



Malcolm Bell

Head of
VisitCornwall





The Importance of Transport to South West Tourism Businesses

This Presentation

- Why is it important
- Facts on tourism, transport and carbon
- Issues and challenges for tourism
- Goals and approaches
- Some simple steps
- Final comments



Why is it Important

- Visitor Experience
 - Impacts on overall satisfaction
 - Its too far/too long to travel
- Industry
 - Key competitive issue
 - First line Influencers
- Residents
 - Congestion a key issue
 - Additional costs
- Environment
 - Local impact
 - Global impact
 - Climate change implications



Facts on Tourism in Cornwall

- UK Visitors
 - 4.69M trips by staying UK residents
 - 22.7M nights by staying UK residents
 - £1.1b spend by staying UK residents
- by staying O/S visitors
 - 283K trips by staying O/S visitors
 - 2.28M nights by staying O/S visitors
 - £117M spend
- Day Trips
 - 10.2M trips
 - £448M spend



Facts on Transport & Tourism

- Average length of stay UK – 5.28
- Average length of stay O/S – 8.21
- Average spend of UK £251.81
- Average spend of O/S £390-78
- Day trip average spend £45.44



Facts on Transport & Tourism

- 2009 visitor spend on transport £158M (10% of spend)
- Mode of transport
 - Car 75%
 - Bus 8%
 - Coach 8%
 - Train 5%
 - Air 2%
 - Other 2%
- Average hours travelled per day 1.21hrs
- 30% of visitors have car/travel free days



Cornwall's Tourism Footprint

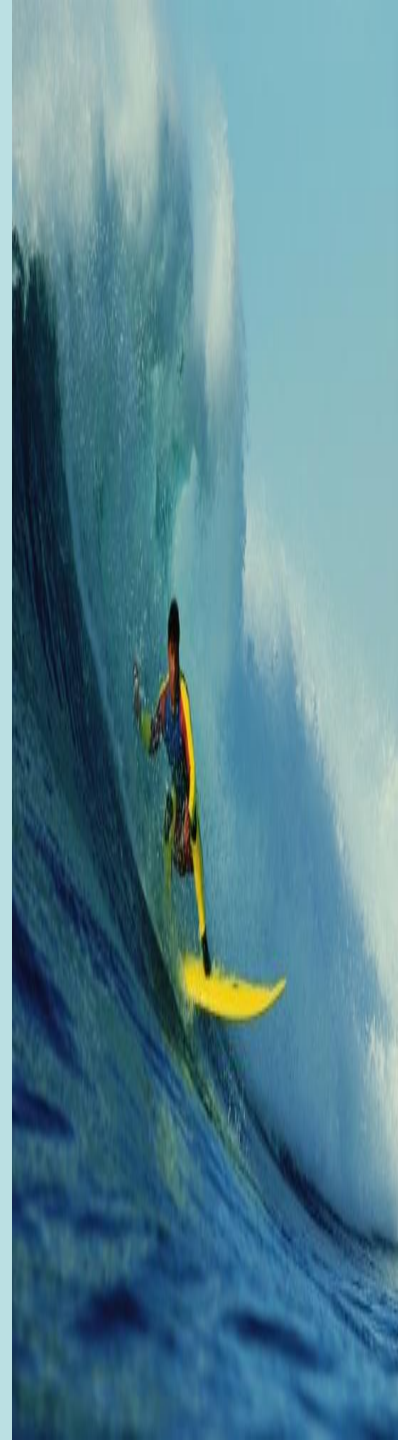


REAP Tourism

This is a tool to help:

- Measure the impact of visitor behaviour in a consistent fashion
- Identify areas of visitor behaviour with a high environmental impact
- Demonstrate the impact of attracting different types of visitor or promoting different visitor behaviour
- Help us understand the impact of tourism in the context of our lifestyles as a whole

Visit: <http://resource-accounting.org.uk/reap-tourism>

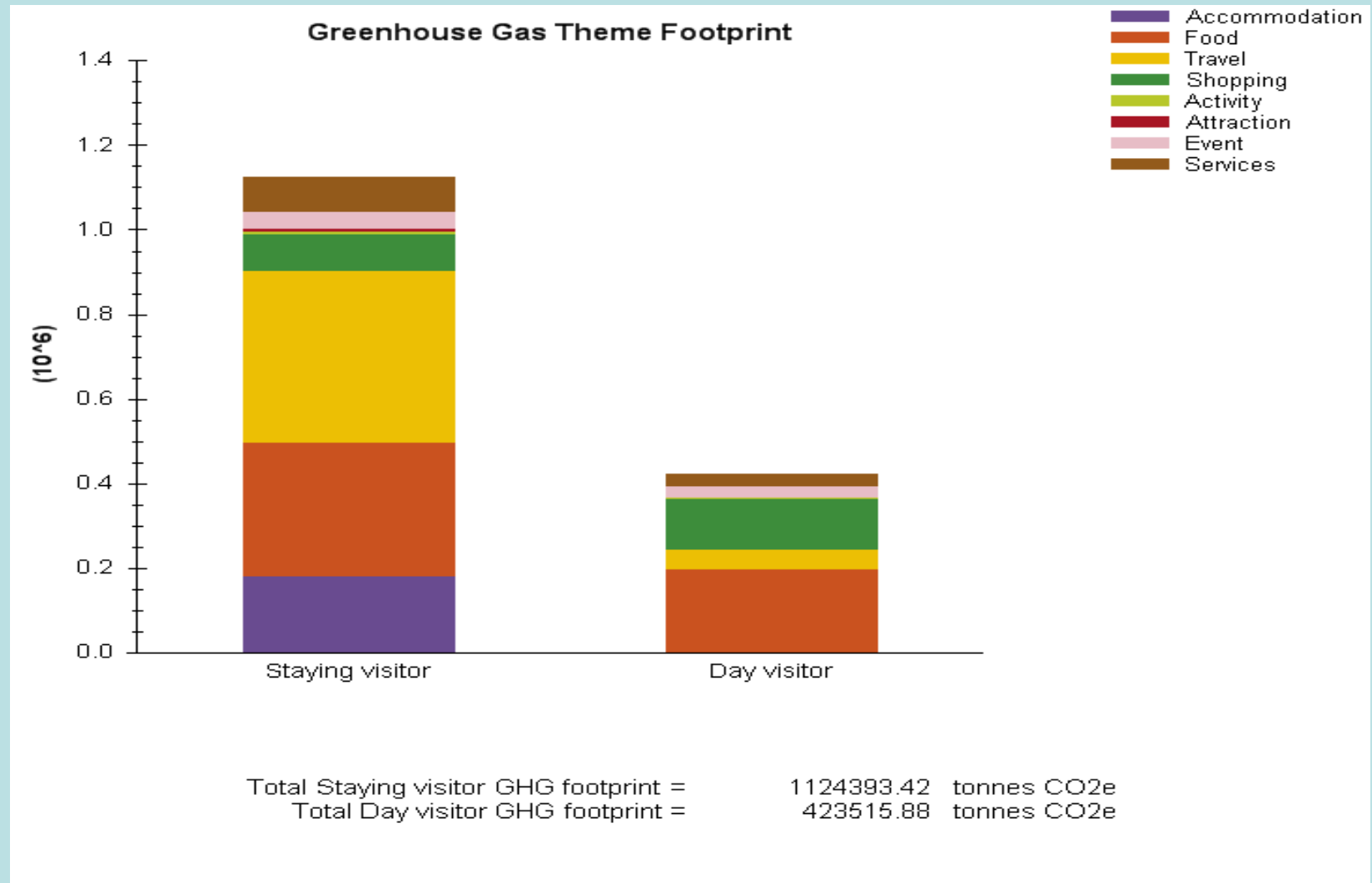


REAP Tourism Spending Categories

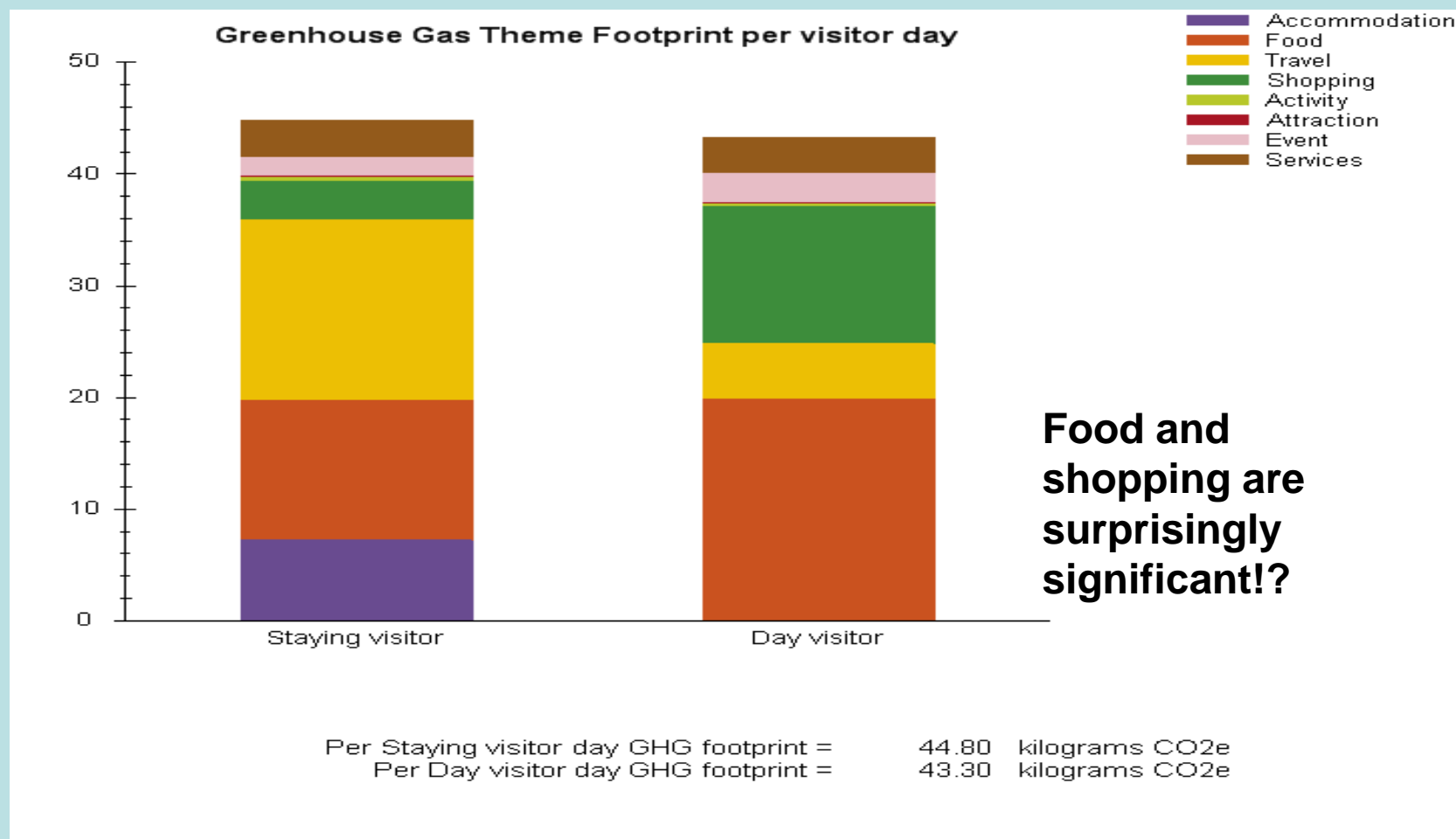
- Accommodation
- Travel
- Food
- Shopping
- Activities
- Attractions
- Events
- Services



Total Greenhouse Gas Footprint

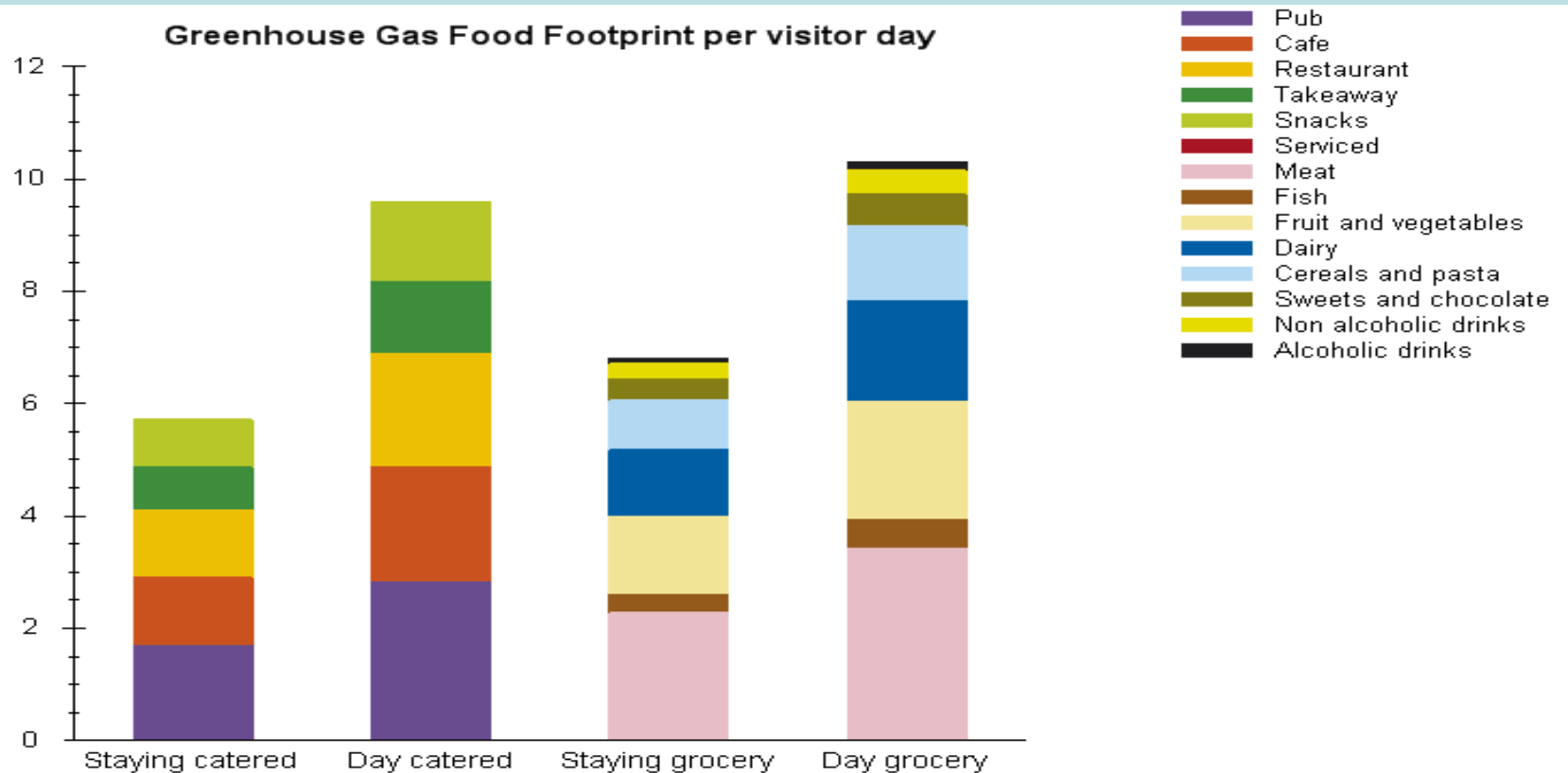


GHG Footprint per Visitor Day



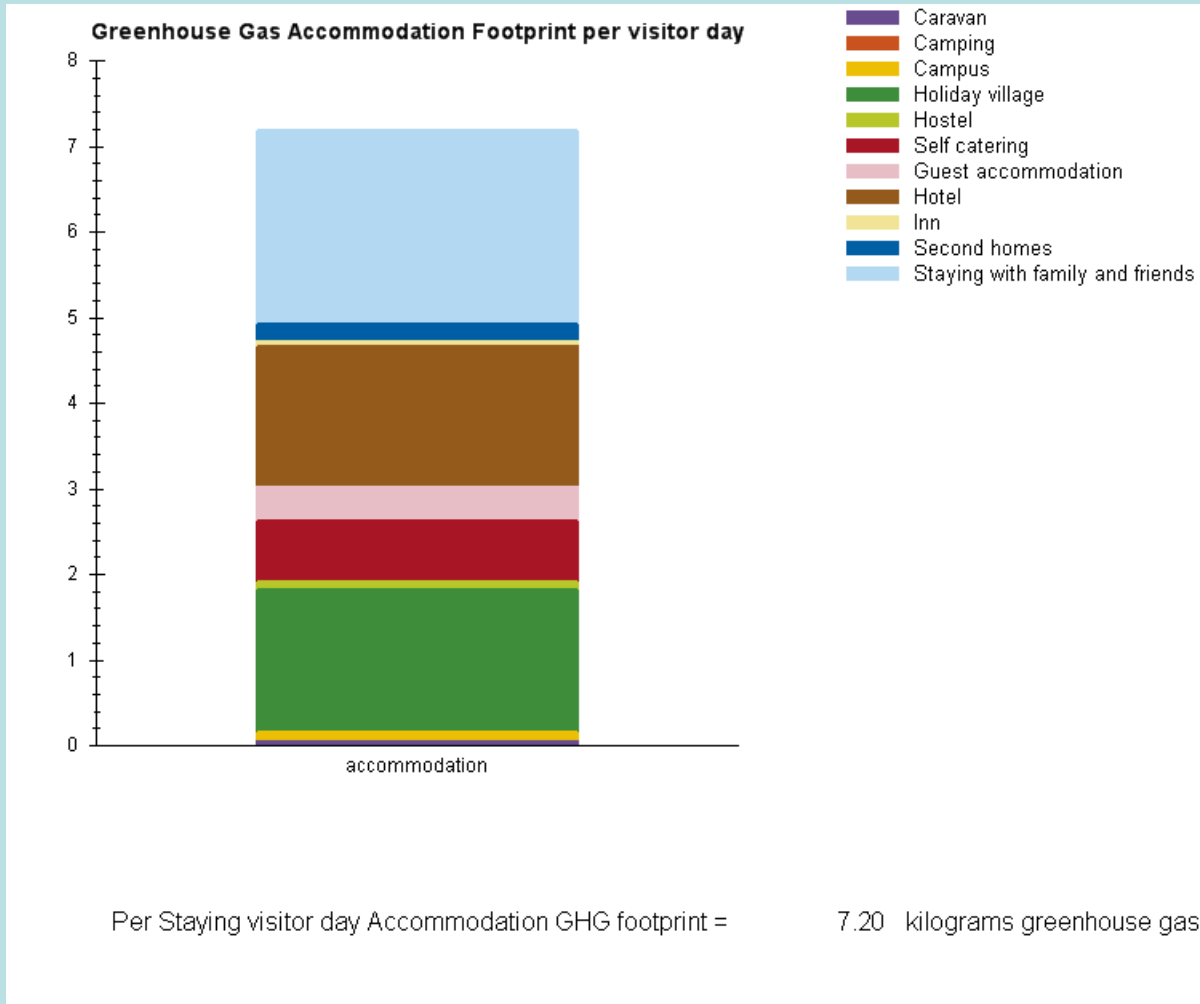
Average British citizen = 10.92 tons p/a (Carbon Trust, 2006)

Food



Per Staying visitor day Food GHG footprint = 12.53 kilograms greenhouse gas
 Per Day visitor day Food GHG footprint = 19.90 kilograms greenhouse gas

Accommodation



GHG Staying Visitor per day

Staying with friends and family is the largest proportion, at 31.5%

Key Issues & Challenges

- Competition
- Marketing to minimise impact
- Reducing Impact on travel to and from
- Reducing Impact during stay/trip
- Information to influence
- Incentives to change
- Last but not least policy context



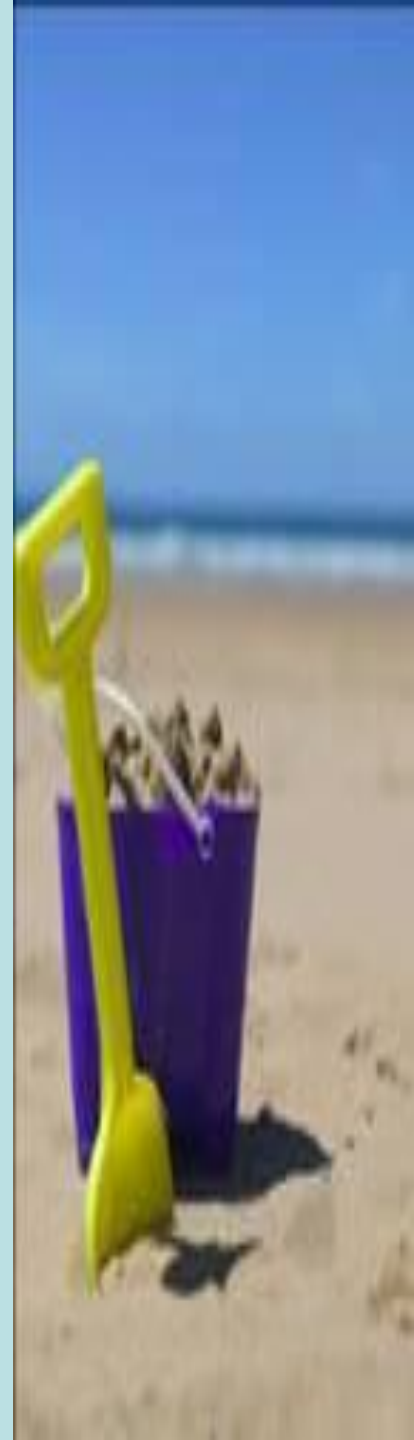
Competition

- Tourism largest and fastest growing sector in the world
- Competition is fierce and growing
- South West Customers live in rest of SW, London, Midlands – lots of choices and competition between us and our customers
- Costs – rising fuel, less pending power, maybe shorter stay and/or lower spend
- But air travel getting more expensive



Marketing to Minimise

- Turing the tide on more frequent and shorter break culture and marketing
- UK Government needs to push/lead
- Sell the stress breaker benefits of longer short breaks
- Source customers from nearer to home, The shorter the break the nearer to home
- Focus overseas on near markets and extending long haul from London



Travel - To and From

- Modal shift and a realistic “art of the possible approach”
- Segment market research needed
- But possible actions include:
 - Sell the value of packages
 - Making the journey part of the holiday
 - Car hire for part of stay
 - Accommodation pick up
 - Luggage issues
 - Plus



Influencing planning of the journey

- Cost analysis ready calculator
- Example routes and trips with signage
- Dynamic planning tools re time and cost of travel
- Benefits of taking a break on the way up and down
- Live travel information during travel



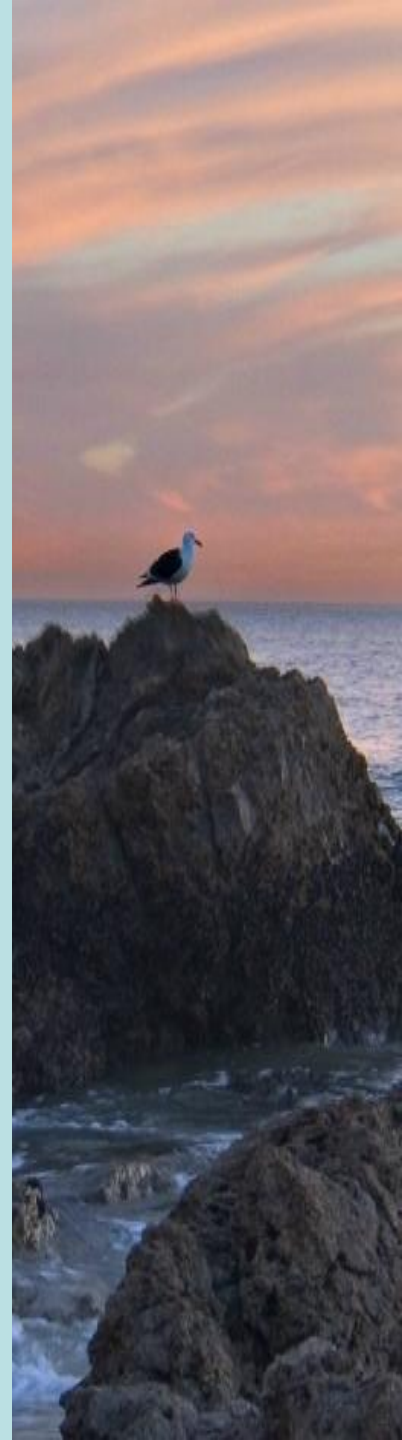
Flexibility

- Shift of change over days
- Accommodation schedule to maximise lulls in traffic volumes
- Accommodation providers assisting in travel planning to and especially from
- Dynamic information at attractions and restaurants



Reduce Impact During Stay

- Non travel days
- Reduce travel as well as modal shift
- Rich Information and content needed digital and local
 - Explore local area
 - Car free days out packages
 - Novelty transport options
 - Car-public transport
 - Accommodation providers key to influencing visitors and develop itineraries for above options



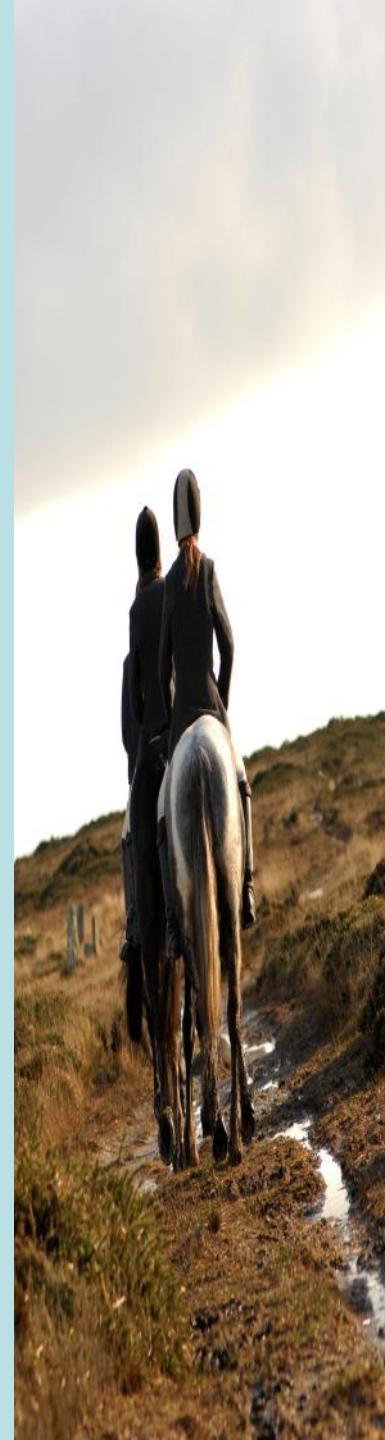
Information to Influence

- Tourism and travel Journalist
- Celebrity exemplars
- The balanced approach – Travel to explore vs holiday/break to relax, recharge and grow
- Tourism Boards PR & calculator/examples etc
- Cost options to and from and during
- Localised info and events activities and attractions



Incentives to change

- Information, information, information
- Discounts
- Rover tickets
- Car parking charging prices
- Green points
- plus



Policy Issues

- Tourism the “Cinderella” syndrome
 - Residents voice loudest
 - Full economic impact not universally recognised
 - Tourism optional/candy floss industry
 - No decent jobs
 - Commuter over tourist (bank holiday rail works etc)
 - Bus and Coach drop off and parking
 - Car parking policies creating travel
 - Concentrate and disperse



Goals and Approaches

Overall goal

To improve access to tourism destinations, enhance transport management at those destinations, while minimising the impacts associated with travel



Summary of Goals and Approaches

Key Goals

- Reduce the carbon footprint of travel to and from
- Reduce the vulnerability to rising fuel prices
- Spread the timing of tourism travel
- Maximise tourism potential to complement services/infrastructure used by residents
- Reduce impact on local environment and communities
- Improve the visitor experience to and within destination



Some Simple Steps

Tourist Bodies

- Sustainable tourism must be at the heart of the organisation thinking and action
- Measurement needs to change with set of balanced indicators
- Promotional Activities to produce higher dwell times and lower mileage
- Inspire, influence web content
- Information widgets
- Use of web and social media



Some Simple Steps

Tourism Businesses

- Messaging in the marketing
- Messages from previous customers
- Information on website
- Linkage to planning tools/website
- Pick up and drop options
- Luggage transfer services
- Plus plus



Final Thoughts

- Its about a different way of
 - Thinking
 - Planning
 - Acting
 - Measuring
- Apply marketing and yield management to transport and carbon - i.e. low environmental impact but high economic and social impact
- Travel as a quality aspect of any holiday or break





Malcolm Bell

Head of
VisitCornwall

