

Cornwall

November 2007

Background and Content

- Tourism is vital to the well-being of Cornwall and accounts for 24% of GDP.
- The industry supports over 49,000 jobs and generates over £1.5 billion to the local economy.
- Cornwall is regarded as a pioneer of modern tourism and is England's most popular destination after London and Devon.
- The County has a strong image and brand and high levels of awareness as a holiday destination.
- It continues to suffer from peripherality and seasonality.
- From late 1970s until mid 1990s economy in decline and tourism characterised by low spend, long stay, declining markets, tired product and lack of investment.

Transformation and Renaissance

- Mid 1990s Regional Tourist Board with Cornwall County Council prepared bold strategy to regenerate tourism in Cornwall based upon:
 - Creation of at least three iconic, international-quality attractions;
 - Attracting internationally renowned leisure brands;
 - Growing the local food and drink product;
 - Building upon the County's heritage of art (the St Ives School), surfing and maritime tradition;
 - Improving access to the country.
- The strategy identified the following opportunities:
 - (i) Iconic Attractions**
 - Supporting the Lost Gardens of Heligan and maximising the TV coverage of their restoration;
 - Attracting The Tate to St Ives;
 - Developing a national surfing centre and surfing event;
 - Attracting the National Maritime Museum to open an outstation in Falmouth;
 - Developing festivals and events;

- Supporting the Eden Project as a Millennium project and its year round events programme.

(ii) Improving Access

- Creating the South West Coast Path (300 miles of the 630 miles is in Cornwall) and other long distance routes and the Cornish Way Cycle Path;
- Developing Newquay Cornwall Airport and route development by Ryanair;
- Improving the A30 and A38 road infrastructure;
- Developing the cruise industry, increasing the number of liners from 55 in 2000 to over 100 in 2006.

(iii) The Planning System

- Creating a planning system that is supportive of tourism growth.

(iv) World Heritage Status

- Making a collective bid for WHS for 20,000 ha over ten former tin mining areas attracting over 6.7 million trips each year;
- Cornwall Tourism Forum has benefited from £2.7 million of money for marketing including £1.5 million Objective One backed by funding from Cornwall Enterprise, DC and RDA;
- The Eden Project attracts over 750,000 a year and has an estimated economic impact of £125 million per annum along with major media and PR activities.

Volume and Value 2005 – Key Facts

(A) Day Visitors

- 9.33m day trips
- £383m expenditure
- Average per capita spend per day = £41.05

(B) Overnight Trips

- 4.39m trips
UK 4.1m trips (93%)
Overseas 0.29m trips (7%)
- Total nights 25.3m (avg stay = 5.8)
UK 23.4m (avg stay = 5.7)
Overseas 1.9m (avg stay = 6.6)
- Total spend = £1.1bn
- Plus (i) second home spend = £7.9m
(ii) SFR spend = £39.9m
- All spend by all tourists = £1.5bn

- Average spend c£228 per trip

(C) Employment

- Direct 35,293
- Indirect 7,964
- Induced 5,897
- Total 49,174
- 21% of all employment
- 36,273 FTEs

(D) Analysis of Spending

	Day	%	O'Seas	%	UK	%
Accommodation	-	-	36m	31	366m	37
Shopping	140m	35	33m	28	125m	13
Food and Drink	155m	40	25m	21	216m	22
Attractions / Ent	42m	11	13m	11	107m	11
Travel	49m	14	11m	9	163m	17
	386m	100	118m	100	977m	100

(E) Visitor Profile and Patterns 1993 - 2005

- Significant growth of short breaks and extra holidays at expense of main holiday;
- Car has remained primary means of transport. However increase in air travel to Cornwall with opening of Newquay and expansion of Plymouth Airports;
- Trips lasting less than a week now comfortably outnumbering those lasting longer than a week;
- The proportion using serviced accommodation increasing steadily since 2000;
- High levels of repeat visits;
- Since 2002 the number of visitors in ABC1 social groups has outnumbered those in blue collar and other groups for first time showing shift to higher value tourism.

Current Issues and Strategies

1. Improve transport infrastructure and accessibility.
2. Develop local food and drink sector.
3. Improve quality.

4. Support World Heritage Status.
5. Continue to support iconic attractions and products.
6. Addressing seasonality.

Organisation

- The Cornwall Tourism Forum established to lead tourism regeneration in late 1990s early 2000 now considering DMO formation.
- The Forum consists of public and private sector bodies including the commercial Tourism Federation.
- Cornwall is moving to a County-wide DMO. However, there is a debate about the need to create sub-regional DMOs.
- Proposals exist for a County-wide DMO as the lead body for tourism with board of directors including:
 - Cornwall Enterprise x 1
 - District Council x 2
 - South West Tourism x 1
 - Private Sector x 4.

Critical Success Factors: Past Five Years

- Clear vision and strategy;
- Policy convergence and framework with clear roles and responsibilities;
- Public policy alignment across all organisations;
- Private sector;
- Strong branding, positioning and marketing;
- Availability of Objective 1 resources;
- Investment in iconic attractions including arts and culture, along with improved access;
- Developing the creative industries;
- Stimulating quality food and drink offers;
- Attracting internationally known ...
 - ... chefs (Rick Stein, Jamie Oliver);
 - ... brands (National Maritime, Tate, Eden);
- Building on naturally existing themes and heritage with modern twist.

Sources:

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