

6 REGIONAL TOURISM PRODUCT OVERVIEW

The previous chapter looked at the regional tourism product from the point of view of individual tourism businesses and industry sectors. This chapter looks at it in terms of the different types of destination that make up the South West region.

The premise is that broadly similar types of destination, which face common issues and problems, can be found across the region, even though they may have different historical backgrounds, geographical locations and ease of access to markets.

Looking at the region in this way could help the regional strategy and action plan identify some common approaches and prescriptions and some broad programmes of wide application. It should save having to reinvent the wheel for every district.

We have identified the following broad destination types which could be refined into further subdivisions in due course.

- Inland countryside
- Protected rural areas
- Seaside resorts
- Rural coast
- Large towns and cities
- Small towns and cities

For each of these we have produced a destination summary which sets out the broad characteristics, the distinctive nature of the tourism product and offer, and the challenges and opportunities presented. In preparing these we have drawn upon the focus group research, business survey, UKTS/IPS and other published material. We have not talked to the individual destinations themselves.

Each destination type is described in the following terms:

- Incidence, significance in region
- Destination characteristics
- Image and appeal
- Tourism product
- Business performance
- Markets
- Issues and opportunities

Figure 6.1 shows how these destination types are distributed around the region by highlighting the predominant characteristics of each district .

This classifies each district on the basis of the predominant type or types of destination. A district may comprise several types depending on its size eg a large district with a resort plus a substantial rural hinterland would be classified as both resort and rural.

Fig 6.1 Predominant destination type by district

	Rural coast	Seaside resorts	Inland rural	Protected rural	Large towns	Small towns
East Devon						
Exeter						
Mid Devon						
North Devon						
Plymouth						
South Hams						
Teignbridge						
Torbay						
Torrige						
West Devon						
Caradon						
Carrick						
Kerrier						
N Cornwall						
Penwith						
Restormel						
Isles of Scilly						
Mendip						
Sedgemoor						
S Somerset						
Taunton Deane						
W Somerset						
Kennet						
N Wiltshire						
Salisbury						
Swindon						
W Wiltshire						
Cheltenham						
Cotswold						
Forest of Dean						
Gloucester						
Stroud						
Tewkesbury						
Bournemouth						
Christchurch						
E Dorset						
N Dorset						
Poole						
Purbeck						
W Dorset						
Weymouth						
Bath NE Som.						
Bristol						
N Somerset						
S Gloucs						

6.1 Inland countryside

Examples

Mid Devon, South Somerset, North Wiltshire.

Incidence

All parts of the region contain inland rural areas. The more individually distinctive areas are protected as National Parks and AONBs and are covered in section 6.2. However, most of the countryside in the South West outside the protected areas is also appealing to visitors, and the region is arguably more consistent in this respect than other regions of England.

Destination characteristics

Rural areas outside the NPs and AONBs tend to have lower lying but still rolling countryside. The landscape is dominated by agriculture, although a few areas have other leading land uses, notably woodland in the Forest of Dean. The whole relationship between the landscape, public access, agriculture and tourism is important across the region, within and outside protected areas. This was strongly demonstrated by Foot and Mouth Disease. Since the middle of the last century some of the rural attractiveness of the region, manifest by traditional agricultural practices, has been lost, especially in the east of the region, and could be further threatened by changes in agriculture.

Villages and small towns are extremely important to the rural economy and the visitor experience of these inland areas.

A characteristic of inland rural areas, which has an important influence on tourism performance, is their relationship to transit routes which cross them.

Image and appeal

Unlike some of the protected areas, these more general inland areas suffer from a lack of identity. Many are promoted around the brand name of the district in question. Our focus groups revealed a significant lack of awareness and image of the rural areas in the east of the region as tourist destinations and little association of them with the South West.

Compared with the protected areas and rural coast, which have more inherent natural appeal, other inland rural areas tend to rely on villages, towns and more specific individual visitor attractions and activities. Appeal rests with gentle exploration, car touring, and specific attractions and activities.

Tourism product

There are many significant visitor attractions in these areas which form existing and potential foci of visitor interest, such as historic houses, gardens, farm-based attractions and some theme parks. Inland water, such as the Cotswold Water Park and the reservoirs of Devon and Cornwall, also provide a focus of recreational activity.

Some areas have generated visitor interest through the designation and promotion of walking and cycling trails, such as in South Somerset and parts of Wiltshire.

Accommodation is dominated by small serviced (mainly B&B/gh) and self-catering accommodation, in towns and villages, on farms, on transit routes and elsewhere. Country house hotels and pub accommodation add to the diversity and are prevalent throughout the region. There are some examples of larger scale accommodation, including some inland holiday parks and Center Parcs at Longleat.

Business performance

Rural areas are important recipients of tourism in the South West. Around a quarter of all holiday trips (both long and short) in the region are to the countryside.

The small sample of hotels in rural areas in our business survey were doing better than the regional average, especially in the winter.

Rural bed and breakfast appears to be performing slightly under the regional average, but serviced farm accommodation is doing better than off-farm accommodation.

Self-catering performance, on and off farm, is close to the regional average.

Rural enterprises appear to be slightly less actively involved in improvements than those in towns or resorts.

There is more concern about the effect of local competition on enterprise performance in rural areas.

Labour supply is a particular problem for hotels in rural areas, exacerbated by issues of transport to work.

Markets

The main markets are short and extended breaks and visits to friends and relatives. However, long holidays are also important to enterprises in rural areas because of the high incidence of self-catering cottages in these areas.

Rural areas have relatively little appeal for families but are popular destinations for the post-family segment, especially for breaks.

Many activity holidays take place in rural areas, and they offer particular opportunities for the sizeable walking market and the growing cycling market.

Day visitors are particularly important for the viability of visitor attractions in rural areas, which in turn create part of the tourist appeal.

Issues and opportunities

Inland rural areas in the region are relatively low key destinations but offer further potential for breaks. Key issues include:

- Addressing supply and demand of accommodation and attractions, avoiding over supply
- Increasing performance of attractions as foci of interest
- Strengthening the supportive relationship between tourism and agriculture.
- Improving accessibility, for employees as well as visitors.
- Increasing definition and awareness of rural destinations.
- Making more of activity holiday opportunities.
- Strengthening local rural distinctiveness.
- Adding value to the rural economy through use of local produce etc.
- Engaging local communities.

6.2 Protected rural areas

Examples

Dartmoor National Park, Exmoor National Park, Cotswolds AONB, Quantock Hills AONB

Incidence

The region is extremely well off for protected areas, having 2 National Parks and 14 AONBs, which together make up 37% of the region's land area. These are to be found in every county. The Cotswolds is the largest individual AONB in England. In

the south and east a number of AONBs join together to form a continuous swath of fine, protected countryside from East Devon to West Wiltshire, encompassing most of rural Dorset. The Cornwall AONB is divided into areas around the coast and inland Bodmin Moor. Dartmoor and Exmoor form the main protected areas in Devon and Somerset.

Destination characteristics

There are five main characteristics of the region's protected areas:

- Sparsely populated moorlands, such as the centre of Dartmoor, parts of Exmoor, Bodmin Moor and Salisbury Plain
- Smaller individual uplands, such as the Mendips and Quantocks.
- Areas of rolling countryside, mainly agricultural, with woodland and important heritage features, such as the Cotswolds, Dorset and the fringes of Dartmoor.
- River valleys, including the Tamar and part of the Wye valley
- Fine coastal landscapes and the areas immediately inland from them.

Issues of the relationship between tourism, agriculture and landscape, as identified in 6.1, are particularly important in the protected areas.

The National Park Authorities in Dartmoor and Exmoor have been actively engaged in tourism issues for many years and both areas have tourism associations. Recent increase in the status of AONBs has led to greater recognition of their role with respect to sustainable development issues including tourism.

Image and appeal

Compared with more general inland areas, the appeal of the protected areas is clear and rests firmly with their landscapes. Consumer studies consistently underline the importance of fine countryside as a primary motivation for overseas and domestic tourism and destination choice. In most areas, the combination of attractive villages combined with natural beauty considerably strengthens the appeal.

The SW Brand Plotting exercise revealed that the two National Parks have, relatively, a very high awareness rating and reasonably strong interest levels. Amongst the AONBs, the Cotswolds has a strong image but the others probably far less so (in the Brand Plotting, the Mendips, for example, scored poorly).

Tourism product

As with rural areas in general, accommodation mainly consists of B&B, guesthouses, farmhouses, rural inns and small self-catering enterprises, principally holiday cottages.

Outdoor activities and public access for walking are especially important in the protected areas.

Business performance

The business survey did not separately identify properties in protected areas, partly because it was felt that enterprise owners may not be fully aware of AONB boundaries.

The general pattern of business performance is likely to be similar to that for rural areas as a whole (see 6.1). However, it is likely that overall levels of business will be greater owing to inherent appeal, greater awareness and the marketing activities of local associations.

Markets

Markets for protected areas are similar to those for rural areas as a whole (see 6.1). However, they offer relatively greater appeal for certain forms of activity holiday.

Issues and opportunities

There are a number of issues that are particularly important for protected areas in tourism, which reflect worldwide policies on this subject, and include:

- The extent to which these areas should be promoted as branded destinations in their own right, including overlap with local authority brands.
- Visitor and traffic management, including promotion of non-car access.
- Encouraging tourism enterprises to adopt environmentally responsible management, including green accreditation.
- Supporting conservation initiatives through tourism.
- Bringing more value to local communities through tourism.
- Promoting local produce, linked in turn to sustainable land management.

6.3 Seaside resorts

Examples

Torquay, Weymouth, Newquay, Swanage

Incidence

Something like a quarter of all districts within the SW contain a seaside resort. Many more contain smaller settlements along the coast which have a tourism function although may not class themselves as resorts.

Destination characteristics

There is no agreed definition of what constitutes a seaside resort. For our purposes, resorts are towns and cities on the coast which grew up and expanded to serve the needs of tourists and still have a substantial tourism infrastructure.

Seaside resorts vary in size from cities to quite small towns. Many have a significant resident population and some are important business and service centres in their own right serving a wide catchment, although this is necessarily restricted because of the coastal location.

Most resorts were substantially developed from the mid 19th to the early 20th century. Relatively little development and expansion has taken place since then and many resorts have problems with renewing outworn infrastructure.

They are essentially urban in character and can absorb, and are able to handle, large numbers of people.

Image and appeal

Resorts vary in image and positioning, from quiet and refined (Sidmouth) to more lively (Newquay). In general, resorts are offering an intensive, lively and busy experience geared to fun, entertainment and activities

Some resorts have a strong architectural feel with a coherent 'resort' style which has appeal. Resorts are good for people without cars as there are a lot of facilities within easy walking distance. Resorts traditionally grew around railway connections and many have retained these. Many are also flat, with appeal to the elderly or those with disabilities.

Resorts also perform a wider function with regard to holidaymakers staying outside the resort who come into the resort to make use of its facilities,

Tourism product

Resorts contain a significant amount of accommodation. This takes the form of serviced accommodation in hotels and guesthouses, primarily small, independent operations, as well as caravan and camp sites.

The accommodation is of mixed quality, much of it in older premises. There has been relatively little investment in new hotels although some of the budget chains have moved into the bigger resorts.

Encouragingly, the business survey revealed significant proportions of accommodation establishments (especially guest houses) in resorts which are undertaking improvements, more so than in other types of destination.

Strong emphasis on the seafront and beach with piers, formal gardens and promenades. Good range of entertainment facilities and events, with cinemas, theatres and amusements, funfairs, pubs, clubs and restaurants etc although some resorts are more lively than others.

Most resorts are surrounded by countryside within easy striking distance which can be seen as part of the overall package.

Some resorts have conference and exhibition facilities, usually based on a theatre or winter gardens complex.

Business performance

The volume of tourism has declined since the heyday of 1950s but despite gloomy prognostications many resorts continue to thrive and survive. 'Seaside' accounts for 44% of all holiday trips in the SW and 55% of 7+ holidays (2001). A significant proportion of this will be down to resorts. Also the top three districts in the SW in terms of staying and day visitors are all resorts.

Over the past 20 years the general trend has been downwards with shorter season, decreasing length of stay and low overall occupancies. It is possible that that may have bottomed out recently, with similar proportions of enterprises in resorts reporting modest growth in the past 5 years as in the rest of the region.

Seasonality remains a problem. The business survey revealed exceptionally high occupancies in August compared with all other types of destination, but average annual occupancies slightly below the regional average.

Markets

Resorts have particular appeal for family holidays and older people. Coach holidays are an important source of business for many. Having said this, the pre-family group (focus groups) showed more interest in resorts than most destinations because of the appeal of nightlife and entertainment. Bournemouth was mentioned in this context as was Newquay which because of the surfing scene is seen as a 'cool' place, attractive to young people.

Day visits are an important market for resorts, with some resorts attracting huge numbers.

Some resorts are still quite strong in the conference and exhibition market although facing increasing competition from better-resourced urban areas and losing market share.

A few resorts have developed niches such as language schools or activity holidays.

Issues and opportunities

Resorts still have much to offer. They provide robust environments, are places of fun and entertainment and provide wet weather attractions and essential services. The challenge is how to re-position and improve resorts to maintain their attractiveness and appeal.

Key issues are:

- Investing in infrastructure and the environment to improve and update their appeal.
- Diversifying the appeal, including activities, lifestyle and health markets
- Managing market contraction in some cases.
- Identifying areas where resorts have a market advantage.
- Improving accommodation quality.

6.4 Rural coast

Examples

North Cornwall, Penwith, Purbeck, South Hams

Incidence

Essentially, the whole of the region's coastline outside the resorts. Much of the more spectacular stretches, previously designated as Heritage Coast, lie within the AONBs. The recent designation of the East Devon and Dorset coast as a UNESCO World Heritage Site has raised its profile.

Destination characteristics

Extremely attractive coastal landscapes in Dorset, Devon and Cornwall of a world class quality. Fine beaches and smaller coves as well as cliff architecture and headlands affording extensive views.

Numerous small coastal towns and villages, some associated with fishing, providing a location for a range of accommodation, catering, shopping and attractions.

Some areas have seen extensive holiday park development in former times.

Less physically appealing coast along parts of the Bristol Channel, also the location of holiday parks.

Excellent access for walking provided by the South West Coast Path.

Image and appeal

Coastal scenery and fishing villages provide the quintessential images of Cornwall and to a lesser extent Devon and, by reflection, of the South West. Brand research suggests strong awareness and interest.

The focus groups suggest that the coast in Dorset is slightly less well known and people do not associate Somerset and the Avon area with coastline.

Some individual towns and villages have established their own image, e.g. Padstow, with its association with seafood.

Certain locations attract large numbers of day and staying visitors and provide management challenges (e.g. Lulworth Cove).

Tourism product

Wide range of accommodation both within towns and villages and in countryside locations along the coast, including B&B, self-catering apartments and rural cottages, small hotels (mainly family run, with relatively few corporate brands), and holiday parks. Some existing and new larger scale developments, eg Carlyon Bay.

A range of activity holidays and services on offer for the general tourist and activity segments, including boat trips, fishing trips, surfing etc. Some packaged walking opportunities on South West Coast Path. Walking and cycling trails linking coast and inland – eg Camel Trail, Tarka Trail.

Various locations have visitor and heritage centres. Craft and souvenir shops, and art galleries add to the range of small attractions.

Business performance

In the business survey, coastal hotels and B&B/guest houses outside the resorts were achieving slightly lower occupancies than resort-based properties. This was especially true of B&B/guest houses, where the main difference was a relatively lower level of occupancy in the high summer. Self-catering occupancy was similar in resorts and non-resort coastal areas, and equal to the regional average.

Markets

Coastal locations outside the main resorts have appeal for a wide range of markets, including pre-family break takers seeking activities, more affluent family holidays, and post-family holidays and breaks.

Long holidays (4+ nights) continue to be important here (business survey participants suggested it accounted for 40% of their business), but this may increasingly be extended breaks up to one week rather than traditional two week holidays.

Strong coastal images should provide appeal to the overseas market, though proportions of overseas visitors in these areas appear low.

Issues and opportunities

These areas are likely to provide long lasting appeal; they require careful promotion and management. Key issues include:

- Management of traffic congestion and car parking in certain locations.
- Careful development of access opportunities and walking programmes, partly linked to the coast path.
- Improvement of quality and performance of accommodation and attractions, in line with market expectations.
- Retention of character and local distinctiveness, including traditional historic appeal of fishing harbours etc.
- Sensitive promotion of marine activity holiday opportunities.

6.5 Large towns and cities

Examples

Bristol, Plymouth, Exeter, Bath, Bournemouth, Swindon, Cheltenham

Incidence

The South West has relatively few large towns and cities compared with other regions.

Destination characteristics

Many cities and larger towns have appeal as leisure destinations in their own right as well as being centres of business and providing a service base for the surrounding area.

Most would be expected to offer a range of hotels and other accommodation, visitor attractions, cultural and arts facilities and events programmes, restaurants and nightlife.

The inherent attractiveness and distinctiveness of towns and cities varies from place to place. With Bristol and Plymouth this centres on historic maritime connections. Bournemouth is a leading resort as well as a major urban area. Exeter is a cathedral

city. In Bath and Cheltenham, the appeal centres on ambience and fine buildings. Swindon is an important business and communications centre.

Image and appeal

There has been significant growth in the appeal of cities for short breaks both nationally and within the UK. In part, this has been built around nightlife and events, but a number of cities have developed significant attractions which help to generate the appeal. Shopping also serves as an important draw.

Bath has a high profile and awareness, domestically and internationally, as a heritage city. It scored strongly in the brand plotting exercise in terms of both awareness and interest.

The brand plotting revealed that the other cities have reasonable awareness (especially Bristol and Plymouth) but register lowly in terms of interest.

Tourism product

Quality hotels offering good value for money for weekend breaks are of major importance in city based tourism. In the main, these tend to be provided by larger corporate brands, but smaller 'town house' hotels offering character and style have emerged in some towns and cities.

Arts venues and conference facilities are an important part of the tourism product of towns and cities.

New or redeveloped attractions have been established in a number of the South West cities in the past five years.

Interesting shopping precincts and collections of high quality designer shops, together with café and restaurant quarters, are increasingly seen as part of the city tourism experience. Bath provides a good example of this, with a strong interrelationship between tourism and retailing in the city.

Business performance

Cities and large towns receive almost half of all the business tourism in the region and over a quarter of the v.f.r. visitors. Interestingly, 22% of short holidays in the South West occur in large towns and cities.

Average occupancy levels of hotels and B&B/guest houses in large towns and cities are considerably higher than in the region as a whole. This is largely due to far less seasonality, with good levels of business throughout the year.

Markets

Cities and large towns are major locations for the business and conference market and for v.f.r. They are particularly important as short break destinations for more affluent pre-family couples.

Nationally, the city breaks market has been growing.

Forecasts based on past trends suggest a stronger growth in day trips to towns and cities than to other types of destination. The local resident market is particularly important for the viability of services also enjoyed by visitors.

Issues and opportunities

Although there are relatively few large towns and cities in the South West, there are opportunities for further growth in terms of market trends and current levels of business.

Key issues include:

- Further development and promotion of attractions, arts and events.
- Marketing of special offers and packages.

- Maintenance of distinctiveness in heritage features, townscapes and also shops and restaurants.
- Seeking opportunities for further accommodation development in line with market demand.

6.6 Small towns and cities

Examples

Cirencester, Shaftsbury, Okehampton, Truro, Glastonbury, Bradford on Avon.

Incidence

The South West has a plentiful supply of attractive small towns throughout the whole region. In this category we also include the smaller cathedral cities such as Wells, Salisbury and Truro.

Destination characteristics

Small towns are often attractive places for visitors to spend time, providing a mixture of heritage interest, shopping and catering. They act as important service centres for visitors to rural and coastal areas.

Most small towns now have bypasses, improving their appeal as places to linger but also removing a certain amount of passing trade. Traffic and pedestrian signing, car parking and visitor orientation (including TICs) are important issues for small towns. Market towns are seen as generators of economic growth in rural areas, and as such have been the focus of support for sustainable development initiatives by the Countryside Agency and RDAs. Tourism plays an important part in most market town development projects.

Image and appeal

There is considerable variation in the inherent interest of individual towns. Arguably, the east of the region sees a higher concentration of towns with heritage appeal and intact old buildings. The small towns of the Cotswolds and parts of Wiltshire and Dorset are notable in this regard.

The maintenance of a heritage area in the core of small towns is particularly important to their appeal.

Markets provide an important feature of many small towns, including traditional street markets and newer farmers' markets. Livestock markets have considerable visitor appeal but have been declining.

Consumer awareness of individual small towns is likely to be limited and it is not cost effective for them to establish their own brand image – most relate to surrounding rural areas or sub-regions in terms of destination marketing.

Tourism product

Traditionally, most small towns will have a selection of pubs and inns, providing accommodation and meals. Many of these have been struggling to survive in the past twenty years and standards vary considerably; those investing in quality have fared much better. Some towns have seen recent development of lodge accommodation, usually on by-passes. B&B and guest houses are also important in the tourism product.

Visitor attractions in small towns are usually small in scale. Small museums and heritage centres, often volunteer run, are a typical feature of many small towns, often with low visitor numbers.

Many towns have developed town trails and walks into the surrounding countryside. Teashops and craft shops form an important part of the visitor experience.

Business performance

Small towns in the South West receive only 16% of short holidays and 11% of long holidays, but 28% of v.f.r. business.

The business survey found hotels and B&B/guest houses in small towns trading slightly above the regional average, achieving quite good levels of occupancy in the shoulder and winter months.

Markets

Markets for small towns are similar to those for rural areas. They have main appeal to the post-family segment. They are more likely to be of appeal for breaks than for longer holidays.

Local residents, v.f.r. and day visitors are important markets.

Issues and opportunities

It is important that small towns should retain their inherent appeal as well as acting as service centres. Key issues include:

- Heritage conservation and town centre management.
- Traffic management and visitor flows.
- Improving the appeal, quality and performance of traditional inns.
- Strengthening linkages between towns and surrounding rural areas
- Maintaining visitor information services.
- Improving the appeal and performance of museums and other small attractions.
- Maintaining markets and encouraging a range of interesting shops and eating places.