME THE MOST ACCESSIBLE DESTINATION IN EUROPE AND TO INCREASE THE NUMBER OF ACCESSIBLE VISITS BY 33%.

SCALE OF THE CHALLENGE

Addressing accessibility is not simple, visitors who are restricted in their ability to travel due to a disability have a large range of different needs. They include not only those who are restricted by their mobility but also impaired sight, hearing, dementia, autism or other long-standing illnesses. Only 9% of those with a disability use a wheelchair. The scale of provision required varies hugely from Changing Places toilets suitable for the most severely disabled adults to simple changes to a website and how consumer information is presented.

Businesses cannot simply tick an accessibility button on a website, they must explain exactly how the facilities will meet different visitor's needs.

For those with disabilities and their carers, the most important thing in planning a visit is to understand what to expect when they go away so they can assess whether a visit is possible and how it will address their needs. Many accessible visitors require only small adaptations or support.

VisitEngland's Accessibility Guides are an excellent tool for businesses to use to explain to visitors how they can help those with an impairment.

TOOLS FOR ACCESSIBILITY IMPROVEMENT

There are three aspects to tackling improvements in accessibility provision:

1. Information for tourism businesses on why and how they can become more accessible, raising awareness of the information provided on the VisitEngland website along with advice on how to create an Accessibility Guide and the National Accessible Scheme
2. Training for staff in disability awareness – training courses and webinars to explain the variety of different needs visitors may have and how facilities and services can offer support. Delivered by the Welcome to Excellence programme and a number of private providers
3. Guidance and potentially financial support to make improvements to facilities

COMMUNICATION

Nationwide, communication of accessible provision to those who need it is in need of significant improvement. For the physically disabled market, where facilities are absolutely essential, there are specialist websites e.g. Disabled Holidays, Accessible Escapes but many of these are not relevant to the wider accessible market.

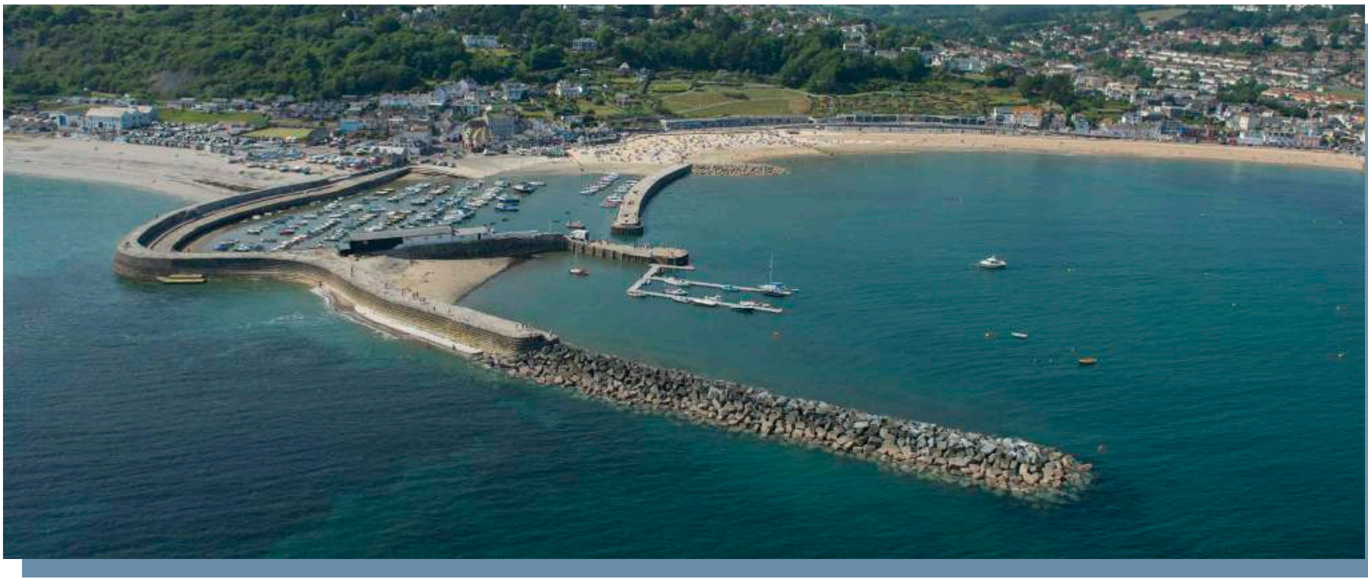
The National Accessibility Scheme (NAS) has a listing of accessible accommodation. Most DMO websites provide some information but it is not usually comprehensive. Booking platforms such as Booking.com and Airbnb have accessibility symbols but rarely detailed information.

BEST PRACTICE: DERBYSHIRE

In Derbyshire a proactive approach has been taken to tackling accessibility issues with a new website called Accessible Derbyshire. The site lists accommodation, activities, attractions and places to eat and drink within Derbyshire and the Peak District that have accessible facilities. A good search facility and symbol system means that users can find places that meet their specific needs, not just general provision.

Welcome to Yorkshire is currently working with Access for All (who were instrumental in setting up Accessible Derbyshire) to upgrade facilities and communication aiming to be the most accessible destination in the UK.

The North York Moors National Park has recently started working with VisitBritain on improving accessibility for International Visitors.



ACTIONS TO IMPROVE ACCESSIBILITY: TOURISM BUSINESSES

- Assess current provision and create an Accessibility guide
- Display the Accessibility guide clearly on the website
- Ensure that all marketing material makes those with an impairment feel welcome
- Ensure the website is accessible for visually impaired
- Join the National Accessible Scheme (NAS) / other accessibility friendly schemes
- Staff training on accessibility issues including dementia, autism, sight and hearing-impaired focussing on the "Welcome for All" programme
- Raise awareness of issues in the local area
- Appoint an Accessibility Champion (for larger businesses)
- Use a specialist consultant to advise on provision improvements
- Make physical changes to premises to improve access

ACTIONS TO IMPROVE ACCESSIBILITY: DMOS

- Audit of existing provision by sector and destination for each accessibility market and set targets for improvement
- Review all support available to businesses and pull into an easy guide to clearly communicate what provision and support is available for businesses and how to get started
- Organise a programme of webinars, conferences and training courses to raise awareness of the importance of addressing accessibility challenges and how to promote change
- Facilitate an introduction to support schemes and providers
- Actively promote uptake of Accessibility Guides or provide funding to enable businesses to complete an audit and create accessibility guide
- Secure the services of an Accessibility consultant to support businesses
- Incorporate visitors with disabilities in marketing materials and communications
- Ensure all DMO and South West communication and websites are accessible for all
- Work with local authorities, LEPs and other bodies to assess current provision, communicate what is available at destination level and make improvements to the public realm within destinations including structural improvements (wayfinding, pavement, toilet provision, car parks, beach access)
- Encourage clusters of businesses to work together to improve provision across destinations to make a holistic holiday experience more achievable
- Provide sample itineraries of experiences that can be enjoyed by visitors with different access needs working in partnership with relevant charities and support groups to ensure the accuracy and feasibility of suggestions

P3: MAKE THE SOUTH WEST THE MOST ACCESSIBLE DESTINATION IN THE UK

Objective: To understand the current accessible provision and increase accessible tourism provision by 33% by end of December 2022 (agreeing specific number of businesses that achieves 33% target once the audit is complete).

Ensure partners lead by example, improving their own accessible communication and information

Work in partnership with charities and specialists to develop 10 accessible itineraries covering visitors with different needs

Outcomes and Key Performance Indicators:

- Audit report detailing current accessible provision and areas for improvement by access need and at each GSWTP destination by end of December 2021
- All DMO sites to be fully accessible by March 2022
- Create online search facility covering different accessibility needs by December 2022
- Develop 10 new itineraries to showcase ways visitors with different accessibility needs can enjoy the South West region by September 2022

Activity	Cost
Project management (0.8FTE) for 18 months	**£49,200**
P3.1 Audit of current provision (6-9 months)	
Appoint a specialist to audit the current provision across the South West	**£50,000**
Agree the criteria for categorising businesses in terms of their provision for visitors with accessibility needs e.g. wheelchair access, dementia friendly, hearing-impaired, sight-impaired etc.	
Audit to review provision of products by different access needs and destinations (e.g. what products across south west are suitable for hearing impaired, as well as what products are available for a range of access needs in Dorset or Torbay)	
Review targets for improvement and pilot / focus areas (by accessibility need and destination)	
P3.2 Communication (3-6 months)	
Review and make improvements to each DMO / partner website to ensure fully accessible (£10,000-£15,000 per DMO)	**£150,000**
Upgrade websites / create a specialist website so that users can search for specific accessibility needs to find and book accommodation, attractions etc. similar to accessible Derbyshire website but covering a wider range of accessible tourism needs and ideally linked to individual DMO website Content Management Systems to enable businesses to enter information once and be visible on multiple sites.	**£75,000**
Once the current provision is understood, start work with charities / specialists to create itineraries for visitors with different access needs so as to highlight areas offering good provision where holidays can be enjoyed	**£20,000**
Host itineraries on www.visitsouthwest.co.uk and link through to DMO and other relevant partners for further information and booking. Increase the use of imagery of consumers with different access needs, including budget for new photography and videos	**£55,000**
P3.3 Lobby for improvement in provision (ongoing)	
Work with local authorities, LEPs and Charities to identify public realm improvements and funding streams to deliver improvements	
TOTAL	**£399,200**

P4: ACCESSIBLE TOURISM - BUSINESS SUPPORT

Objective: Supporting business to understand the accessible market and how they can make a positive change and learn from best practice in the sector

Outcomes and Key Performance Indicators:

- 8 Tourism Business Ambassadors recruited to share best practice on accessibility by September 2021
- Increase the number of businesses with Accessibility Guides by 33% by end of October 2022
- Engage 100 businesses in webinar and workshops focused on improving accessibility by end of December 2021
- Engage 100 employees in "Welcome All" or similar training courses by end of December 2022
- Support 30 businesses with specialist accessibility advice by end of October 2022
- Creation of Evergreen investment loan scheme

Activity	Cost
Project Management (0.6 FTE) for 18 months	**£36,900**
Identify and recruit at least 8 tourism businesses to use as Ambassadors by the end of 2021. Develop a series of case studies, networking events and Ambassador Q&A sessions to mentor and support businesses and share lessons learnt	
Review and map existing funding and support schemes that businesses can access	
Actively promote uptake of Accessibility Guides - possibly with incentive scheme (free places at training, subsidised staff training etc)	**£50,000**
Create a series of webinars, workshops and business support 'hub' which make it easy for businesses to identify support and deliver change (target owner/manager)	**£30,000**
Deliver a programme of training courses covering different aspects of accessibility needs aimed at front-line staff	**£50,000**
Secure a consultant to provide specialist accessibility advice to businesses (subsidised or free)	**£75,000**
Encourage creation of "Evergreen" investment loan scheme to provide low cost-performance related investment scheme for businesses	
TOTAL for P4 workstream for 12 months	**£241,900**

IMPROVING PRODUCTIVITY - ADDRESSING SEASONALITY

PRODUCTIVITY IS USUALLY MEASURED AS THE TOTAL OUTPUT OF A BUSINESS DIVIDED BY THE NUMBER OF EMPLOYEES OR TOTAL HOURS WORKED, WITH GROSS VALUE ADDED (GVA) BEING THE MOST COMMON MEASURE OF OUTPUT. PRODUCTIVITY IN THE UK IS PARTICULARLY LOW (ALONG WITH CONSTRUCTION, RETAIL AND ADMINISTRATIVE SERVICES) IN THE TOURISM INDUSTRY.

THE PRODUCTIVITY CHALLENGE

There is huge variation in demand for tourism products depending on season, day of week, time of day, weather and a number of other factors, as well as differences between visitor markets all of which are not often easy to predict. Major economic or weather events can also have huge consequences on the demand for tourism products. Extending the season to lessen the impact of demand variation is a crucial tool in improving productivity.

Limited broadband and mobile coverage in rural and coastal areas has been a significant barrier to growth over the last 10 years. However, the investment through Project Gigabit announced recently by the UK government, will greatly improve the rural broadband infrastructure in the south west, with Cornwall and Dorset set to benefit first from the investment.

In terms of people and skills, the tourism workforce tends to be transient, temporary and considered low skill. High labour turnover, low staff retention and recruitment issues reduce productivity due to the loss of skilled and experienced workers, and act as a disincentive to training. Post-Brexit many national hospitality businesses have reported it harder and more expensive to recruit staff.

The rapid increase in digitalisation as a result Covid-19 has transformed many aspects of the tourism industry. However, not all businesses have been able to adapt due to limited funds to invest in change, and many lifestyle businesses struggling due to a lack of skills.

A wider analysis of how some of these issues can be addressed is included in the sections on Skills and Employment, Connectivity and Data and Research – all key themes in the recovery of the sector.

HOWEVER, ADDRESSING SEASONALITY IS THE MOST EFFECTIVE WAY TO IMPROVE PRODUCTIVITY OF THE VISITOR ECONOMY IN THE SOUTH WEST, SUPPORTED BY INCREASING THE VALUE PER VISITOR.

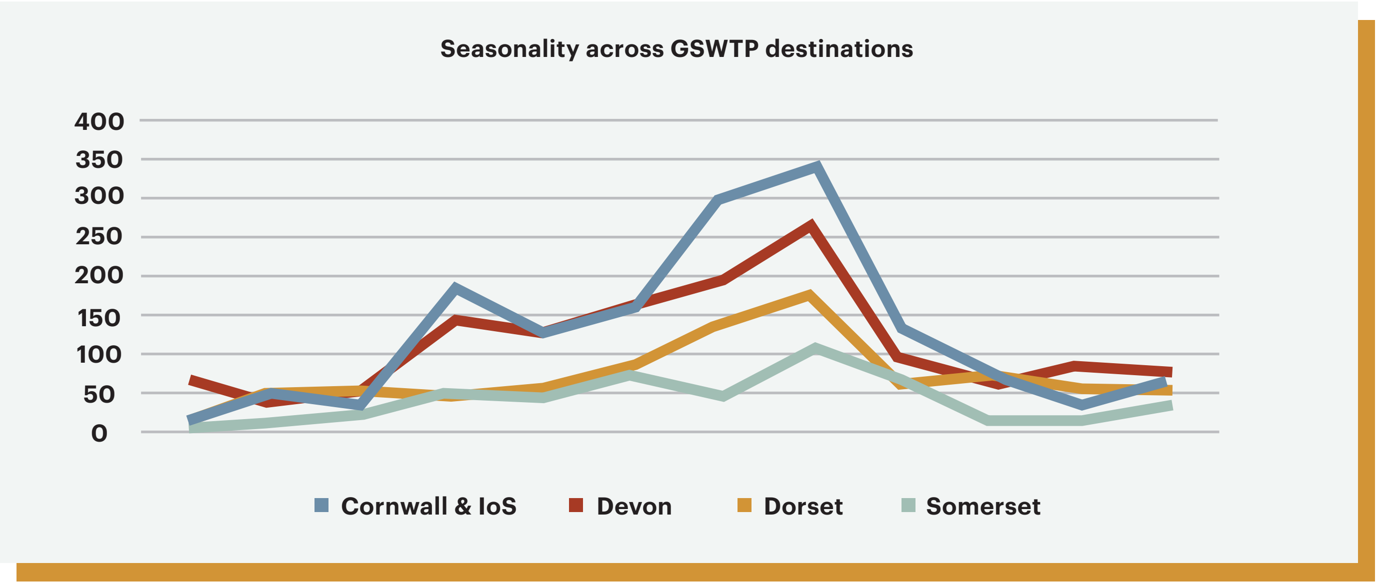
SEASONALITY

CURRENTLY 48% OF THE TOTAL OVERNIGHT VISITOR SPEND IN THE GSWTP DESTINATIONS OCCURS IN JUNE, JULY AND AUGUST.

The chart below shows the seasonality of the Visitor Economy in the South West across each of the partner destinations, and while there are some sub-regional variations, many parts of the South West are considered at maximum capacity during the key summer months, which impacts on the environment and the quality of the visitor experience.

A key challenge to growth is that many smaller businesses close during the winter due to the current VAT threshold rules which make it difficult for businesses to incrementally grow without significant risk.

To extend the season, product development is required. New products must be aligned to visitor markets that are willing and interested in travelling in the off-peak period. Collaborative work is then required to improve facilities and adapt marketing activity to target these new growth segments and challenge existing perceptions of the product.



VALUE PER VISITOR

The average spend per night of a domestic visitor to the SW is £59.07 (£7.92 less than the national average. For overseas visitors it is £60.63 (£37.56 less) and for day visitors it is £34.55 (£6.11 less).

Key techniques to increase value per visitor include persuading day visitors to stay overnight and attracting more higher spending visitors including business visits, overseas visits and those with accessibility needs.

Visitors can be encouraged to stay for longer by promoting the wealth of things to see and do in a destination and encouraging visits to other parts of the region to existing visitors, suggesting two- centre stays and focussing on repeat business. Cross-promotion of other local businesses – attractions, activities and food and drink establishments will also help to keep more money in the area.

PRODUCT DEVELOPMENT

Emerging trends, some of which have become even more relevant as a result of Covid 19, suggest that the following products and markets should be focussed on in the south west region to help extend the season:

ACTIVITY AND ADVENTURE BREAKS

Have been growing in popularity for a number of years. They incorporate everything from walking or cycling, to golf, water sports and a range of extreme sports such as climbing and coasteering. However, whilst 17% of consumers are the enthusiast market, where the holiday is based solely around an activity or adventure, for 48% of consumers in the UK it is an exciting addition to their holiday and there is a huge growth in participation of physical or adventure activities as part of a short break or main holiday. Many of these activities can be participated in all year round and are therefore ideal for extending the season. Some, for example stand-up paddle boarding and kayaking, have grown dramatically in popularity during the Pandemic.

EXPERIENTIAL TOURISM

Another growing trend. Published since the COVID 19 crisis began, Euromonitor International Megatrends report concludes that consumers are prioritising experiences over things, keen to engage more, and have enhanced, more emotional experiences while on holiday. Examples of experiences relevant to the South West could include learning new skills, volunteering, foraging, fossil hunting, photography, nature and wildlife encounters, cookery, craft and hobbies, dark skies.

WELLNESS TOURISM

Health and wellness have become extremely popular in recent years and is increasingly becoming a focus for dedicated wellness holidays such as yoga retreats, mindfulness, forest bathing and a wide range of products beyond spa breaks. Research shows that 1 in 5 British adults now go on a Wellness break each year. Although the interest in spa breaks reduced during the Covid-19 crisis the interest in pursuing a healthy lifestyle grew – for example wild swimming which seems to have recognisable health benefits has seen exponential growth in 2020.

CULTURAL TOURISM

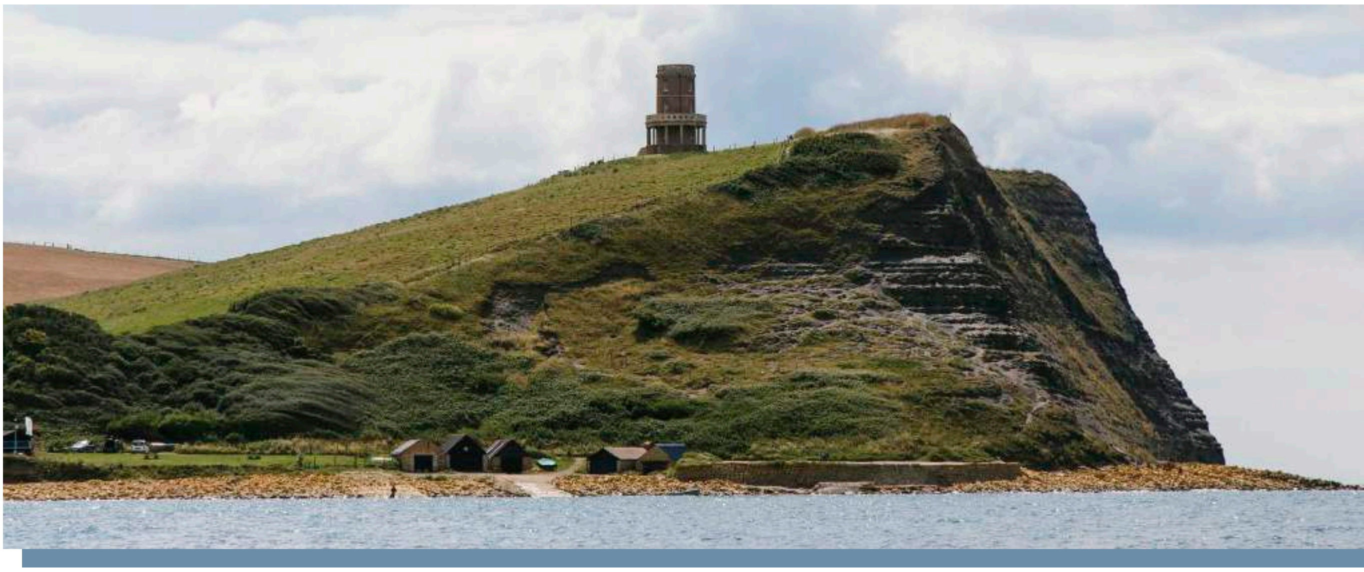
The South West has a wealth of cultural attractions and activities many of which are open all year round. Many of the cities and larger towns are ideally placed for an off-season cultural break with a range of museums, visitor attractions, galleries, theatres and retail opportunities.

BUSINESS EVENTS

Are far less seasonal that leisure visits with even travel across each quarter of the year. Although this is a significant market for the larger urban centres of Bournemouth and Poole, Exeter, Torbay and Plymouth, Meeting, Incentive, Conference and Events (MICE) activity vary in size and scale enormously and present a significant opportunity for the wider GSWTP region as well. Spending an average of £167 per night (versus a leisure spend of £83 per night) this market will also help increase the value per visitor achieved. There are likely to be changes to the nature of this market as a result of Covid-19 but early indications suggest an increase in mixed business and leisure visits which is ideally suited to the South West product offer.

COLLABORATION

Although individual businesses can achieve some extension of the season on their own, to be more effective, businesses need to work together with DMOs to learn how to develop their product and marketing and link into destination level marketing campaigns.



HOW CAN BUSINESSES ADDRESS SEASONALITY:

- Identify year-round activities that are most relevant to their business and location and invest in product development that provides new products in the winter and off-peak.
- Focus on key markets that are more likely to stay longer and spend more e.g. influencing overseas visitors already coming to the UK to visit their business, targeting business visitors and those with accessibility needs who usually spend more per head (either due to the nature of their activity or because they stay longer)
- Encourage repeat visits at different times of year – a simple tool could be to show guests what their business looks like year-round (for example views of the garden for each month of the year), offer discounts for repeat visits at different times of year or value add-ons, target new trends post-covid such as workcations.
- Collaborate with local attractions and food and drink businesses so that there is a more rounded visitor offer in the shoulder and off-peak period to provide experiential and immersive breaks
- Use imagery on communications to promote the benefits of each season and highlight events and activities available off-peak

HOW DMOS CAN HELP ADDRESS SEASONALITY:

- Organise events or themed weeks out of season which are longer than one day, so visitors have to stay overnight
- Use marketing tools to persuade visitors they need to stay overnight – a day visit is not long enough to see everything
- Development of business events and meetings activity aligned to post-Covid trends
- Product development programme supporting businesses and linked to thematic marketing campaigns
- Research to identify key growth segments and understand visitor perceptions to ensure products and marketing reach 'open' audiences
- Build a calendar of events for the year showing what is happening across the region and share with businesses so they can use it as part of their marketing. Include specific events but also suggested activities that could be undertaken – e.g. walking, watersports, food and drink, creative and wellness breaks
- Use hero product to attract new visitors, but then highlight the wealth of other attractions and nearby / regional attractions to encourage longer breaks
- Work with similar regional destinations to develop a reciprocal "you liked X, try Y" campaign for more audacious markets who like to try new destinations but could be convinced to visit another GSWTP destination
- Use imagery and video that show the destination year-round as a vibrant and attractive holiday destination
- Encourage investment into new year-round all-weather attractions
- Facilitate coordination and networking of businesses trying to extend the season or target new markets to have a joined-up approach and share best practice

P5: REDUCE SEASONALITY OF THE CURRENT VISITOR ECONOMY - PRODUCT DEVELOPMENT

Objective: Create new products and experiences and market existing opportunities to present a year-round visitor offer

- Support businesses to understand market opportunities
- Provide expert guidance to develop the product
- Focus on year-round markets
- Align to regional marketing campaigns

Outcomes and Key Performance Indicators:

- 8 Tourism Business Ambassadors recruited to share best practice on product development by September 2021
- Deliver at least 10 workshops / webinars on product development engaging at least 100 businesses across the programme by end of December 2021
- Toolkit produced for each growth market with step by step guide to creating new products by end of September 2021
- Support at least 40 businesses with specialist support to create at least 25 new bookable products by the end of December 2021 and another 40 businesses and 25 products by end of October 2022
- Calendar of year-round events created and shared with at least 500 businesses by end of October 2021, uploaded to visitsouthwest.co.uk website and viewed by 50k unique visitors, linked to from DMO partner websites but held centrally so only updated once
- 5 new off-season events created by end of December 2022

Activity	Cost
Project Management (1.0 FTE) for 18 months	**£61,500**
P5.1 Product – market fit detailed assessment	**£100,000**
Based on growth markets relevant to the South West identify key target areas for development, likely to focus around:	
Activity and Adventure (Outdoor)	
Experiential Tourism	
Wellbeing	
Cultural tourism	
Business Events	
For each product identified:	
Clearly define existing product and suitable development locations	
What market requirements and developments are needed	
Identify target business types for development and facilitate collaboration	
P5.2 Product Development business support programme	**£212,500**
Identify and recruit at least 8 tourism businesses to use as Ambassadors by the end of 2021. Develop a series of case studies, networking events and Ambassador Q&A sessions to mentor and support businesses and share lessons learnt	
Deliver programme of webinars, training and networking sessions on each theme (£10,000 per theme)	**£50,000**
Produce toolkit for businesses on targeting new audiences and how to adapt their product and marketing to attract those visitors x 5 markets	**£12,500**
Secure specialist advice for businesses covering different markets (business events, activities, wellness, culture etc)	**£150,000**
Encourage creation of “Evergreen” investment loan scheme to provide low cost-performance related investment scheme for businesses	
P5.3 Communication	**£80,000***
Focus communication on promoting new experiences in winter (e.g. November to March) – *costs included in marketing and communications programme P10	
Prepare a calendar of events for the year (focussed particularly on November to March) to share with consumers and businesses	**£15,000**
Increase use of imagery showing new products and year-round destination offer Optional: budget for new photography and videos	**£50,000**
Identify ‘matching’ or ‘similar’ destinations within the South West destination partners who could be used for cross-promotional activity	**£15,000**
P5.4 Year-round destination offer	
Encourage local organisers to run events out of main holiday period Optional: provide seed funding for new events and supporting marketing activity	**£150,000**
Total P5	**£604,000**

IMPROVING PRODUCTIVITY - DATA AND INSIGHT

The availability of relevant timely data is crucial to good decision making and to measure and evaluate investment. Having the right information is key to improving productivity and should be a key component in supporting the sector to Build Back Better.

Supporting businesses to access better data and providing simple guidance on how to interpret and use data available to them, could make a significant difference to productivity. Understanding current trends and what existing and potential visitors think about the product is essential for successful product development and marketing.

CHALLENGES

The Visitor Economy in the South West involves a large number of micro and small businesses which provide individual components of the visitor experience, with many self-employed and lifestyle businesses operating below the VAT threshold. It is therefore hard to understand the true scale and impact of the sector as well as access data and insight to support wider destination level decision-making. Data that is produced often reflects historical performance and takes many months to be published.

It is useful to compare statistics between destinations but to do this data needs to be standardised. In the South West most destinations use the Cambridge Method to analyse the economic impact of the Visitor Economy and the National Parks use STEAM making comparison challenging. However, there is still a large amount of data that the GSWTP could analyse and interpret that could significantly improve the understanding of performance and the market.

DATA AND RESEARCH REQUIRED

To support more informed decision-making, the following types of research would be valuable:

- Volume and Value of visitors (as currently produced)
- Market intelligence about growth markets including trends, habits, needs and expectations
- Consumer insights e.g. annual trends, Covid 19 tracker, buying behaviour, growth markets
- Perceptions of the destination among potential visitors
- Satisfaction and feedback from existing or past visitors
- Visitor Surveys in situ to have a much better understanding of current market and performance
- Regular business surveys to gauge performance, occupancy, rev par and future bookings
- In-depth research on how to develop the product to meet potential visitors needs
- Detailed audit of current state of the industry – including accommodation demand study
- Real time analysis of the industry – booking data, satisfaction, future booking trends

BEST PRACTICE: PREMIER COTTAGES

For tourism businesses, availability of relevant up to date statistics on business performance in comparison to competitors is a valuable business tool to understand your own performance and where to focus efforts. Premier Cottages in Devon is trialling a system which enables businesses to see and compare bookings on a regular basis and year.

LEARNING FROM OTHER SECTORS

Over the last 5-10 years there has been significant change in the way that consumers use and interpret information to guide decision-making and purchase goods. Destination Management Organisations need to understand more about consumer behaviour and the buying process, learning from disruptive technology-led organisations to pilot new ways to engage with and influence visitors, as well as learning from sectors that are advanced in using data to improve performance, such as the online retail sector. As the GSWTP, the partner destinations can experiment with new methods of communication with minimal risk until they identify new routes to market that prove effective, at which time they can then upscale learning to regional level and make significant advances.

IMPROVING DATA: STEPS BUSINESSES CAN TAKE

- Share their own data on performance, rates, satisfaction
- Support regular business survey requests
- Carry out their own research with visitors to understand origins, booking behaviour, interests, needs, satisfaction, perceptions and share results

IMPROVING DATA: STEPS DMOS CAN TAKE

- Analyse existing data streams – volume and value, website users, social media followers, national stats and research reports, industry trends and insights
- Provide short actionable summaries for businesses
- Share data within the partnership to understand the wider regional picture and the overlap between existing, potential and past customers
- Collate and interpret business data from a representative sub-set of the Visitor Economy and share in timely and easily actionable format
- Invest in programme of research to include:
  - Visitor surveys
  - Business surveys
  - Consumer research
- Support businesses to interpret and mine their own data
- Work in partnership with other sectors to analyse and interpret booking and spend data
- Engage with TXGB as distributor and share forward booking data across partner areas

P6: DATA-LED DECISION-MAKING	
Objective: Build a comprehensive data and research programme to support business and improve productivity	
Outcomes and Key Performance Indicators: • Quarterly insight reports produced from June 2021 onwards and shared within GSWTP • Distilled version of insight report with key trends produced for businesses and shared quarterly within two weeks of full report being received • 80 businesses recruited to complete Business Barometer and first wave completed by end of October 2021 • Annual business survey completed by at least 384 businesses – first survey completed December 2021 • 150 businesses attending workshops, webinars or other training on using data and new trends by March 2022	
Activity	**Cost**
Project Management (0.6 FTE) for 18 months	**£36,900**
P6.1 Review of existing data sets	**£90,000**
Quarterly detailed review of existing data including consumer research, insights, trends and other data produced by national and international organisations	**£30,000**
In-depth review of existing GSWTP data including volume and value, website user stats, business surveys, social media insights etc – initial in-depth review then quarterly update of website, social media engagement	**£30,000**
Work with sub-set of businesses to explore collation of data already collected by businesses e.g. postcodes, social media followers, booking data	**£30,000**
P6.2 Regular business and consumer research programme	**£199,000**
Regular business barometer (bookings, occupancy, comparison to previous year)	**£24,000**
Annual business survey (business performance, staff, challenges, opportunities, markets, seasonality)	**£10,000**
Visitor Survey (rotate destinations, so each destination covered every 3 years)	**£75,000**
Online consumer survey (visit patterns and perceptions of SW product among subscribed audiences)	**£25,000**
Online survey of GSWTP partners' website users for perceptions, booking behaviour, satisfaction and non-booking behaviour	**£15,000**
Consumer sentiment tracker – investment in social listening research to understand changes in sentiment about the region and individual destinations	**£50,000**
P6.3 Dissemination of research and data	**£30,000**
Interpret all data and research to make it relevant and useful for the industry	
Publish a quarterly update on data and research available to all tourism businesses (either as separate communication or as part of regular DMO newsletters)	
Programme of webinars and workshops to disseminate data but also teach businesses how to use and interpret their own data	**£30,000**
Annual total for Data programme	**£355,900**

P7: FUTURE DMO

Objective: Learn from best practice in disruptive technology led organisations to identify and trial new communication methods to build more sustainable and future proof model for Destination Management Organisations, using data and innovation to understand and reach audiences where they consume data

Outcomes and Key Performance Indicators:

- Report detailing best practice engaging consumers and new communication methods with 5 recommended pilot projects to increase engagement with visitors to the South West by end of December 2021
- 5 Pilot projects completed by October 2022 focused on reaching new visitor audiences for the South West measuring engagement, awareness, enquiries and bookings
- Report produced by December 2022 to evaluate pilot projects performance, compare to existing communication methods and make recommendations

Activity	Cost
Project Management (0.8 FTE) for 18 months	**£49,200**
P7.1 Review best practice and understand consumer engagement (9 months)	**£85,000**
In-depth review of communication and engagement plans of leading retail and disruptive technology based organisations to understand how they engage consumers	**£30,000**
Consumer research to build understanding of consumer buying behaviour of visitors to the South West destinations, working in partnership with businesses and nationally representative data sample	**£55,000**
P7.2 Marketing and development programme (9-18 months)	**£140,000**
Using insight from stage 1 above, identify new routes to market and trial 5 different engagement projects to identify new techniques that build brand loyalty, bookings and enquiries – particularly among new audiences	**£125,000**
Evaluate techniques and share best practice amongst partner DMOs	**£15,000**
Total	**£259,200**

BUILDING RESILIENCE

THE KEY OBJECTIVE OF BUILDING RESILIENCE IN THE VISITOR ECONOMY IS TO KEEP MORE OF VISITOR INCOME IN THE REGION AND REDUCE LEAKAGE TO COMPANIES BASED OUTSIDE THE REGION OR OVERSEAS AS WELL AS EXTENDING THE LIFE CYCLE AND VIABILITY OF THE VISITOR ECONOMY.

LOCAL SUPPLIERS

The use of local suppliers wherever possible is essential to grow the local economy and community wealth, keeping spend in the region. It also helps reduce the environmental impact of the sector, reducing delivery miles and supporting local communities.

One impact of Covid-19 has been the growth in interest in local products and supporting local businesses. In many areas, networks have been established to make it easier for local people to use local suppliers.

Across the GSWTP many DMOs felt that a number of tourism businesses are already using local suppliers, particularly and increasingly for food and drink. In many destinations it is considered to be a key pillar of inclusive growth and wherever possible local suppliers are used.

It is believed that micro and smaller businesses are more likely to use local suppliers whilst larger businesses and particularly those which are part of a chain are often restricted in their choice of supplier and cost may take precedence over any other factors.

There is further development opportunity to link local provenance with product development, for example by not only selling a local cheese but promoting visits to the cheese supplier, discover how it is made and then buy it to take home.

SAFE, FAIR AND LEGAL

The Great South West Tourism Partnership destinations will work with local authorities to introduce compulsory registration of accommodation. This would be a self-funded scheme with a small admin fee to register a property and ensures that there is a safe, clean and legal market place for consumers.

With an anticipated busy summer season for 2021, there is already evidence that some honeypot locations may experience over-tourism. The surge in demand is leading to an increase in pop-up camping, wild camping and homeowners renting spaces that have not had any safety checks. Whilst the partnership do not want to discourage new businesses from developing, there is a safety and reputational concern that some of these facilities will not meet the high standards guests expect. With new audiences considering a staycation for the first time this year, this risk is even greater.

A Compulsory registration scheme would enable all local authorities and DMO’s to know the exact size, scale and make-up of the accommodation sector. It would provide a system to contact all accommodation providers with updated guidance and legislation and level up the market so that all accommodation providers are compliant and have an equal cost base. Most importantly it would ensure that all visitors would have a safe experience in the South West.

STRENGTHENING BUSINESS NETWORKS

Across the South West there are a variety of business networks which play an important role in supporting business. They are an excellent vehicle for collecting information from individual businesses to understand key issues affecting the industry and to understand current trends and performance. Similarly, they work well as a means of distributing information to business, who are more likely to read an email from a trusted source.

The Great South West Partnership needs to identify where the successful groups are, consult them for advice and use them as a conduit for dissemination. They also need to identify where there are gaps in either sectors or geographical location and encourage the formation of new networks. The importance of these networks, particularly during the pandemic but also going forward, will support the projects being undertaken by the GSWTP. They can provide knowledge in the set-up stage, support through research and development and dissemination as projects near completion.

BUILDING RESILIENCE: BUSINESSES

- Analyse their current supply chain and consider how more local suppliers could be used
- Actively search for local suppliers and commit to using them wherever possible
- Use their local suppliers as a marketing tool
- Seek out and join local business networks

BUILDING RESILIENCE: DMOs

- Research local suppliers covering all aspects of the supply chain including food and drink, linen suppliers, cleaning, catering equipment, accountants, insurance etc.
- Conduct research with businesses to understand to what extent local suppliers are currently being used and what the barriers are to extending this
- Prepare a directory showing all relevant local suppliers categorised not only by item but also exact locations so that businesses can prioritise those that are really local.
- Organise networking, workshops, exhibitions and webinars to bring local suppliers together with businesses

P8: STRENGTHEN THE LOCAL SUPPLY CHAIN	
Objective: Increase use of local suppliers by tourism businesses to build resilience and support sustainability	
Outcomes and Key Performance Indicators: • Business survey completed by at least 500 businesses to understand current procurement practices by October 2021 • Supplier directory listing at least 500 businesses created by March 2022 • At least 4 networking / webinar events attended by total of 500 businesses to connect businesses with suppliers delivered by March 2022 • 2,000 businesses sourcing at least 20% of goods and services from local suppliers (to be reviewed once business survey • complete)	
Activity	**Cost**
Project Management (0.8 FTE for 6 months)	**£16,400**
P8.1 Planning and initial research (<3 months)	**£40,000**
Agree how suppliers are to be categorised in terms of product and distance e.g. very local, <25 miles, 25-50 miles, South West partner destinations, national	
Start to create map/database of suppliers by category, area etc showing location and company details	**£25,000**
In-depth business survey to understand current levels of local procurement across different suppliers	**£15,000**
Set targets for improvement for each sector/area/type of supply	
P8.2 Create local supplier resource (3-6 months)	**£75,000**
Create a supplier directory (ideally digital) listing all suppliers in the South West.	**£75,000**
Work with Food and Drink sector, LEP networks and other local business groups (Chamber of Commerce etc) to add to directory	
P8.3 Communications (ongoing)	**£35,000**
Launch directory	**£10,000**
Optional: series of exhibitions where suppliers can introduce their products	**Tbc**
Hold networking events and webinars explaining the benefits of using local supplies and how can be used as marketing tool	**£25,000**
Use local ambassadors and best practice case studies to encourage greater use of local suppliers	
TOTAL	**£166,400**

SKILLS AND EMPLOYMENT

TACKLING SKILLS AND EMPLOYMENT IS AN ISSUE THAT NEEDS TO BE ADDRESSED ACROSS THE WHOLE GREAT SOUTH WEST REGION ACROSS ALL SECTORS. WE DO NOT PROPOSE THAT THE TOURISM PARTNERSHIP TAKES A LEAD ON THIS BUT MUST WORK WITH EXISTING PROGRAMMES AT LEP, COUNTY AND CITY LEVEL TO ENSURE THAT THE SKILLS AND EMPLOYMENT PROGRAMMES AND PROVISION MEET THE NEEDS OF THE VISITOR ECONOMY. THIS MEANS REGULAR AND DETAILED COORDINATION BETWEEN THE SECTORS.

CHALLENGES

Traditionally tourism and hospitality has not been recognised as a career of choice. It has therefore not attracted the best candidates and is seen more as an entry level job or something to do in the holidays as opposed to a real career. To some extent this has been tackled with the introduction of courses at all levels from GCSE to Post-Graduate qualifications but there is still a need to change the perception of the industry. Key advantages of joining the sector are:

- Rapid career progression
- Huge opportunities for part time, flexible work
- Easy to work around family and other caring commitments
- Positive and friendly industry – delivering people's holidays and creating memories
- Opportunity to learn key skills which are relevant in many other sectors especially customer service, team working and line management
- International career opportunities

Research over recent years has identified a number of skills gaps within the industry, traditionally chefs, first line management, and soft-skills. More recently the lack of digital skills has been recognised throughout the workforce from entry level to management.

Addressing this issue will be key to driving productivity forward.

WHAT BUSINESSES CAN DO

- Commit to their staff by identifying skills needs and organising training where needed
- Be creative in employment strategy so that year-round jobs can be provided wherever possible, for example using staff to support maintenance and refurbishment over closed months
- Engage with training opportunities and use apprentices

WHAT DMOs CAN DO

- Provide dedicated and tailored training and business support where gaps in provision exist
- Engage with training providers, education establishments, local authority and LEP Skills board to make sure that the needs of the Visitor Economy are known and understood and investment in provision aligns with the needs of the industry
- Engage with national initiatives to ensure the South West's needs are incorporated within national Visitor Economy provision

P9: COLLABORATION WITH EXISTING SKILLS NETWORKS	
Objective: Ensure that the needs of the Visitor Economy in the South West are incorporated in existing frameworks and activity for skills and employment within the region, as well as working with national skills programmes for the Visitor Economy	
Outcomes and Key Performance Indicators: • Regular engagement with Skills board, training providers and education establishments • Targeted increase in apprenticeships, mentorships and kickstart placements	
Activity	**Cost**
Project Management (0.4FTE) for 18 months	**£24,600**

MARKETING AND COMMUNICATIONS

MARKETING AND COMMUNICATIONS SHOULD BE A KEY ACTIVITY FOR THE GSWTP. SOME PARTNERS MAY NOT WISH TO ENGAGE WITH EVERY MARKETING CAMPAIGN, BUT ACTIVITY SHOULD ENSURE THAT THE BENEFITS OF EACH CAMPAIGN IS REALISED ACROSS ALL PARTS OF THE REGION. CONTINUING TO COMMUNICATE TO NATIONAL STAKEHOLDERS AND LOBBY FOR SUPPORT AND INVESTMENT IN THE VISITOR ECONOMY IS UNANIMOUSLY SUPPORTED BY PARTNERS AND CONSIDERED A KEY ROLE OF THE PARTNERSHIP.

For future consumer communications, marketing materials should be directed to the South West Website www.visitsouthwest.co.uk which has links to DMO websites across the region. Given the strong appeal of the south west with the domestic audience and potential with overseas visitors and business events, the Visit South West brand is an untapped resource that complements the work of the individual DMOs and could open up entirely new audiences keen to explore the region.

DOMESTIC MARKETING

The strength of the South West product for the domestic market is unequivocal, evidenced through its consistent number one spot for overnight domestic visits and most desired location on the VisitEngland Consumer Sentiment Tracker. Working together through this partnership though there is an opportunity to present lesser-known areas of the South West to familiar audiences and celebrate the diverse visitor offer and unique qualities of each of the partner destinations.

For the initial recovery of the sector post-Covid-19 region-wide marketing should focus on extending the season into the Autumn and Winter period 2021-22, promoting the region as a safe destination, reaching audiences that would not normally holiday in the UK and as a vehicle for dispersing visitors across the region away from honey-pot locations.

Longer-term, South West domestic marketing should focus on attracting new markets, the year-round proposition and cross-promotion within the region to ensure that visitors return to the South West.

In terms of domestic visitors, the region needs to market the area as the perfect destination for:

- **ACCESSIBLE TOURISM**
- **SUSTAINABLE TOURISM**
- **EXPERIENTIAL TOURISM**
- **ACTIVITIES AND ADVENTURE**
- **WELLBEING**
- **CULTURAL TOURISM**
- **BUSINESS VISITS AND EVENTS**

These are all year-round growth markets relevant to the south west.

OVERSEAS MARKETING

Currently overseas visitors make up 8.6% of overnight trips but contribute more than 15% of overnight spend. Building on this market will clearly improve the overall value achieved per visitor. Additionally, overseas visitors tend to be more willing to travel in the shoulder period and therefore less dependent on the peak summer season.

However, this market is also the one which has been most affected by Covid-19 so is likely to need significant help to rebuild. With long lead-in times for International Travel Trade and long-haul markets, activity needs to begin as soon as possible to rebuild international visits for the 2022 and 2023 seasons. The region needs to agree priority markets to focus on, being mindful of the aspiration to reduce the overall carbon footprint so promoting sustainable transport options wherever possible.

It is recommended that the partnership focuses on western European markets where there is huge interest and untapped potential, particularly among those interested in outdoor activities, heritage and culture. The North American market is also increasingly important, but activity should focus on persuading visitors who are committed to coming to the UK anyway, to visit the South West and highlight sustainable ways to undertake their visit in order to limit their overall carbon footprint.

LOBBYING

The value of the collective voice of DMOs across the South West has been realised over the last 12 months, with the GSWTP being highly successful in raising the issues impacting the sector and getting support for businesses and the wider recovery of the sector. This representative position should continue to be a key focus of the group, liaising with MPs, Ministers, central government departments, Visit England / VisitBritain, LEPs and other key stakeholders.

WHAT BUSINESSES CAN DO

- Align their marketing messages to local and regional marketing campaigns
- Provide links back to the DMO from their website.
- Support their local DMO through membership and engagement in communication activity
- Connect their booking systems to the DMOs via TXGB or other providers

WHAT DMOS CAN DO

- Develop marketing campaigns with key themes and provide partner toolkit so members and other stakeholders can engage with the campaigns.
- Focus on marketing which benefits the whole region and / or cannot be achieved individually
- Actively support cross marketing between regions
- Adopt GSWTP-wide marketing campaigns and incorporate into their own activity
- Actively engage their businesses and members in GSWTP activity
- Collate information and insight to feed into the region-wide lobbying
- Represent the whole region as well as their local destination when engaging with national partners and stakeholders

P10: PROMOTE THE SOUTH WEST AS THE KEY VISITOR DESTINATION

Objective: Use joint marketing to support a quick and sustainable redevelopment of the sector with domestic, international and business events markets

Outcomes and Key Performance Indicators:

- Increase in engagement with Domestic audience of 10% across all GSWTP destinations
- 5 Domestic marketing campaigns delivered by October 2022 focused on growth segments and year-round offer generating 10% increase in bookings via DMO websites
- Overseas marketing plan developed and relationships established with 15 key international travel trade operators by end December 2021, 15 new South West products created and on sale by end December 2022
- Business events development plan produced by end of October 2021 identifying key opportunities for SW vertical sectors over next 5 years – target to convert 10% to confirmed events by end December 2022
- Four GSWTP briefing papers per year produced for key stakeholders, LEPs, MPs and Ministers

Activity	Cost
Project Management (1 FTE) 18 months for Domestic Marketing	**£61,500**
(0.6 FTE) 18 months for International Marketing	**£36,900**
(0.6 FTE) 18 months for Business Events	**£36,900**
(1 FTE) 18 months Digital Marketing Executive	**£54,600**
P10.1 Domestic Recovery (6 months)	**£750,000**
Invest in upgrade and maintenance of visitsouthwest.co.uk as portal for all joint marketing activity	
Set up a marketing sub-group to agree all activity and report in to main GSWTP	
Agree marketing plan for next 12 months focused on visits in Autumn and Winter and dispersal of visitors across lesser-known areas of South West, as well as key messages of book before you travel, Respect, Protect and Enjoy	
Bid for additional funds available from Government Recovery Funds	
P10.2 Domestic growth markets (18 months)	**£3,000,000**
Develop a domestic marketing plan focussed on attracting visitors out of the main holiday season – bespoke plan for each of the following markets • Accessible tourism • Sustainable tourism • Experiential tourism • Activities and Adventure • Wellbeing • Cultural tourism Budget of £500,000 per market	
Align marketing with product development initiatives promoting activities that are relevant year-round and highlight the full range of products and experiences that can be enjoyed across all the south west partner destinations	
P10.3 Overseas Marketing (18 months)	**£1,500,000**
Develop international marketing plan including travel trade, consumer shows digital and PR activity, including familiarisation visits for trade and media	
Agree GSWTP overseas branding, develop key itineraries and agree hero products to engage overseas visitors relevant to different market needs	
Key European markets – Primary: Germany, Netherlands Secondary: France, Spain, Italy and Nordics	
North America: US and Canada	
Other markets: work with global Ground Handlers and DMCs, as well as focus on promoting the South West to visitors already in the UK (short breaks from London)	
P10.4 Business visits and events (18 months)	**£1,500,000**
Review current market opportunities and develop marketing plan and pipeline of events for the next 2-5 years	
Attend key business and MICE events to represent the GSWTP destinations collaboratively	
P10.5 Lobbying and strategic communications (18 months)	**£36,900**
Secretariat for group comms (0.2 FTE)	**£18,450**
Use business survey data and other business insight to produce regular GSWTP briefing documents and press releases	
Identify key media spokesperson(s) for the South West region (0.2 FTE)	**£18,450**
Ensure regular reports / briefings to APPG South West, LEPs, DCMS, Tourism Minister, VisitBritain / VisitEngland and other key stakeholders	
TOTAL – 18 month programme	**£6,976,800**

IMPROVE CONNECTIVITY

THE CONNECTIVITY OF THE VISITOR ECONOMY HAS A SIGNIFICANT IMPACT ON PERFORMANCE AND COVERS A WIDE RANGE OF ISSUES, BROADLY CATEGORISED IN THIS CONTEXT AS TRANSPORT CONNECTIVITY (TO AND AROUND THE REGION) AS WELL DIGITAL CONNECTIVITY. WITH LARGE PARTS OF THE REGION BEING RURAL AREAS, IMPROVING CONNECTIVITY COULD SIGNIFICANTLY IMPROVE THE EFFICIENCY AND PRODUCTIVITY OF THE VISITOR ECONOMY.

TRANSPORT CONNECTIVITY

GSWTP members are generally in agreement that the current transport both to and within the South West could be improved to support the development of the tourism industry. The long-discussed intention to make the A303 connecting London to the South West into a dual carriageway would be beneficial for many parts of the region but would not sit well with sustainability intentions. Similarly, there are calls for improved road links across the region which would make it easier for visitors to the eastern end of the region to access the western destinations and enable visitors to easily explore more of the south west on one trip.

Rail networks into and around the area are also in need of improvement. Ideally major infrastructure improvements are required to shorten the rail journey time from London to the region. If this is prohibitive adjustments to timetables and fare structure could still enable significant improvements and make it easier for passengers to use interconnecting services and switch to public transport.

Within the region, there are some parts where local public transport systems work well – for example in Torbay where buses, trains and ferries link up to make car-free travel easy and enjoyable. Similar schemes need to be created across the region to encourage visitors to explore the region using sustainable transport options.

The role of the GSWTP should be to work with transport providers, local authorities and LEPs to influence investment.

DIGITAL CONNECTIVITY

It is imperative the tourism industry keeps pace with global developments in terms of embracing technology and engaging consumers at the point they wish to be engaged. The rise of digital platforms, the sharing economy, big data and automation all intensify focus on the productivity challenge.

Data-driven innovation can be relatively easily implemented due to the increasing quantity of data from user-generated content or consumer data. Some large travel firms are tackling this well but generally there are barriers in the form of lack of data analysis skills and competences in the workforce and the limited scope for organisational change and infrastructure.

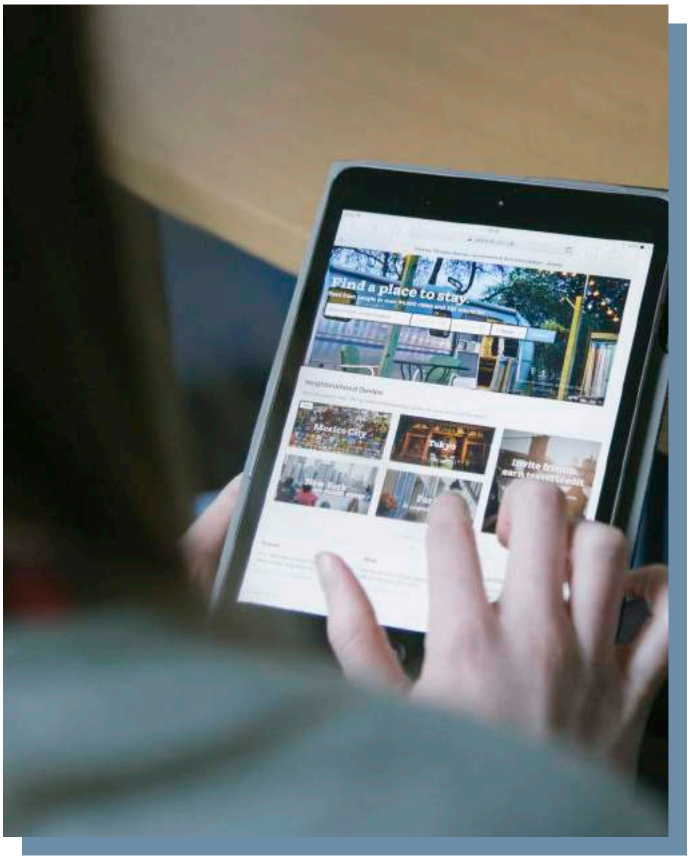
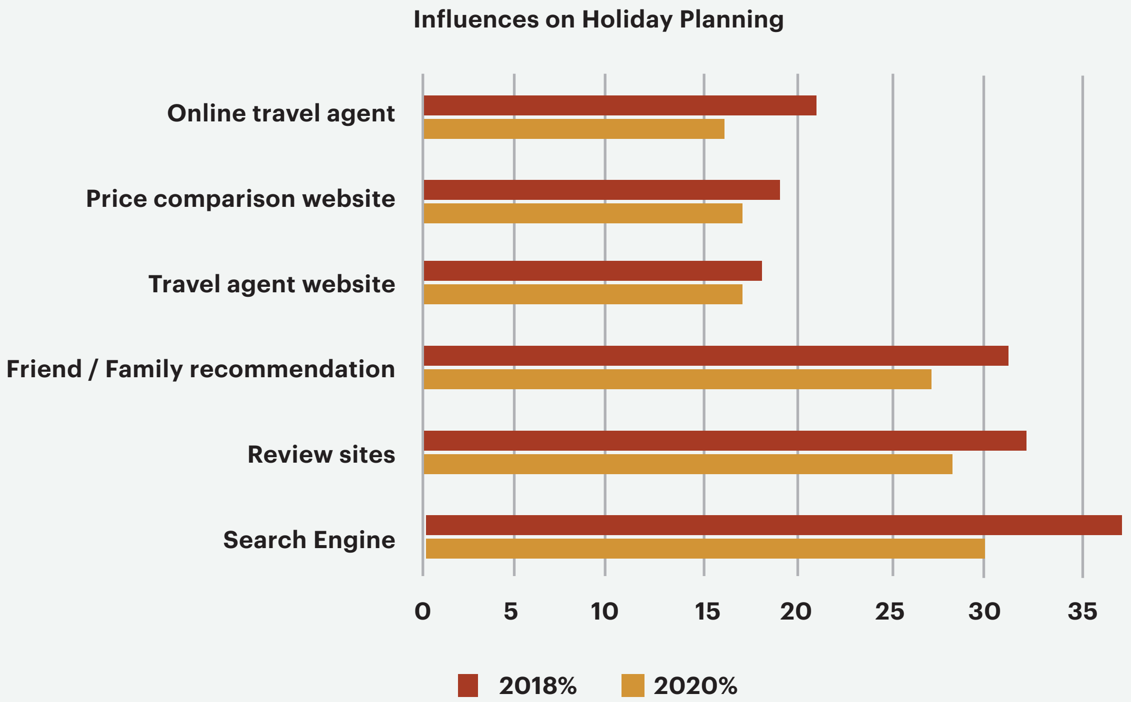


Table 3 below shows how important digital technology is in influencing holiday planning.



For smaller businesses in particular the use of social media as a marketing tool is still at a low level in the South West.

During Covid-19 a number of tourism businesses have been forced to digitalise parts of their business, offering online booking, QR codes for track and trace, virtual check-ins and ordering services to reduce contact and maintain social distancing. However, the full extent of this digitalisation has not been measured or quantified and there is further work needed to understand priorities for further digitalisation.

The most recent GSWTP business survey asked recipients what digital skills support they would like. The survey identified that whilst a third of businesses felt they did not need digital skills support, almost half wanted support with Search Engine Optimisation (SEO) and 13% needed support in creating a website – suggesting a wide variation in the needs of the sector.

Table 4. Results of GSWTP business survey on digital skills needs

What (if any) support do you need with improving the digital presence of your business?	
Improving Search Engine Optimisation	**46%**
Improving social media presence and engagement	**41%**
How to use your data effectively to target new customers and improve your business	**30%**
Developing digital marketing strategy / advertising campaign	**26%**
Using data to know more about my customers and how to target them	**25%**
Creating a website	**13%**
Adding online bookability to my website	**13%**
Improving use of technology in day to day operation (e-Check-in, food ordering etc)	**13%**
Implementing revenue management (flexible pricing)	**11%**
None of these	**32%**

HOW TO HELP

WHAT BUSINESS CAN DO

- Promote local transport where available.
- Lobby to improve services
- Offer to collect guests from local stations to support arrival by public transport
- Invest in technology to improve their digitilisation
- Employ staff that have digital skills or seek out relevant training courses

WHAT DMOs CAN DO

- Work with national and local transport providers, local authorities and LEPs to improve services and support sustainable transport options
- Provide digital skills training courses specific to Visitor Economy needs
- Offer wider business support and access to specialist advice
- Encourage skills providers to increase business training focused on digital needs
- Investigate possibility of implementing skills sharing by offering digitally qualified people to support a number of businesses in one area. This could be particularly relevant for Social Media

P11: DIGITALISATION OF THE DESTINATION	
Objective: Improve digital footprint of at least 250 tourism businesses	
Outcomes and Key Performance Indicators: • Business survey completed by at least 500 businesses identifying current digital footprint and skills needs as well as qualitative research report to further understand barriers to digitalisation completed by end December 2021 • Specialists to support at least 100 businesses to improve their systems by October 2022 • Train 10 digital champions who can support businesses by March 2022 • Training programme to engage at least 150 businesses by October 2022	
Activity	**Cost**
Project Management (0.8FTE) for 18 months	**£49,200**
P11.1 In-depth review of provision and needs (<3months)	**£32,500**
Business survey to understand current levels of digitalisation across businesses including: website provision, social media presence, online booking, e-Check-in etc. also barriers to digitalisation (hardware, skills, interest, time) and skill needs	**£7,500**
Optional: Qualitative research on barriers to digitalisation	**£25,000**
Review research findings and agree specific targets for bookability, social media engagement etc	
P11.2 Business support for digitalisation (9-12 months)	**£225,000**
Actively promote existing support schemes and free tools to support digitalisation such as online booking systems	**£50,000**
Appoint a digital specialist to support businesses to improve their systems and knowledge	**£75,000**
Comprehensive training programme to help businesses (and DMOs) understand how to use digital methods better including social media and producing high quality digital content	**£50,000**
Train digital champions (link to universities and creative sector) who can support a number of different businesses in an area	**£50,000**
P11.3 Lobby for structural improvements (ongoing)	
Work with LEP and local authorities to improve Broadband, 5G and ongoing digital structural investment throughout the South West region	
TOTAL	**£306,700**

TOWARDS 2030: ACTION PLAN INVESTMENT

THE GREAT SOUTH WEST TOURISM PARTNERSHIP IS SEEKING AN INVESTMENT OF £10 MILLION TO SUPPORT THE DELIVERY OF THIS ACTION PLAN WHICH WILL SUPPORT THE VISITOR ECONOMY TO BUILD BACK BETTER AND CHART A NEW COURSE THAT DELIVERS A MORE SUSTAINABLE, YEAR-ROUND INDUSTRY THAT IS WORLD-LEADING IN ITS INNOVATION, QUALITY AND ACCESSIBILITY.

The Great South West Tourism Partnership is seeking an investment of £10 million to support the delivery of this Action Plan which will support the Visitor Economy to Build Back Better and chart a new course that delivers a more sustainable, year-round industry that is world-leading in its innovation, quality and accessibility.

Specifically, the plan will:

- Re-launch Visit South West as a leading year-round destination for key UK growth markets, international visitors and business events including:
  - Autumn – Winter 2021-22 off-peak marketing campaign to stretch the season and ensure South West remains a top choice for consumers as the global market recovers and competition increases
  - Develop the International visitor and travel trade pipeline (currently planning 2022/23) and secure new South West products with travel trade operators
  - Develop the Business events pipeline – focused on key vertical sectors for region (2-3 year lead time)

- Digitalisation of sector - Business Support focused on digital skills, online booking and using data to provide market intelligence
- Laying foundation to Build Back Better for 2022 and beyond
  - Product development – aligned to growth markets, sustainable and accessible travel and business events
  - Improving data and transforming the sustainability of the sector as well as working towards becoming the most accessible destination in the UK
  - Holistic programme of support for businesses to improve digital, sustainable, accessible

The Action Plan investment would deliver the following projects outlined above:

P1: A sustainable Visitor Economy	
	£472,400
P2: Business Support – Sustainability	
	£171,900
P3: Make the South West the most accessible destination in the UK	
	£399,200
P4: Accessible tourism - Business Support	
	£241,900
P5: Reduce seasonality of the current Visitor Economy - Product Development	
	£604,000
P6: Data-led decision-making	
	£355,900
P7: Future DMO	
	£259,200
P8: Strengthen the local supply chain	
	£166,400
P9: Collaboration with existing skills networks	
	£24,600
P10: Promote the South West as the key visitor destination	
	£6,976,800
P11: Digitalisation of the destination	
	£306,700

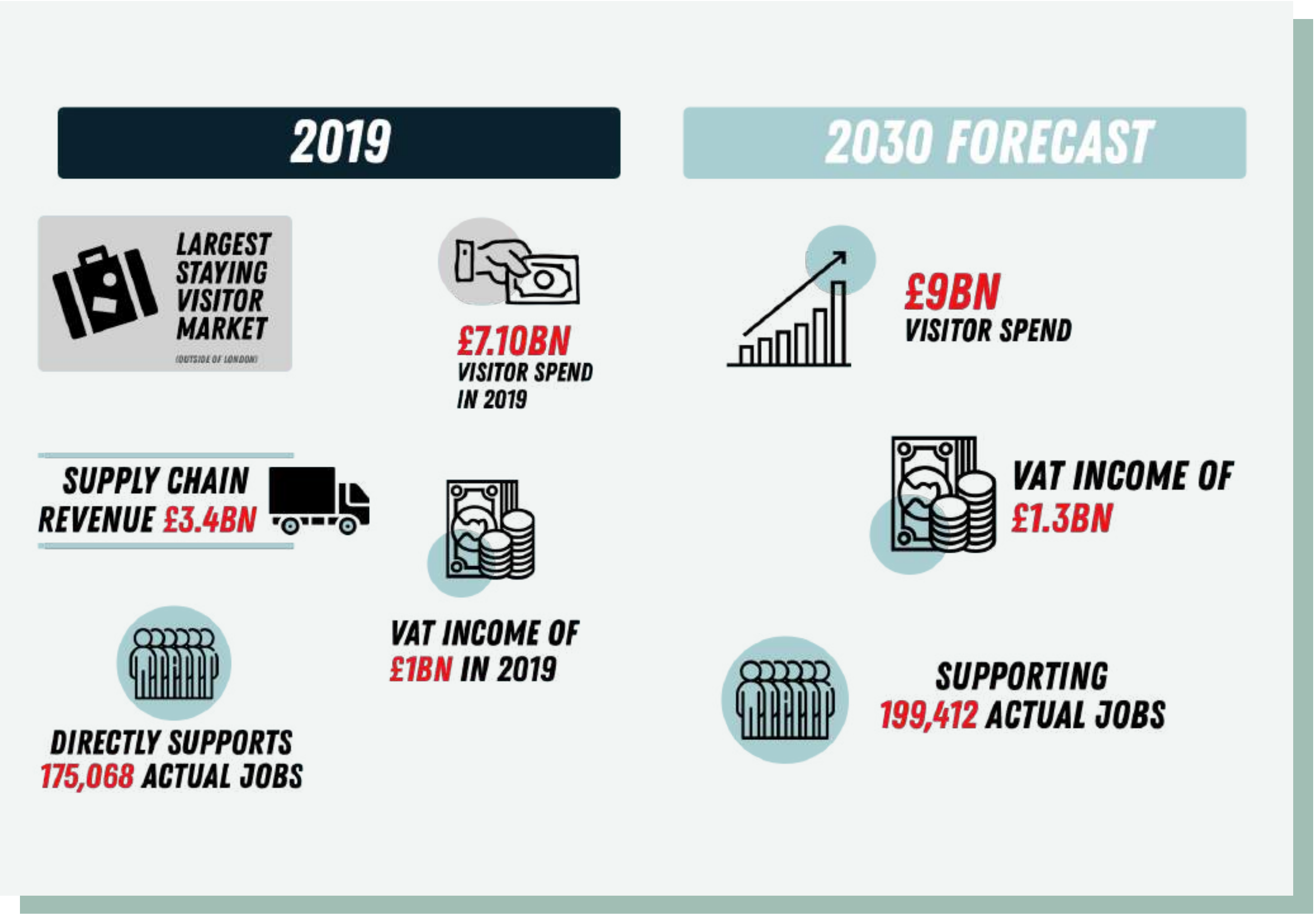
Overall investment in the programme for 18 months activity £9,979,000

It is recommended that business support programmes P2 sustainability, P4 accessibility and P11.2 digital are delivered holistically to maximise engagement from businesses and ensure businesses can benefit from all programmes should they wish to.


BD1

BUSINESSS CASE FOR INVESTMENT

THE GREAT SOUTH WEST TOURISM PARTNERSHIP IS SEEKING AN INVESTMENT OF £10 MILLION TO SUPPORT THE DELIVERY OF THIS ACTION PLAN WHICH WILL SUPPORT THE VISITOR ECONOMY TO BUILD BACK BETTER AND CHART A NEW COURSE THAT DELIVERS A MORE SUSTAINABLE, YEAR-ROUND INDUSTRY THAT IS WORLD-LEADING IN ITS INNOVATION, QUALITY AND ACCESSIBILITY.



As the largest staying visitor market (outside London), prior to Covid-19 generating a visitor spend of £7.1bn, supporting 133k FTE jobs and supply chain revenues of £3.4bn, the South West offers a significant opportunity to accelerate the recovery of the Visitor Economy and deliver a more sustainable, reimagined industry that meets the government's ambitions to Build Back Better and Level Up.

It is calculated that the Visitor Economy in the GSWTP region in 2019 directly contributed £681m in VAT income to government plus an additional £342m VAT income realised through the supply chain. **A 10% increase in Visitor Economy revenues in the SW at the 5% VAT rate, could deliver up to £33.3m increase to Government in VAT revenue alone in 2021.**

In addition, it would safeguard a significant proportion of the 160,000 furloughed staff in the SW and reduce the outgoing costs of the Job Retention Scheme and Self-Employed Income Support Scheme.

Rural and coastal destinations provide a Covid-safe environment to accelerate recovery and deliver against the Government's ambition to Level Up.

With 74% of businesses reporting a change in consumer profile in 2020, a region wide investment to proactively target new consumer groups, leveraging digital innovation, could significantly boost recovery.

RETURN ON INVESTMENT

To support the case for investment, the South West Research Company was employed to produce a range of forecasts for the Visitor Economy in the Great South West partner destinations to 2030 based on three scenarios:

- Basic level of investment (low) representing a decrease in destination activity and investment
- Maintain the current level of investment (mid) representing a continuation of the status quo
- Significant increase in investment (high) representing a significant and sustained increase in investment and activity

The forecasts showed that by 2030 the annual scale of the Visitor Economy across the Great South West Tourism Partnership destinations across the three scenarios could be:

GSWTP destinations	2030 (low)	2030 (mid)	2030 (high)
Visitor related spend (£m)	£8,272.19	£8,624.21	£9,050.61
Per annum average change	1.2%	1.7%	2.2%
Growth 2019-2030	13%	18%	24%
Total business turnover (£m)	£11,732.07	£12,232.50	£12,840.27
Per annum average change	1.3%	1.8%	2.3%
Growth 2019-2030	15%	19%	25%
Actual jobs	182,069	189,874	199,412
Growth 2019-2030	4%	8%	14%

Source: South West Research Company – GSWTP Forecast to 2030

If investment in the Action Plan and subsequent similar plans thereafter was achieved, the Visitor Economy would be 24% larger across Cornwall, Isles of Scilly, Devon, Dorset and Somerset by 2030. The represents and additional £3.2bn in visitor spend, £4.5bn business turnover and 9,538 actual jobs supported in the period from now until 2030.

Using the information contained in the forecast, it has been calculated that this increased investment would also generate an additional £451m of VAT income to HM Treasury by 2030.

By contrast, if the investment in the Visitor Economy decreased, it would equate to £2.6bn loss in visitor spend, £3.7bn loss business turnover and reduction of 7,805 jobs supported relative to the mid-range forecast (which assumes the status quo).

This Action Plan also has big ambitions to reduce the environmental impact of the Visitor Economy, if 100 businesses could be supported to reduce their energy use to the same levels as the business example quoted on page 14, that would equate to a carbon saving of 3,000 tonnes per year. If 100 businesses each year between 2021 and 2030 converted it would equate to 138,000 tonnes of carbon saved.

BASED ON AN INVESTMENT OF £10 MILLION FOR THIS INITIAL 18-MONTH ACTION PLAN AND THEREAFTER ASSUMING AN INVESTMENT OF £6.5 MILLION PER ANNUM, THE OVERALL RETURN ON INVESTMENT WOULD BE 51:1 BASED ON THE INCREASED VISITOR SPEND.

DELIVERING GROWTH

Growth in the Visitor Economy in the South West cannot be achieved increasing visits in July and August which represent max capacity at pre-Covid levels. Therefore, in order to deliver growth to the 2030 high range forecast, a number of different scenarios must be considered. To follow are just a few examples of how the forecast growth could be achieved:

- Increase the number of visitors and associated spend by doubling overseas visitors, plus increasing domestic overnight visitors by 50% January-March, 10% in April, 30% in May, 10% in June, 35% in September and 40% October-December
- Increase visitor spend by £6.44 per day visitor, £16.16 per night for domestic overnight visitors and £22.38 per night for overseas visitors
- Increase the length of stay – convert two million day visitors per year to overnight visitors, plus increase the length of stay of domestic visitors by 0.5 nights and overseas visitors by 1.5nts

In reality, it will be a combination of these options that deliver growth and this Action Plan focuses on initiatives that will enable growth to be focused on increased spend, length of stay and the seasonal spread of visitors.

TIMELINE

This Action Plan covers an 18-month period of activity to commence as soon as possible Summer 2021. Progress should be monitored at partnership level at least every 3 months in order to ensure progress is on track to deliver the outcomes and aspirations of the plan.

RISKS

The key risks to delivery of the Action Plan are access to funding and the ongoing Covid-19 situation. The forecast models and return on investment presented assume a return to 2019 performance by 2022 based on normal (pre-Covid) operational capacity, social-distancing being removed and international markets able to travel freely to the UK. An ongoing review of the Covid-19 situation and individual programme risk registers should be monitored by the GSWTP board and the outputs and timing of the overall delivery plan adjusted accordingly.

THE GREAT SOUTH WEST TOURISM PARTNERSHIP

IN ORDER TO DELIVER THIS ACTION PLAN IT IS RECOMMENDED THAT THE GREAT SOUTH WEST TOURISM PARTNERSHIP ADOPTS A MORE FORMAL TERMS OF REFERENCE WHICH CLEARLY STATES THE ROLE OF THE GROUP AND TERMS OF MEMBERSHIP AND REPRESENTATION

GOVERNANCE AND STRUCTURE

As an open, inclusive and non-exclusive partnership, membership should be widened to enable any other DMOs in the Great South West Tourism Partnership destinations to join provided they are willing to commit to engaging and supporting the group and the aims of the partnership. Membership of the GSWTP does not preclude partners joining other sub-regional or national activity.

The GSWTP should appoint an independent Chair and Vice-Chair with fixed terms (suggested 2 years) and an official secretariat for the partnership. Given the current role of the TDA (Torbay Development Agency) supporting the group, this should be explored as an option for the secretariat. Chair and Vice Chair positions should be independent members not from any of the DMO partners and voted for by members of the GSWTP. Previous roles as Chair do not preclude an individual from serving as Vice Chair in the future and vice-vera.

It is recommended that partners volunteer to lead themes in this Action Plan that align to their own skills, interests and expertise. Where there is more than one partner wishing to lead a theme, a joint-working arrangement could be made, provided there is one overall lead. The content of the Action Plan and lead for each theme should be reviewed annually.

Any funded activity should be directed through one lead organisation with work packages agreed to deliver the programmes of work. It is recommended that the lead organisation is one of the Local Authorities within the Great South West Tourism Partnership.

Whilst sub-groups and funded project boards may need to meet more regularly, it is recommended that once the Covid-19 situation has improved, the GSWTP meets monthly for a longer meeting of up to 3 hours. Meetings should remain virtual initially to ensure high engagement in activity, with one physical meeting per year (subject to restrictions).

A strategic sub-group should be created with the Chair, Vice-Chair, Secretariat and 3 other nominated partners. This sub-group will meet at least quarterly and provide a bi-annual update / presentation to the three LEP boards (Cornwall and Isles of Scilly, Heart of South West and Dorset LEP). Strategic sub-group meetings should be open to attendance by the LEP Chief Executives or LEP Tourism Representatives and minutes of these meetings shared with the full GSWTP membership. The strategic sub-group will oversee corporate communications, funding applications and any review of the Action Plan and strategic direction of the group. All decisions must be ratified by the full Great South West Tourism Partnership.

Finally, it is recommended that the GSWTP membership ensure that as a minimum it has a representative from each destination and ideally from key industry sectors so as to ensure a balance of DMO and Industry representation. Where possible Industry representatives should be able to represent the views of their entire sector in a semi-formal capacity (e.g. as member of industry network or association). Membership should aim to include:

- Cornwall
- Isles of Scilly
- Devon
- Plymouth
- Torbay
- Somerset
- Dorset
- Bournemouth, Christchurch and Poole
- Serviced Accommodation
- Non-serviced accommodation
- Attractions and activities
- Food and drink
- Arts, Culture and events
- Business Events
- National Parks
- Transport

A member can represent more than one category.

WORKING IN PARTNERSHIP

The GSWTP is not an exclusive partnership and there will be occasions where it is useful to join together with other organisations not just as individual members but as a collective – for example working with the West Partnership (Bath, Bristol and N Somerset), Tourism South East, the National Parks Association or National Trails Alliance. This level of activity should be agreed by the partnership on a case by case basis.

The GSWTP will work closely with the Local Enterprise Partnerships – with tourism as a key area of work for each of the LEPs, the LEPs are supportive of the partnership, the Action Plan and strategic priorities The GSWTP can support the LEPs' inward investment objectives in key vertical sectors through showcasing the region and attracting key business events. It can also help the LEPs to deliver green and inclusive growth.

The GSWTP would like to work in partnership with the LEPs and local authorities across the region to access funding and investment to deliver this plan. In addition, the LEPs can help the GSWTP connect to other sectors to support delivery of Action Plan and strategic aspirations, for example: Skills and Employment engagement, working with Universities, FE and government programmes as well as partnerships with the creative and digital sector to drive innovation.

TOGETHER WE CAN BUILD RESILIENCE, BUILD BACK BETTER AND STRENGTHEN THE ECONOMY ACROSS THE REGION.

CIOS LEP CORNWALL & ISLES OF SCILLY LOCAL ENTERPRISE PARTNERSHIP

heart of the south west local enterprise partnership

DORSET Local Enterprise Partnership

islands partnership | ENGLISH RIVIERA BID COMPANY | Plymouth Britain's Ocean City | The South West Tourism Alliance | Visit Cornwall | VISIT DORSET | Somerset | visit exmoor | visit devon | visit exeter