



TOWARDS 2015

SHAPING TOMORROW'S TOURISM

South West
England

FOREWORD: "TOWARDS 2015"

We believe this Strategy represents a huge opportunity for the South West. Tourism makes up 10% of our GDP and supports over 300,000 jobs, but 26 million staying visitors each year impose a heavy burden too. Can we increase the benefits while reducing the problems to manageable levels? That is the challenge we've tackled, head on.

We looked at tourism through the eyes of the visitors, those who work in the industry as owners as well as their employees and most importantly, the local communities. The visitors want to enjoy better quality each year, from service to food, to cleaner countryside and beaches. Local people also want to see improvements in the quality of their environment, and there is a real match between what the people who live in the region want and those who come to visit us.

More and more of our visitors also have very clear ideas of what they want to do with their valuable "downtime", and will go where they can do it and will be helped to do it, whether their interest is sitting on the beach, walking, surfing, or exploring beautiful gardens. They want effective, speedy information and support. So the websites, marketing campaigns, brochures, Tourist Information Centres and the Tourism Offices have to work smoothly together, in more cost effective ways. This means more genuine partnerships between the tourism businesses and local government at the destination, and better liaison with South West Tourism (SWT), the South West of England Regional Development Agency (SWRDA) and the other regional partners too.

The Strategy has detailed plans to achieve all of this.

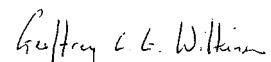
It also recognises that it is our natural and built environment which is, for most visitors, the single strongest draw. So we have turned vague talk about nurturing the environment into plans which, we are convinced, will make a real difference on the ground.

This is a big and important agenda, and one which supports many of the other priorities of the region including helping rural regeneration - notably by promoting local food and drink - offering opportunities to improve health and fitness, and backing those with cultural and sporting interests. This Strategy is backed enthusiastically by the South West of England Regional Development Agency, whose primary objective is to improve the economic prosperity of the region and by South West Tourism, whose role is to facilitate the implementation of the Strategy. But this is a Strategy for the entire region. South West Tourism will be working with Local Authorities and other partners to achieve the first ever integrated delivery at regional, sub-regional, and local level. By working together at all three levels we can make the South West more prosperous and successful. As well as a role model recognised everywhere for responsible tourism development and management, we can make the most of the work being undertaken at a national level by Visit Britain.

12 January 2005



Francis Cornish,
Chairman, South West Tourism



Geoffrey Wilkinson,
Chief Executive, SWRDA

EXECUTIVE SUMMARY

THE FUTURE – YOU DECIDE

Tourism is worth more than £8 billion annually to the South West economy – that's 26 million visitors bringing employment for over 300,000 people. The bald statistics make impressive reading and in the coming years analysts predict those numbers will continue to rise. But what they also predict is that without careful management and direction, such growth could threaten the long-term stability of the industry itself:

- while there will be more new jobs, they would be seasonal and of low quality;
- while there will be more new visitors, they would be in parts of the region and at times of the year which are already at capacity; and
- where now the local community supports tourism, increased traffic and damage to the environment would cause growing feelings of alienation.

Today, the challenge is to ensure that does not happen – to shape the future. It is with this aim that over the last two years South West Tourism and the South West of England Regional Development Agency have come together to carry out a comprehensive review on behalf of the region. Working with specialists, partners and tourism businesses they have developed a new and radical strategy with which the South West can face the challenges of the coming decade and beyond.

Called Towards 2015, the strategy will use the South West's existing strengths as the foundation stones on which to build an enduring edge over domestic and international tourism competitors.

Towards 2015 is not just a strategic framework; it will drive the creation of detailed annual and three year delivery plans – bringing leadership and direction to the development of a truly sustainable, valuable tourism industry for the South West. It is vital to stress that this is a strategy for the whole region, its industry and all those organisations that support this key economic driver.

By adopting this new strategic approach tourism will:

- protect the environment;
- improve the quality of life of local people;
- take advantage of the region's existing strengths; and
- create a long-term and sustainable industry.

And, of course, the region will also benefit financially. Experts estimate that the annual income from tourism could potentially increase by £1.2 billion.

TOURISM TODAY AND TOMORROW – MEETING THE CUSTOMERS' NEEDS

The cornerstone of Towards 2015 is the focus it places on anticipating and then exceeding customers' needs. Rather than just sticking to the traditional approach of promoting individual destinations – a seaside resort or city – the emphasis will be on complementing destination marketing through developing and promoting high quality 'customer experiences'. This shift in focus is a reflection of the fact that today's customers increasingly choose their holiday according to the experience they want rather than its location. For example, our customers are now more likely to decide they want a 'weekend of sheer indulgence' or an 'adventure activity break'. Only once they have decided the type of experience that they want do they choose the location – according to which best caters for their needs. In South West England we are in a great position to take advantage of this trend as so many of our strengths and natural assets can help deliver world-beating experiences.

The South West is the premium tourism region in the UK, with premier destinations and experiences. We need to promote these destinations and experiences more effectively.

STRENGTH THROUGH UNITY – THE BRAND CLUSTERS

To capitalise on this, Towards 2015 will concentrate on the development and promotion of what are known as 'Brand Clusters'. These clusters define the sort of holiday our customers want in terms of the experience they are looking for. For example, there is the 'sheer indulgence' cluster which is characterised by fine dining, pampering, treats, luxury and celebration. Then, there is the 'close to nature' cluster which trades on the 'wow' factor of the South West's uniquely diverse landscape, the fresh air, the wildlife and the stunning views.

By focussing on these experiences, Towards 2015 will bring relevant businesses and organisations together across the region to build and shape their particular cluster. This will happen in many ways – through shared market intelligence, identification and development of new initiatives to drive up quality, shared promotion and collaboration on product development and opportunities facing the cluster. Brand Clusters will bring together not only mainstream tourism businesses, but also those from the food and drink, retail and activity sectors.

Development of the Brand Clusters will be led by a new 'Brand' team within South West Tourism, whose role will be to engage with industry and coordinate a package of product development, research, business support, skills, quality enhancement and promotion appropriate to the needs of each cluster and its customers.

TIGHTENING THE FOCUS - DESTINATION MANAGEMENT ORGANISATIONS

Today in the South West, the responsibility for delivering what visitors want is divided amongst many organisations – county, district and local area tourism organisations, marketing bureaux and tourism associations. The result is a degree of overlap and waste, at a time when Local Authority budgets are, and likely to remain, under increasing pressure.

Towards 2015 envisages the creation of a leaner, more cost-effective and efficient structure across the region, with bodies working together more closely under the umbrella of Destination Management Organisations (DMOs) which will merge and streamline many of the activities currently undertaken by individual organisations. The DMO activities will include building development strategies for destinations, providing a point of contact and support for the private sector at sub-regional level, marketing, research, and providing ICT and e-tourism services. Marketing activity will be focused on key destination “attack brands” – those destination brands that are recognised by potential visitors and have the greatest potential for generating a response, enquiries and bookings from non-visitors and long lapsed visitors. There will be complementary strategies and plans to retain existing customers and recent lapsed customers.

This will be a fresh approach to tourism in the South West, leading to a substantial realignment of structures at a sub-regional level. To undertake the promotion of these principles, South West Tourism will create a team of specialists in destination management and sustainable tourism, under a Head of Partnerships, whose specific role will be to encourage and facilitate the development of DMOs throughout the region, assist in the creation of customised business models, and ensure liaison between Local Authorities, industry bodies, key partners and relevant regional support agencies.

SUSTAINABILITY AND QUALITY – THE ONLY WAY FORWARD

Towards 2015 puts a new and sorely-needed emphasis on sustainability in all its forms. By placing this at the heart of the strategy, it is anticipated that within a decade South West England will be recognised as a model tourism destination. It will be defined by the unique balance achieved between its communities, its tourism industry, the natural environment and its customers – so achieving long-term economic, environmental and social benefits for the region. Towards 2015 also breaks with traditional tourism strategies in its prioritisation of quality over quantity. Again, it’s all about sustainability. We want to:

- grow the value of visitors to the region rather than just the volume of visitors;
- create quality jobs with career progression and prospects - not just quantity jobs;
- unite businesses into Brand Clusters and destinations to enable them to exceed customer expectations;
- move the industry into a new era of technology-supported customer relations marketing;
- include local people in key decisions about the future of tourism in the South West;
- protect the natural and built environment;
- be responsible for, and work to alleviate, the environmental and social impact of tourism; and
- provide a focus and unity within the industry.

If these aims are achieved, Towards 2015 will dramatically change the South West’s tourism industry. Together, we can make it happen.

A REGIONAL CENTRE FOR TOURISM EXPERTISE

Underpinning and supporting the Brand Clusters, DMOs and the development of sustainability and quality will be a realigned structure within South West Tourism, charged with offering to partners the skills and services needed to deliver Towards 2015.

In addition to the brand and destination management support teams, units within the ‘new SWT’ will cover marketing, product data and information, quality development, sustainable tourism, research and intelligence, e-tourism and information, skills and business support.

TOWARDS 2015

INTRODUCTION

This document details the vision for tourism in the region combined with the key issues and priorities for action. It should be read in conjunction with the annual delivery plans for each Brand Cluster and Destination Management Organisation.

THE CASE FOR CHANGE

The tourism industry has been identified as one of the most important sectors for the economic future of the South West. While it already plays an important role in expenditure and employment terms, historically it is an under-performer when compared with other sectors. With analysts predicting that visitor numbers are set to grow over the coming decade, it all means that tourism has the potential to deliver significant economic benefits in the future if the right approach is adopted now. In order to do that, the strategy contained within Towards 2015 was developed by first understanding the changing face of tourism and then by conducting an audit of South West England's existing tourism industry.

Future trends identified included potential for:

- up to 20% growth in domestic tourism spend, with almost all this growth in the desirable off-peak and off-season periods;
- up to 19% growth in overseas tourism spend of which a suggested 10% increase is achievable and sustainable for the region;
- a further 20% growth in spend by day visitors and those visiting friends and relatives;
- increased numbers of older travellers – who will in general be healthier and have more money to spend;
- increased interest in holidays which promote good health and well-being;
- more holidays in which arts, culture and history play a prominent role;
- continued increase in use of the internet for finding out about and booking holidays;
- more demand for destinations which preserve and promote their natural assets because of increasing concern for the environment;
- a continuing trend for shorter holidays because of increasing pressure in people's daily lives;
- combining holidays with hobbies and interests, as people seek expression of individuality;
- increasingly discerning customers who expect and demand quality and value;
- increasing numbers of visitors looking for authentic experiences which provide a flavour of regional culture, traditions and history; and
- increased competition from new international entrants to tourism e.g. Croatia and Libya as well as established competitors such as Egypt and France.

This appreciation of the future was coupled with an understanding of the 'now' – the product of a year-long, industry-wide process of reviews, intelligence-gathering operations and consultations. This included:

- review of economic impact of tourism in the South West;
- market intelligence on present and projected consumer demands;
- competitor analysis;
- community attitudes survey;
- tourism market segmentation workshops and analysis; and
- an employee satisfaction pilot study.

It was against this background that the draft Towards 2015 strategy was formulated, after which a formal consultation process was undertaken involving the public, private, community and voluntary sectors. Towards 2015 received a high level of support with overall agreement on all the main issues and priorities, but there were some concerns raised, namely:

- the need to develop both experience (Brand Clusters) and strong destinations simultaneously;
- the need to differentiate destination marketing from destination management and to ensure both are undertaken effectively;
- the need for 'nesting' marketing strategies – ones that complement each other rather than duplicate – especially for new business generation;
- the need for Brand Clusters to be developed carefully by working closely with the industry and destinations; and
- the need for regional leadership and co-ordination in the implementation of e-tourism.

These and many more issues will be built into the detailed annual delivery plans (contained in the wallet at the end of this document).

THE VISION

'By 2015, the South West of England will be internationally recognised as a model tourism destination. This will be achieved by creating a unique balance between its environment, communities, industry and visitor satisfaction, while earning long-term economic, environmental and social benefit for the whole region.'

A UNIQUE APPROACH – THE AIMS OF TOWARDS 2015

While seeking to maintain existing sustainable markets, Towards 2015 aims to pursue those markets identified as having the greatest potential for growth and for attracting new, higher-spending visitors, especially those staying outside the main season and across the region.

Three key strategic aims have been identified that will form the focal point for future action.

1. Driving up Quality

South West England is not, and does not want to become, a 'cheap' destination. By driving up quality and the competitiveness of businesses in the region, we will increase value and respond to the changing demands of our existing and new visitors.

While quality is, of course, a subjective term, we must always be focussed on giving customers more than they expect. Overall visitor satisfaction is based on the total experience and it is only through delivering quality across ALL aspects of the holiday experience that we can satisfy our visitors, keep our businesses competitive and continue to be a leading UK destination.



With this in mind, the emphasis will be to grow the value of visitors to the region rather than just the volume of visitors. In so doing, this will allow us to increase investment without degrading the assets which make our region special and help ensure the long-term future of the industry.

To drive up quality, we will encourage businesses across the region to work together to exceed customer expectations. We will also move the industry into a new era of customer relations and service, taking full advantage of the rapidly expanding communications technology. In this way, not only will we maximise the value of each visit but at the same time deliver higher value repeat customers. Delivering enhanced quality is a huge task and not one that can be achieved simultaneously across all sectors.

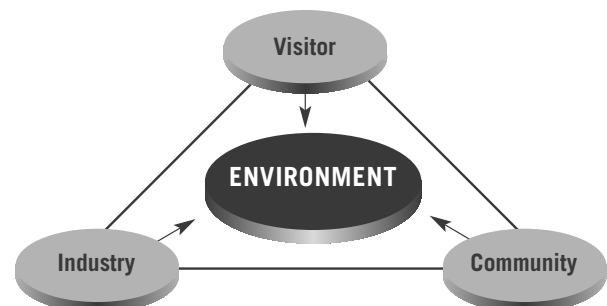
A key first step is therefore to increase participation significantly by all relevant businesses in the National Quality Assurance schemes run by the AA, RAC and VisitBritain. In parallel to this 'sectoral' approach, the brand teams will liaise with industry participants to identify and address the quality aspirations of each consumer audience, whilst DMOs will be supported in benchmarking their destinations and taking the necessary steps towards excellence.

Equally, through the Brand Cluster and DMO teams, we will also work to ensure that tourism brings quality jobs to the region rather than sheer number. With relatively low unemployment, the emphasis in future will be on enhancing the quality of existing jobs and creating opportunities within the labour market that offer prospects for those who wish to have tourism as a life-long career rather than just a job.

2. Delivering Truly Sustainable Tourism

In order that tourism can continue to be a key sector of the South West England economy for decades to come, it is essential that we deliver truly sustainable tourism.

Sustainable tourism is about the interaction between the needs of the visitor, industry, community and environment. If tourism is to remain a leading industry for the region for the long-term it is vital that we preserve our assets – a principle that must apply across the whole of the industry. In particular, we must recognise that the single most important driver for our visitors is the landscape, the coastline; the natural environment. A key part of delivering sustainability is ensuring that local people are involved in key decisions about the investment and the regulation of tourism at every level. This will be a key element within the business models of the emerging DMOs as well as each of the Brand Clusters.



3. Creating Superior Destination Management Arrangements

For the strategy to be truly effective, it is essential that we rationalise the wide variety of methods and structures involved in supporting and promoting our tourism destinations, thus enabling professional destination management and targeted marketing. The visitor experience is ultimately delivered at 'destination level' and it is on this experience that visitors base their decisions on whether or not they will return.

Achieving the region's aspirations for quality and sustainable tourism can only be realised through destinations being effectively managed. In turn, destination management will only succeed by translating quality and sustainability into practice through a single coherent approach and a long-term plan that addresses both of these priorities. Implementation of this plan will involve a multitude of partners, each with an essential role in delivering distinct elements of the tourism experience. Such partners include

- Local Authorities
- Private Sector
- Local Communities
- Environmental Agencies
- Education and Training Providers

All have an essential role in the effective management of tourism, which if neglected, could have a seriously damaging impact on the destination concerned.

To be truly effective, the three aims of Towards 2015 must dovetail providing an integrated, well-managed way ahead for the next decade.

In developing the new destination management structures it is essential that we achieve three key balanced relationships; namely the new structure must:

- engage the industry;
- enhance and maintain engagement with Local Authorities and partners; and
- ensure economies of scale to secure skilled staff and adequate resources

WHAT ARE WE TRYING TO ACHIEVE?

By doing this, we intend to create an industry which:

- is markedly less seasonal;
- achieves higher visitor satisfaction rates;
- is able to command a premium price over competing products in other regions;
- is welcomed by the host communities;
- recognises the environmental impact caused by the industry, ensuring that it does significantly more to protect and enhance the environment;
- is a better employer with employees satisfied with their conditions of employment, training and career development;

- is supported by effective tourism management arrangements at regional and destination level with no duplication or waste of resources;
- creates growth in quality employment;
- enhances existing jobs; and
- generates additional sustainable income into the regional economy

TOWARDS 2015 – ENABLERS AND DELIVERY MECHANISMS

Towards 2015 is an integrated approach to tourism management and development, involving sustainability, quality development, competitiveness/productivity improvement and skills enhancement, in addition to promotion and marketing.

Fulfilment of Towards 2015 will essentially require:

- Agreement by all major partners on two key **ENABLERS** - agreements that are essential to the implementation of the strategy, and
- the creation and development of the two essential **DELIVERY MECHANISMS** – the operational structures that make delivery of Towards 2015 possible. (ie Brand Clusters and DMOs)

THE ENABLERS:

Effective agreement by all the key parties will be essential to ensure a fast start to delivering Towards 2015. The two key enablers are;

1. Destination Brand Architecture

Agreed brand architecture and integrated marketing strategies for the region's destination brands – those that are recognised by consumers and have the potential to achieve critical mass in consumer marketing.

It is only by having an agreed destination brand architecture and support plans that we can maximise the economic potential of our shared marketing activities.

2. E-tourism and Business Models

Agree a shared/compatible Information Communications Technology (ICT) approach and integrated communications strategy to both the industry and partners, based on common/compatible "business models" at regional, destination and local level.

The collection, enrichment and distribution of information and content are vital to tourism promotion and management, and in turn to the generation of enquiries and bookings.

The current disparate and non-compatible systems are a major barrier to effective tourism promotion. A common region-wide approach is critical to the improvement of promotion and fulfilment of enquiries.

DELIVERY MECHANISMS:

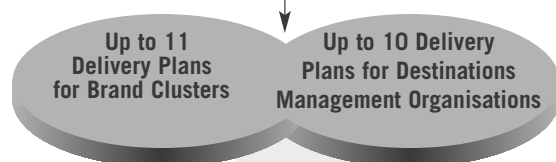
Putting the new strategy into operation will start with the creation and development of the Brand Clusters and the new/revised Destination Management Organisation arrangements, both supported by SWT's realigned support structure. Only by working closely together can we achieve the goals we seek.

Shared/Compatible ICT, Communications and Business Models

Agreed Brand Architecture & Marketing Strategies For New Business Generation

Circa 20 Detailed Towards 2015 Implementation and Delivery Plans

Sustainability and Quality Development through



1. The Brand Clusters

Increasingly, and especially for short breaks and first-time visitors, people are less interested in a destination for its own sake and more interested in the experience they are likely to have. By identifying specific experience-types it is possible to bring together like-minded businesses across the region and then to market them as part of a single theme. The Brand Clusters will involve a group of businesses relevant to a particular experience - i.e. accommodation, attractions, entertainment, food and drink and retail. What is common to each will be the sort of experience or activity the visitor wishes to enjoy.

What is essential to each cluster is that the experience exceeds visitor expectations, hence a key element of the Brand Cluster plans is for product development requirements to be identified and addressed, for quality and skills to be raised in line with consumer aspirations and for the delivery of sustainable tourism.

Research has identified the following Brand Clusters as having greatest potential for the region:

Sheer Indulgence; it's all about luxuriating in the best the South West has to offer – top class hotels, outstanding cuisine, impeccable service – either to celebrate a special occasion or just as a treat. There's fine dining brought to the customer by leading chefs, featuring the best of the region's food and drink. And for the soul there's pampering, spa treatments and the opportunity to put yourself first.

Close to Nature; lose yourself without getting lost. Experience the 'wow' factor courtesy of the region's unrivalled natural assets – from moorland turf to crashing surf. For this customer it's all about fresh air, wildlife and stunning views, with accommodation and food that speak of the region.

Traditional Beach Holiday; where, but where else, would you go? With its world-class beaches and stunning coastline, South West England has a beach holiday to match everyone's dreams. Mix in the wide range of modern-day leisure attractions and activities, as well as cream teas and other old favourites, and it's easy to see why the region's such a hit with families.

It's Adventure; have some high-adrenaline fun in the nation's playground. Be it on land or sea, there are cutting-edge adventures to be had in South West England. With well-managed experiences available to people of all ages and capabilities, just pick a challenge and then test your limits and enjoy the thrill.

Discovery; you're never too young, or old, to learn something new. With an endless choice of activities and courses – cookery, painting, yoga, creative writing or even dry stone walling to choose from – discover new experiences in inspiring settings. Develop new skills or rediscover old ones, learning through hands-on experience.

Romance; get away from it all with the one you love. Weddings, honeymoons, anniversaries or a special break away, let South West England provide the backdrop to your memories.

Living Heritage; discover a unique historical legacy. From King Arthur to Daphne du Maurier, South West England has something for everyone. With its diverse cultures and traditions, its castles, houses, gardens and monuments, there's history and heritage in every city, in every port and at the end of every winding lane.

Easy Pre-School; it's the hassle-free holiday for families with small children. Over decades, South West England has fully geared itself up to cater for customers with pre-school children – with tailor-made accommodation and facilities. At the same time, parents wanting a well-earned break from their offspring can also enjoy a real holiday, thanks to well-regulated children's clubs and nanny services.

It's Cool!; young, free and out for a good time! South West England has a reputation as the cool place to be, with its surf scene, festivals and night life. And, of course, vibrant towns and cities where you can experience the best of urban culture by day and clubbing by night. For these customers, it's about experiencing a different vibe and living life to the full!

Relax and Recharge; take a walk on the quiet side. For those in need of an antidote to stress, then South West England offers a fast fix. Escape the rat race, unwind, refresh and relax with quality time for yourself and your friends.

Business Tourism; where better for your business trip, whether a meeting, conference or team building event with staff or clients. Maybe with some distinctly South West adventure and activities included - in a region that's more accessible to the business community than ever before.

Brand clusters – open for business.

A wide range of businesses and organisations will be represented within each cluster: accommodation, destinations, attractions, retail, restaurants, specialist activity providers and so on. Businesses wishing to participate in Brand Clusters will sign up to a 'quality charter'. In return they will have access to a wide range of added benefits, including:

- targeted marketing and promotion;
- regular market intelligence updates related to each cluster;
- access to advice on quality development and schemes;
- benchmarking and networking across the group;
- business support from experts in relevant fields;
- skills development appropriate to cluster needs; and
- centralised lobbying on key issues.

Brand Cluster Development Phases

Development of the Brand Clusters will be led by new 'Brand' teams within South West Tourism, whose role will be to engage with industry and co-ordinate a package of product development, research, business support, skills, quality enhancement and promotion appropriate to the needs of each cluster.

For each cluster an advisory panel will be formed, with representation from relevant industry and destination partners. These panels will help develop the vision and define the criteria requirements for entry into the cluster; they will also give guidance on the appropriate number of businesses and partners required to develop cluster activity.

The development of each Brand Cluster will follow broadly similar lines: from initial concept through to development into a co-ordinated marketing campaign leading to public launch and further related product development. Each cluster will have its own website, which will form the main core of marketing activity, promoted through a variety of targeted campaigns. Brand Clusters will be further supported by the region's national image-building campaign.



2. Destination Management Organisations (DMOs)

At a sub-regional level, South West England's tourism industry is currently co-ordinated by county and district-wide tourist boards, marketing bureaux and tourism associations which are mainly, partly, or wholly funded by Local Authorities. Local Authorities are essential partners in the delivery of the vision of a successful, quality-led tourism industry. Towards 2015 envisages the creation of a leaner, more cost-effective and efficient structure across the region, with these bodies working together more closely under the umbrella of Destination Management Organisations, with many of the activities currently undertaken by individual bodies merged and streamlined.

These activities will include:

- leading on the development of action plans for the destination area;
- acting as the primary point of contact for the private sector at a sub-regional level;
- providing ICT and e-tourism services;
- providing information through Tourist Information Centres (TICs) and other distribution routes to visitors and residents;
- marketing the destination;
- carrying out or commissioning research;
- providing advice and support to business; and
- ensuring engagement with local partners and organisations.

To co-ordinate these activities, South West Tourism will create a team of specialists in destination management and sustainable tourism under a Head of Partnerships, whose specific role will be to encourage and facilitate the development of DMOs throughout the region, assist in the creation of customised business models, and ensure liaison between Local Authorities, industry bodies, key partners and relevant regional support agencies.

The DMO approach seeks to ensure the effective, co-ordinated management of the region and the destinations, so that we can provide the highest quality experience to our visitors.



TOURISM DEVELOPMENT



No one organisation does or can deliver "tourism development" it must be a team game at national, regional, sub regional/destination and local levels. It is vital that strategies at all four levels "nest" and support the overall goals in Towards 2015 and that there are detailed annual delivery plans at:-

- **Regional**
led by SWT but involving other regional partners eg SWRDA, Tourism Skills Network.
- **Sub Regional/Destination**
led by DMO but including other destination partners eg Local Authorities.
- **Local**
led by Local Authorities working closely with DMOs and including other local partners.

A REGIONAL CENTRE FOR TOURISM EXPERTISE

Underpinning and supporting the Brand Clusters, DMOs and the development of Sustainability and Quality will be a realigned support structure within South West Tourism, charged with offering to DMO partners and brand teams the skills and services needed to deliver Towards 2015.

Units within the 'new SWT' will cover marketing, product data and information, advice and development of quality, research and intelligence, e-tourism, skills and business support.

These generic support teams will work closely with the DMO, sustainable tourism and Brand Cluster teams, as well as DMOs and appropriate partners, towards the delivery of Towards 2015.

AREAS OF ACTIVITY AND SUPPORT

For each of the two Delivery Mechanisms - Brand Clusters and DMOs - a set of detailed delivery plans will be produced to cover the following six areas of activity:

- quality improvement,
- sustainable tourism,
- e-tourism and information,
- skills development,
- business support services,
- improve market intelligence,
- regional marketing and promotion

Outlines of the kinds of activity to support the plans are covered in the New Tourism Support Structure, see diagram on page 12.

QUALITY IMPROVEMENT

Given the high cost base of operating a tourism business in the UK we can only be successful against the ever growing and aggressive competition from outside the region by competing on quality. Therefore we need to drive up quality to remain competitive and capture new business. Quality development must be at the heart of the delivery plans for each DMO and Brand Cluster. These plans should include ambitious but realistic improvement on quality of:-

Not only,

- Customer service
- Accommodation
- Food and drink
- Attractions
- Visitor services and information

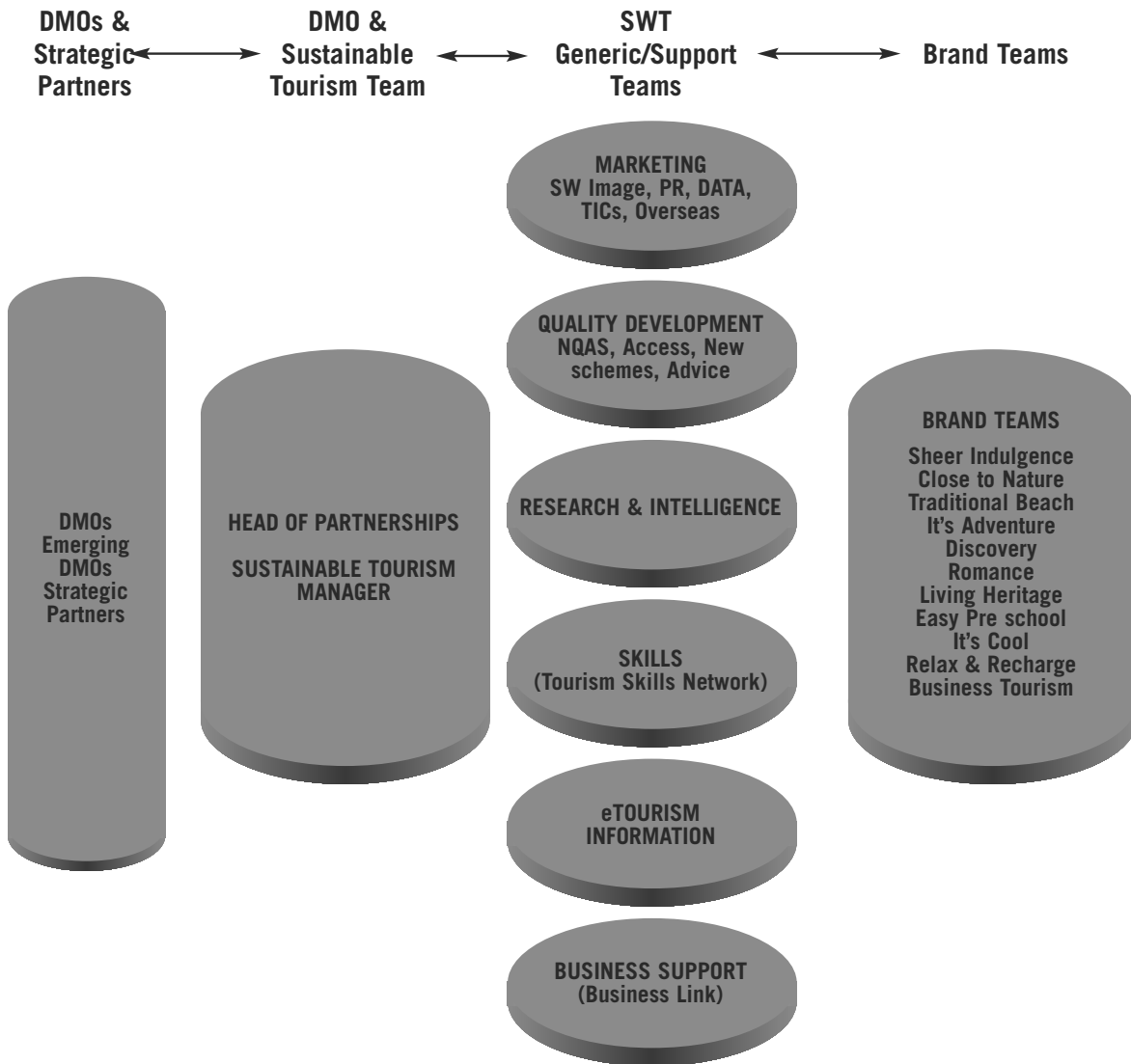
But also,

- Public realm
- Retail
- Travel and transport
- Business operations and management



NEW TOURISM SUPPORT STRUCTURE

The new regional centre for tourism expertise, comprising generic teams that underpin both of Towards 2015's delivery mechanisms - the brand teams to the right and the DMO / sustainable tourism teams to the left.



SUSTAINABLE TOURISM

Our goal is a sustainable tourism sector in which the impact of visitors on the environment and on local communities is properly managed and adverse effects minimised, while also ensuring long-term viability, with investment as far as possible aiming to keep tourism spend in the local community. Sustainable tourism satisfies visitors, business and local communities, without damaging the environment now or for the future.

Sustainable tourism principles need to be built into all existing and new tourism product development and into Brand Cluster and destination management delivery plans. Sustainable development seeks to integrate the environmental, social and economic elements of tourism into a mutually supportive approach.

'Towards 2015' recommends following and developing the seven steps of the "Future Footprints" programme of Sustainability South West:

- Buy local
- Support quality
- Use resources wisely
- Respect distinctiveness
- Offer car-free access
- Get local involvement
- Explain the sustainability message!!

A bi-annual review will evaluate sustainability progress, after first establishing baseline data on the net value of tourism, the impact on the environment and host communities, overall levels of visitor satisfaction and industry performance.

Steps to increase the understanding of sustainability issues and encourage action by the key decision makers in tourism across the region will include:

- building on the existing regional and sub regional sustainable tourism groups and initiatives to form a 'South West Sustainable Tourism Forum' to champion the development and implementation of consistent good practice at regional and destination level;
- introducing a sustainable tourism technical appraisal service so that development and planning decisions can be assisted by professional evaluation on sustainability;
- introducing a sustainable tourism charter and accreditation standards for businesses which will build on the successful pilot work already conducted in the region including, for example, the Green Tourism Business Scheme in the South Hams; and
- increasing activities to promote further development of local purchasing and supply chain development.

E-TOURISM & INFORMATION

'Towards 2015' aims to improve customer access to the quality and range of information about the region and its destinations and enable customers to source information and book holidays on-line. This will be achieved by:

- ensuring DMOs are covered by a destination management system (DMS), which is compatible with EnglandNet standards and links with other DMOs across the region;
- ensuring Brand Clusters offer comprehensive information relevant to the consumers each targets, with accommodation bookable via appropriate DMSs;
- increasing the quality and extent of rich content (motivational images, ideas for visits, etc) on the regional network of DMSs, especially general tourism information on the region and content that will inspire new visitors to visit;
- encouraging small/medium sized businesses to engage in e-tourism through communicating the benefits and developing skills (including promoting awareness of the potential offered by Broadband);
- improving the provision of information and online booking facilities to consumers, aiming to make booking a holiday at a small business in the region as easy as possible;
- developing and launching a structure of websites, with effective promotion, reflecting messages appropriate to each Brand Cluster and each major destination within a regional design theme; and
- reviewing the present arrangements and piloting new provision of visitor information via contact centres, signage, franchised outlets, mobile telephony and TICs and developing an approach based on the current and future needs of the region's visitors.

SKILLS DEVELOPMENT.

We need to bring the very highest levels of skill and expertise into our tourism industry and the people that work in it, to ensure that we have a committed, motivated and professional work force. Improving the skills levels of people working within the industry will become a major priority for 'Towards 2015'.

We will recognise that the more successful we are in extending the visitor season, the easier it will be for employers to offer long-term jobs; and the easier it will then be to encourage them to provide high quality training.

The Tourism Skills Network (TSN) delivery approach will be realigned to support the DMO and Brand Cluster structure, encouraging a step change in the delivery of training for the tourism sector.

This will include:

- more relevant training available in the workplace; more training available over the Internet; and more flexible training, tailored to meet specific business needs and delivered at convenient times for businesses;
- improving skills levels amongst owners, managers, trained staff (especially chefs) and employees, reflecting consumer demands;
- identifying specific skills and business support needs, developing and implementing solutions appropriate to each Brand Cluster and DMO; and
- developing further centres of excellence for tourism training and Continuous Professional Development (CPD) e.g. hotel school, training in the use of local food and drink, chef academies and sustainable tourism centres.

BUSINESS SUPPORT SERVICES

'Towards 2015' aims to develop and tailor support services to help build quality businesses and improve their competitiveness and productivity by:

- encouraging the identification of common business support needs through DMOs and Brand Clusters;
- working with partners to introduce a three-tier service created especially to cater for tourism businesses, offered through web and telephone-based information and support, tourism workshops, specific advice and via individual coaching and mentoring;
- increasing the role of South West Tourism and DMOs in promoting skills training and business support; and
- establishing programmes for business benchmarking and best practice evaluation.

IMPROVE MARKET INTELLIGENCE

By improving market intelligence, a greater understanding will be reached of South West tourism markets, visitors and the overall economic situation, helping us to raise business competitiveness. An annual regional research plan will provide detailed information on trends, attitudes, opportunities and other issues affecting inbound tourism as well as discrete strategic projects that will inform the implementation of Towards 2015.

The Brand Clusters and DMOs will identify research and intelligence needs, with members sharing market intelligence, commissioning joint market research and forecasts of changing demands in order to increase competitiveness.

REGIONAL MARKETING AND PROMOTION

In support of the Brand Cluster and DMO campaigns, the profile of South West England as a high quality, distinctive region will continue to be promoted through a national advertising and PR campaign. This will develop the South West brand, and the South West as a major destination for holidays, business and inward investment.

A SNAPSHOT OF WHAT TOURISM IN SOUTH WEST ENGLAND COULD LOOK LIKE IN 2015

With all partners contributing to this approach, tourism in South West England in 2015 will be significantly different from today - as highlighted below:

- It will be radically less seasonal. The value of tourism generated in off-peak and off-season would increase by 40%, with a managed reduction of volume in the peak periods, where appropriate and desired.
- It will be of higher quality. The industry would have more competitive businesses with higher productivity than any similar region.
- There will be an improved all-round experience. Visitor satisfaction rates would be over 85% and there would be high levels of repeat business.
- It will be able to command a 15% premium price over relevant competition.
- There will be even more support for the industry across the region. At least 90% of people within the host communities would accept and support tourism.
- Tourism will be a key driver in protecting and enhancing the environment.
- The industry will be a better employer. 75% employed would be satisfied with their conditions of employment, training and, if appropriate, career development.
- There will be effective tourism management arrangements at both regional and destination level with duplication avoided.
- Tourism will be creating jobs. The strategy would lead to the creation of a further 5% growth in employment.
- Existing jobs will be better. At least 30% of existing jobs would be enriched in some way.
- The industry will be a major wealth creator for South West England. The industry would generate a sustainable increase of at least £1.25 billion per annum for the regional economy by 2015.

HOW WILL WE KNOW WE ARE GETTING THERE

It is vital that any strategy and the associated delivery plans have effective monitoring to ensure delivery and evaluation and to ascertain that the original goals for the strategy are being achieved. Individual organisations including South West Tourism and its brand managers, the South West of England Regional Development Agency (SWRDA), Destination Management Organisations, Local Authorities and their partners will have an obligation to monitor and evaluate individual projects, activities and programmes.

The overall responsibility for overseeing the monitoring and evaluation of progress towards achieving the vision and targets will rest with the Board of Directors of South West Tourism, who will in turn report to the South West RDA, the industry and partners.

Although monitoring each project is important, it is vital that we do not lose sight of the overall reason for undertaking such a wide-ranging portfolio of action – the delivery of the vision in Towards 2015.

Key evaluation studies are likely to include the following assessments.

Annual reviews

- Seasonality profile of tourism: how we are progressing out-of-season development.
- Quality report on the industry: are we achieving our goals of driving up quality?
- Progress on sustainability, especially environmental activities: how have we protected the environment?
- Destination management report: are the new arrangements working effectively?
- Brand Cluster monitoring: how successful are each of the clusters being in achieving Towards 2015 aims?

Bi-annual reviews

- Employment satisfaction results: are we achieving our aim of 75% employee satisfaction?
- Customer satisfaction results: have we achieved 85% of customer satisfaction?
- Employment enhancement study and report – to what extent have we enhanced and improved quality of employment?
- Competitor analysis and price comparison analysis – to ensure we are delivering the value and volume objective.

Tri-annual reviews

- Community acceptance results – to ensure we will meet our target of 90% community support.

This will result in an annual progress report to South West Tourism and the South West RDA, the industry and partners. The report will comment on activities and progress towards the targets and vision of Towards 2015 with recommendations (where and when relevant) for amendments and modifications to the Towards 2015 delivery plans.

MONITORING, EVALUATION AND TARGETS

Following further research to identify the current 'baseline' position, a target framework and associated indicators will be agreed in line with the measures listed below against which progress will be monitored and evaluated:

STRATEGIC AIM	2015 TARGETS
One: Driving Up Quality	<ul style="list-style-type: none"> • Increase the current rate of growth in productivity in tourism in the South West by X%.* • X% increase in the proportion of businesses achieving higher quality standards in recognised rating schemes by 2015.
Two: Delivering Sustainable Tourism	<ul style="list-style-type: none"> • Achieve X% increase of the awareness, understanding and adoption of sustainable tourism practices amongst the business community. • Increase visitors demand for and practice of sustainable tourism by X% within X years. (Research methodology will need to be developed to monitor the impacts on the environment. This will be done in-conjunction with Sustainability South West, Environment Agency, VisitBritain and other partners).
Three: Effective Destination Management	<ul style="list-style-type: none"> • X (number) of DMOs established and operational by [date], the remaining DMOs set up by [date]. • Sub-regional targets and indicators will also be developed to help measure and assess local progress towards the three strategic aims of Towards 2015.
Jointly: Through addressing all three aims together	<p>LESS SEASONAL. To increase the value of visitor spend in the off-peak periods by X%.</p> <p>MORE SATISFIED VISITORS. Visitor satisfaction rates will be in excess of X% by 2015. Achieve an X% increase in the proportion of visitors returning within 3 years of their previous visit.</p> <p>INCREASED WELCOME ACROSS THE REGION. At least X% of people within host communities would welcome and support tourism.</p> <p>A BETTER EMPLOYER. X% of staff employed would be satisfied with their conditions of employment, training and if appropriate, career development.</p> <p>CREATING JOBS. Tourism would be able to create a further X% growth in employment.</p> <p>MAKING EXISTING JOBS BETTER. At least X% of existing jobs would be enhanced in some way.</p> <p>A MAJOR WEALTH CREATOR FOR THE SOUTH WEST. The industry would generate a sustainable increase of at least £X billion per year into the regional economy.</p>

* X% or X number. Over forthcoming months a target framework to identify specific targets will be developed and agreed.

www.towards2015.co.uk



South West Tourism
Woodwater Park
Exeter
Devon
EX2 5WT
Tel: 01392 360 050
Fax: 01392 445 112
www.swtourism.co.uk

South West of England Regional Development Agency
Corporate Headquarters
Sterling House,
Dix's Field,
Exeter,
Devon,
EX1 1QA
Telephone: 01392 214 747
Fax: 01392 214 848
www.southwestrda.org.uk