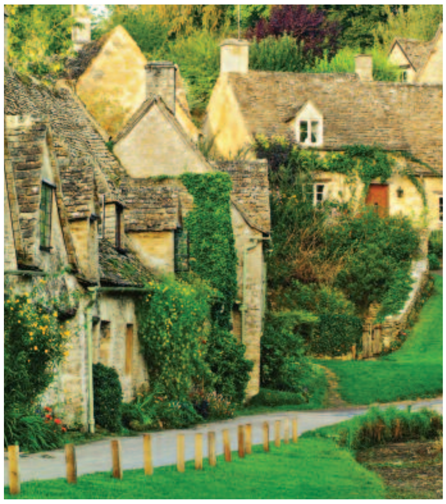
South West Tourism

Travel Trade Research Project





SOUTH WEST ENGLAND IS GREAT BRITAIN

Introduction

Aims and Objectives

- Understand the trade's current engagement with the South West of England regions, products and services.
- Understand the scale and volume of the trade's engagement and sale of the South West of England.
- Understand barriers to engagement; and the potential for barriers to be relaxed.
- The research will form part of a 3-year legacy whose ultimate aim is to facilitate growth in visitor numbers and spend in the South West, hence benefiting the wider economy of the region. This will deliver an evidence based work programme to support future activity and strategic objectives.

Methodology

Stage One – Sample Recruitment

An initial online survey was sent to ETOA travel trade buyers and a selection of other non-ETOA members and overseas operators sourced via Visit Britain overseas teams, optimised by offering an incentive such as a family holiday for 4 in the South West.

The survey asked 4 questions:

1) Do you currently sell the South West of England to your clients? (answer 'yes' or 'no').
2) If you have answered 'yes' which of the following products do you sell? (tick list provided)
3) If you do not currently sell the South West, would you be interested in hearing more about how their products and services might match your client's profile (tick yes or no).
4) Would you be happy to take part in further research (tick yes, no).

At the conclusion of the online survey, ETOA created a sample list comprising members who currently sell the South West and those who are not currently selling the South West but are willing to participate in further research/could be influenced to sell the South West.

Stage Two – Field Work

A questionnaire was designed in discussion with the client to address the key themes of the project covering the following themes:

- Product being sold – regional spread and split.
- The typical traveller profile.
- How the product has performed in terms of profit/turnover.
- Level of future commitment to the South West product.
- Level of repeat business.
- Customer feedback and satisfaction.
- Customer needs that might not be met currently.
- Barriers that inhibit greater take up of South West product and the potential for barriers to be relaxed.
- Ease of accessing resources about the product offering in the South West.

40 interviews were conducted by Paul Rickard, ETOA's Research Consultant in the form of one to one in-depth interviews, mainly on the telephone and in person where possible. An invite to participate in an online version of the questionnaire survey was be sent to all other respondents that opted in to assist with further research.

Stage Three – Outputs and Deliverables

- ETOA have collated the results and provide this draft feedback report to the South West Travel Trade group.
- The report should be treated as an internal tool for limited distribution amongst a closed group of DMOS and members of the South West Travel Trade Group.
- For those who agree, we will forward details of operators who are interested in specific sectors (eg. Small scale accommodation, overnight visitors, day visitors, groups, special interest). Please note that there is a strict Code of Practice on revealing details of individual respondents and their opinions.
- At this stage we would recommend a feedback/consultation session with the South West to discuss draft finding and how these can be converted into budgeted action plans.
- Based on feedback from the trade we have found it challenging to provide 3-year action plans for each county as county level information was not always forthcoming.

Contents

Distribution of this report is restricted to VisitEngland, VisitBritain and South West DMO staff, and it should not be circulated beyond this group. ETOA conducts research following the principles laid down by the Market Research Society Code of Practice, and these govern the dissemination of confidential opinions. Where participants in the trade survey gave their permission to be quoted and identified, this was on the strict condition that their opinions were shared only among this small group of DMOs.

A separate version of the report is available which is intended for wider distribution. While this amended version also reports the specific opinions of contributors to the research, the source/identity of opinions have been removed.

Section 1: Qualitative survey of travel trade

Sampling and selection

- A preliminary email survey was undertaken to identify respondents who were willing to participate in further, more detailed, research about South West England. This stage incorporated databases of tour operator companies who form part of ETOA; attendees of Showcase South West (a B2B networking event in the region, which took place in February 2016); contacts from a number of VisitBritain's overseas market offices.
- In total 1,897 contacts were contacted by email, generating 66 leads currently selling SW England.
- Recruitment method involved (1) initial explanatory email to all contacts; (2) follow up reminder email; (3) if no reply to emails, contact by phone, where number available on database.
- 35 interviews were completed.
- There was no requirement for quota controls, and the final sample was randomly selected on the basis of respondents willing to participate in the more extensive qualitative discussion stage.
- The final sample featured a broad cross section of operators, DMCs and wholesalers, with large variations in the volume of business activity in the region.

Respondent	Business description	Volume of SW business
Back Roads Touring (Mainly groups)	Small group operator, offering minivan-based tours across Europe. Main clientele comes from Australia and New Zealand.	About 200 tours across the year, with an estimated 2,000 – 3,000 pax.
Superbreak (FIT)	Leading short break specialist in the UK.	Estimated 10,000 bookings to the region. Torquay about 4,000 of these.
Select Travel Service (Groups)	Custom operator and DMC focusing on group touring and incentives. Particular emphasis on special interest tours.	Room nights for the SW in the range of 1,500 – 2,000
Irish & English Tours (Groups)	Ad hoc groups and series, mainly tailor-made round trips into Ireland and the UK. Main markets are Germany, Austria and Switzerland.	Between 200 – 250 pax. a year
Studiosus Reisen (Groups)	Claims to be the number one cultural tour operator in Europe. Heavy emphasis on tours being ecologically sound and reflecting a strong sense of social responsibility.	Estimate 3,500 pax. a year to the UK and 40 of these visit the South West
ACIS/AIFS (UK) Ltd (Groups)	American Institute for Foreign Study Inc (AIFS) and its family of companies organise educational and cultural exchange programmes.	About 200 pax. a year, about 25 are staying visitors, the rest day-trippers
Tourwise of London (Groups)	UK and Ireland handling agents for Globus, Cosmos and Monograms, who are worldwide operators of escorted tours.	Travelling through 50,000 – 60,000. Staying overnight, 4,000 – 6,000.
Kuoni Group Travel Services (Groups)	Leading wholesalers of accommodation, ground travel services and group tours.	Very rough guess about 30,000 pax. a year for the South West

Respondent	Business description	Volume of SW business
Sovereign Travel (Groups)	Destination Management Company handling a wide variety of specialist groups travelling to the UK and rest of Europe.	About 400 a year on complete tours and further 600 on broader UK itineraries.
Janet Redler Travel (Groups/FIT)	Specialist in inbound tailor-made, personal and luxury tours of Wales, the UK and Europe.	About 200 pax. a year on itineraries featuring Cornwall
Senior Discovery Tours (Groups)	Provides fully escorted group tours to Canadian travellers. Tours are generic and do not focus on any particular interest.	About 200 pax. a year to the region
Battered Suitcase (FIT)	UK based tour operator specializing in exclusive travel experiences to UNESCO World Heritage List, Cultural, Historical and National Parks.	Budgeting 480 visitors to the UK, but don't know what proportion will visit SW
The Circle IHM Ltd (FIT)	Represents over 700 independently-owned, UK accommodation providers, on an agency basis with tour operators and direct with customers to generate business for members.	Represents 106 properties in the South West. Estimates about 300,000 – 350,00 bookings in total from 106 properties
SKR Reisen (Groups)	Germany based operator, providing combined cultural and hiking/walking vacations.	About 100 pax. across 9 Cornwall trips.
Greatdays Travel (Groups)	Wholesaler of tailor-made itineraries to coach based tour operators mainly in the UK	About 1,000 pax. into the region in 2015
Rick Steves Travel (Groups)	US-based operator, branded around the well-known guidebook writer, TV and radio host Rick Steves.	Estimates about 1,000 pax. a year
Axis & Globe (Groups/FIT)	Leading independent inbound operator providing accommodation and ground services for groups or individuals travelling to UK & Ireland.	Estimates 340,000 into the UK, but doesn't know what proportion visit the SW
CITO (Groups)	The Consortium of Independent Tour Operators is a non-profit organisation of 15 nationwide coach tour operators. CITO provides member services including contracting of hotels, as well as a programme of worldwide air and cruise holidays which members sell as agents.	Estimates about 1,000 pax. a year
CTS Horizons (Groups/FIT)	Specialise in inbound clients from China to the UK and Europe, catering for small groups, tailor made, business and MICE.	Estimates 50-60 groups a year into the SW region
Jac Travel (Groups)	Leading wholesaler of hotel accommodation for the global travel industry and provider of specialist inbound travel services to the UK and Ireland.	About 20,000 pax. a year to the region
Business Horizon International Group (Groups)	ADS accredited, UK based China-European travel operator.	Approx. 150 a year

Respondent	Business description	Volume of SW business
Vosaio Travel Group (Groups)	Air and coach bespoke package tour wholesaler, operating in Asian markets.	Approx. 150 a year
Abercrombie & Kent (Groups/FIT)	High end, luxury tour operator. FIT about 50 of US business.	Estimates 200 pax. a year
Travel Boutique (FIT/Groups)	Offers services for both FIT and groups including guides, transports services, accommodation, language courses, tickets to events, theatre and festivals.	Estimates about 20/30 family groups a year. 100 pax., 500 overnights
Europe Incoming (Groups/FIT)	Incoming operator for groups and FITs visiting Europe, mainly student groups in the SW.	Less than 1,000
ICT/South Quay (Groups)	Leading wholesalers to coach and group operators in the UK develop tour planning and booking services for coach and group operators.	About 10 tours from 2016/17 programme featuring SW content
Veenus (Groups)	Wholesale provider of high quality, innovative tours to the group market.	About 20 packages with SW content; 20-53 pax. per trip
Service Reisen Giessen (Groups)	Germany-based trade only wholesaler specialising in packages aimed at group travel market.	In 2016, 185 groups featuring SW, with an average 33 pax. per group
TMT London (Groups)	Small bespoke B2B operator specialising in the Italian market.	5-10 groups a year into the region, with average 20-25 pax.
Voyage Prive (FIT)	Members only luxury travel club offering flash sales to a closed online membership of about 2,000. Includes several hotels in the SW region.	Estimates a few hundred bookings for the SW. Recent Carbis Bay offer generated 40 bookings (80 guests)
GEG Europe (Groups)	Day tours to the region for Chinese speaking clients.	Total day visits to the region 1,800 – 2,000 a year2,000 a year
Live Travel & Tours (Groups)	B2B operator specialising in performing arts group tours, mainly students and young people.	About 90 of all tours touch the SW region, but could only estimate 'hundreds rather than thousands'
Interopa Holidays (Groups)	DMC for London and UK, providing accommodation for individuals and groups, transfers, visitor attractions, football and concert packages.	About 50 groups feature SW region, with a minimum of 25 pax. per group
ReiseHorizonte (Mainly FIT)	Specialist German-based operator, main regional focus is Scotland but with small amount of South West.	In last trading year, about 20 pax. into the South West

The discussion guide

In order to facilitate rich insight from the travel trade and their experiences of doing business in the South West, a discussion guide was compiled. This facilitates a more conversational style of questioning, and enable a deeper probing of issues than a more structured questionnaire approach.

The ability of individual respondents to address every topic in the discussion guide was mixed. Inevitably, operators with larger volumes of business tended to have a more detailed command of the region, whereas those operating on a smaller scale were more inclined towards a less detailed command of the area.

It should also be noted that while the briefing specified the need to generate feedback on each of the counties comprising the region, in practice few respondents were able to view each county in terms of their relative strengths, weaknesses and opportunities. The geographical context for most respondents was the specific locations (e.g. Bath rather than Somerset; Jurassic Coast rather than Dorset) that feature in their itineraries, rather than by counties.

The discussion guide was as follows:

Q. Looking at your company's current tour offering, which tours feature South West England? (List out). Prompt, where appropriate, if different products are featured for different tour brands.

Q. In terms of the customer mix, which are the main geographic markets for tours featuring South West product? Do certain types of tour attract interest in particular geographic markets?

Q. Do your tours to this region of England attract a particular type of customer? Are there particular characteristics about customers for these tours? For instance, is it a youngish and/or more elderly profile? Do they tend to have specific interests that they're exploring?

Q. How long have you been featuring the South West in your offer? How many pax. are you bringing to SW per annum? What potential for growth is there? Are you featuring more/less South West tours than five years ago, and if so, by how much?

Q. How important would you say that South West products are in the company's overall tour offer? What proportion of tours feature the South West? How could you sell more?

Q. How have South West tours performed in terms of turnover in the last five year years? How many visitors do you estimate you brought to the South West region in 2015? Is this a rising/declining trend?

Q. Looking ahead, would you expect to be featuring more/less/the same amount of South West England content in the next few years? What are the reasons for your answer? What can be done to influence you to sell more?

Q. Thinking about the feedback you receive from customers, what are the overall levels of customer satisfaction? How does this compare with satisfaction from the South West's main competitor destinations?

Q. Are there specific aspects of South West England that attract particularly positive and/or negative feedback from clients? What do your clients think about the quality of products and services they experience in the South West (prompt aspects such as accommodation, attractions, access, and transport.)

Q. How easy is it to sell the South West on its own? Is it easy/difficult to package with other regions of the UK?

Q. Thinking specifically about the region's tourism fabric and amenities (i.e. its accommodation, attractions, experiences, ease of access, road/rail links, restaurants, etc), what are its strengths and weaknesses? Are there gaps/opportunities in the product and service that suppliers and tourism authorities could/should be addressing to make the region more attractive? What are the main supply issues you face?

Q. Using your knowledge and experience of dealing with South West suppliers, are you able to give some opinions on the individual counties/districts that comprise the region? In particular, (a) any aspects in their local tourism offers that are barriers to business and (b) suggestions for making their offers more attractive to tour operators.

Q. How does doing business with South West suppliers compare with other regions in the UK? (Probe for strengths/weaknesses/obstacles)

Q. There are a number of Destination Management Organisations in South West England, what is the quality and quantity of support you receive from DMOs in the region? In particular, the ease of accessing resources about the region's amenities and attractions? Are there particular strengths/weaknesses among the DMOs in the regions? What could they be doing better? (Prompt for examples of best practice)

1. South West England activities, market conditions and business prospects

What draws visitors to the South West?

- Most of the South West region's tourism persona is reflected in the responses of the sample. The key themes of, 'heritage', 'history', 'natural beauty', 'Englishness' were very evident.
- Inevitably, different operators have contrasting levels of engagement with the region. While about one-half the sample tend to orientate towards the best known iconic attractions and sights in the region (most notably Stonehenge and Bath), others are clearly inclined towards destinations away from the mainstream, and will actively seek to include these in their itineraries.

"Our tours are slow paced, not rushed. The key thing that clients want is Small England - attractions and accommodation that offer character, heritage and tradition".

"We see ourselves less as a leisure operator, but more culturally oriented. We like our tours to build bridges between cultures. We want our guests to feel they've discovered countries. Our tours are more intellectual than those of the big operators... Rosamund Pilcher is also important, people being drawn to the landscapes shown in the TV series, rather than the quality of the playwriting".

"Germans value big landscapes, so we feature Land's End, Dartmoor, the coastal areas, fishing villages as well as gardens (Eden Project and Heligan), Minach Theatre and St Ives".

"Our visitors tend to be quite stereotypical, interested in the usual aspects such as heritage/ancestry (eg Pilgrim Fathers and Plymouth); scenery and the region's quintessential English village appeal; many associate the SW with what they think England is really like".

"Visitors are quite discerning, drawn to attractions/locations off the beaten track – for instance, a preference for Avebury rather than Stonehenge as it offers a more authentic, less touristy and cheaper experience. Our clients wouldn't be attracted to the visitor centre at Stonehenge, they want something more real".

"Culture, history and heritage are the main interests in the region. A typical tour might include Stonehenge, Bristol, a couple of fishing villages, Land's End, Eden Project and a day trip to Bath from Bristol. And of course German markets want to see the landmarks they've seen in Rosamund Pilcher".

"Our tours tend to take in the traditional sites in the region - usually a mix of castles, gardens, boat trips and railways. There's not much demand for culture/heritage attraction".

"They buy tours to Cornwall on the idea of it being pretty, historical and good for culture".

"The choice of attractions is driven by what they've heard of what they've seen on the TV".

"Chinese tourists don't require long stays at any of the attractions, they don't get immersed. Generally they only want a photograph. Often they'll be acting on recommendations from friends and family about where to go, but for this market, Bath and Stonehenge are absolutely essential".

How do visitors see the region?

- Among those respondents in the sample that are in touch with customer feedback (the majority are B2B), the overall impressions and sentiments expressed by visitors is almost uniformly positive. The tourism product, its depth and variety of attractions, sites and landscapes is clearly acknowledged.
- The one notable area of dissent was the quality and high price of hotel accommodation, and this tended to most strongly expressed by German operators.

"There is always a tour manager that manages the feedback. In most areas it's very positive. History and heritage is great; the venues are great; accommodation is OK (but expensive), and the food/drink seems to have improved everywhere".

"Generally, guests really appreciate the area, its cultural attractions and landscapes. They love the diversity. Most negative feedback is reserved for hotels. Germans are quite a demanding market, and we get guests criticising the hotels because they're worn out with poor standards of service".

"Generally clients are thrilled. It has wonderful destinations/attractions. Rarely hear any negative feedback".

"Clients love the area around Bath and the Cotswolds because it represents what they think of as Britain. It's all the stereotypes, but these still play out very strongly with a US clientele".

"We have quite a loyal customer base, with a lot of repeat custom. Because of the high values and service we bring to our business, we consciously avoid including any elements in the tour that will attract criticism, hence why we couldn't accommodate the Swedish group referred to".

"Feedback is always good. We use good accommodation and have great guides, so guests are never disappointed".

"People like the region because it's perceived as being more laid back than the rest of the UK and a slower pace of life. Rarely hear anything bad about the region, mainly because its attractions are so varied and interesting".

"Feedback from clients is always good. We get quite a lot of repeat business. First time visitors just want to go to London and the well-known regional destinations like Cambridge, York, Edinburgh, Lake District. When they return for a second time, it gives me an opportunity to promote the wider region to my clients".

"Feedback is mostly quite positive. Customers think the region's attractions are fantastic. People love the little towns and the countryside. Most complaints are about the hotel standards – too many hotels are priced too high for the quality they offer. Particularly bad around Falmouth, Newquay and Penzance. Not such an issue in cities like Plymouth, Exeter and Bristol where the chains are well represented. It seems to mainly be a problem with independent run hotels. Typical complaints are about old fashioned properties, fusty rooms, old carpets and big variations in room quality and sizes in the same hotel – this can result in a situation where people complain that others on the same tour have got much nicer rooms".

Traveller profile

- With a large contingent in the sample being coach-based operators, or wholesaling to this sector, the traveller profile served by the sample tends to skew strongly towards an older age profile, typically 50/55+. About three-quarters of the sample were engaged in large, coach-based, operations, with the remainder handling smaller groups, often with a special interest.
- Where the respondent is a small-group, special interest operator, the very nature of interests such as gardens, historical artefacts, culture, ancestry, also tends to bias towards this older age group, as well as a more affluent clientele.

> **"We operate in German speaking markets where the profile tends to be a bit mid/older (50+), and relatively affluent. Rosamund Pilcher is the main attraction. Germans value big landscapes, so we feature Land's End, Dartmoor, the coastal areas, fishing villages as well as gardens (Eden Project and Heligan), Minack Theatre and St Ives".**

> **"This is a coach based audience, so average age is probably 70+....people will choose a coach tour when they can't get out and about any more".**

> **"The Japanese market tends to be the most elderly, typically in the 50-70 age range. Chines/Taiwanese markets more mid-aged, 40-60".**

> **"It's a 50+ market, quite a lot of retired travelers. They're more discerning, more curious than the average visitor....certainly not the Rosamund Pilcher type of visitor".**

> **"Our typical customer is middle aged, middle class, couple, sometimes two couples together on a fly-drive, and/or ferry-drive tour. They tend to be fairly affluent, with high expectations in terms of characterful, traditional, small properties".**

> **"Our market is high end, 55+, senior executive level, entrepreneurial and well remunerated professionals, with incomes averaging $250K. The average booking is well into the thousands of dollars, often $10K or more. The Connections brand is less expensive, typically attracting affluent empty-nesters".**

> **"Our tours attract a 50-55 year old client base, with an active interest in hiking, nature and culture. They tend to want a more 'intimate' touring experience rather than mingling with large crowds".**

- The sample also included a small number of operators specialising in the student market, as well as a couple that specialise in the performance sector
- Geographically, the sample of operators and wholesalers in the sample features a strong representation of European markets (predominantly German speaking), North America, as well as 2/3 representing Asian markets.
- To date, interviews with three in-market operators based in Germany and two in North America.

Developing more experiences in the region

- While the South West's tourism offer is populated by well-known, some world-class, iconic landmarks, it's quite clear that the travel trade is looking to overlay these with more experiences. The context for this is often that while their customers may often gravitate towards the older end of the age spectrum, today's 50+ generation are a different breed to what they were twenty years ago.
- They're healthier, fitter and their attitudes to touring are shifting in favour of 'doing things' rather than just 'looking at things'. This trend is of course playing out in tourism markets across the world, but there is clearly a role for tourism boards to help publicise and promote the 'doing' as well as the 'viewing'.

"We try and add value to our itineraries by featuring experiences….something different, the hidden gems, for instance our Berkeley, Brunel and Bygone Britain package features a behind-the-scenes tour at Berkeley, a Q&A session with an heir to the estate, cream teas, guided tour of SS Great Britain".

"Today's 55+ are different to previous generations, they're a lot more active, and need more from a trip than just looking at things. They increasingly want experiences, things to do, meet local people, do things that are typical of the area, such as cooking with local foods. They want to learn about the local people. It's important that we're giving them new things to see and do. Increasingly our customers want to visit more than Prideaux Place".

"We're especially interested in the more quirky sites and experiences, things that can catch the eye, such as the Pudding Club".

The role of TV and film

- There were frequent references to the importance of television and film as a factor that generates traveller interest, as well as doing an important marketing job for the region
- Inevitably, it is the Rosamund Pilcher adaptations on German television that attract many Germans to the region. While a couple of operators suggested that the Pilcher factor may have run its course, it is still a compelling call-to-arms for the German market. As one operator put it, "you've got to have Pilcher in your brochure, it's part of the Cornwall brand"

"Movies, film and TV can have a huge impact on interest levels for the region. Doc Martin for instance is popular and we get asked about places like Port Isaac as a result".
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"The South West will probably get its day, but it's all about marketing and what appears on Chinese TV. The Asian market is very fickle, always looking for the next big thing and new things to do. Every season there's a shift towards some new attraction. In China in particular, if UK attractions get airtime on TV, this can produce a very considerable increased in demand. Two years ago, Cardiff Castle was featured on Chinese TV, and demand shot up"

"We recently started featuring Wheal Martyn, after seeing it on Neil Oliver's Coast series".

"The region is very responsive to film and TV coverage – and that this isn't promoted strongly enough. Programmes such as Doc Martin (Port Isaac) produce a noticeable uptick in demand, but yet to see anything similar with Poldark. Also French Lieutenant's Woman, and the positive impact it had on Dorset tourism. Rosamund Pilcher is a huge draw among Germans, and apparently Italians as well".

Building knowledge about the region in-market

- Almost one-third of respondents highlighted that in their markets, much of the South West was relatively unknown, and that this was limiting its growth potential. This was probably most evident among respondents active in the emerging markets of Asia, but also in the USA.
- An additional constraint is that London can tend to dominate the tourist agenda, which creates challenges in terms of getting visitors to look further afield than London.

> **"The reality is that our North American customers tend not to ask for the South West because they don't know much about it. Trying to encourage people to the South West is difficult. They all want London, and if they do want to do attractions in the South West, because they're used to driving long distances, they're happy to strike out on day trips from the capital".**

> **"The South West should be more important and we want to build it up. But we don't really know the regions very well, so we need people to help build our knowledge. Until I went to the Torquay event, I'd never heard of the Scilly Isles".**

> **"The potential is big from Asian markets, but the South West hasn't promoted itself effectively in this part of the World".**

> **"The South West isn't very important. Getting visitors to go to Bath, Bristol and Stonehenge is easy. But Devon and Cornwall is a real corner and few Chinese have any idea what's down there".**

> **"But people in our markets don't know much about the region. Last year, tried to add something a bit different by featuring St Austell Brewery, Cornish Mines, Cornish cider, but these didn't get much take up. We're trying to tell people that there's more than just London".**

> **"We need to do more to attract people out of London….a lot of visitors want to jump straight from London to Scotland, without wanting to see anything in between".**

> **"It's always a real push getting US visitors to stretch their horizons and look further than London – a lot of them will just prefer to stay in London and do day trips out to places like the Cotswolds".**

> **"Going forward, the only real way to build demand is by raising awareness of the region. For instance Cornwall has so much good product that is right for the US market, but people over there just don't know about it. The Cornish product is as good as Ireland, if not better, but Ireland is a model study in how to market itself to countries such as the US".**

> **"We rarely set foot in Devon and Cornwall as these are not in demand – our markets haven't heard of them, they're not of the radar. The only demand we get for that part of the world is if people come to us with a Celtic themed itinerary".**

> **"In terms of selling more, people need more knowledge about what's in the region, both travelers and the travel trade. Ultimately, it's an awareness thing, a lack of knowledge we have to contend with".**

Packaging the region or selling it on its own

- For about 60   of respondents, their programmes will feature the South West both as part of a more extensive UK itinerary. As a very rough rule of thumb, long haul markets, especially first time visitors, tend to prefer the longer UK itineraries and these will provide a less immersive experience of the region, concentrating mainly around the Stonehenge/Bath/Bristol axis.
- The option of packaging the region or selling it as standalone may often be dictated by the logistics of where visitors arrive in the UK (typically London and/or the Channel ports).
- About 10   of respondents also highlighted the region's challenges in terms of its route challenges. Its geographical isolation, and long travel distances involved between attractions towards the most westerly areas can limit the ability to create circular itineraries.

"Because the SW has honeypot destinations like the Cotswolds and Bath, which generate very high levels of interest, the region is quite self-contained. So, yes, it can be packaged on its own. But we only do a small number of tours, it's difficult to say whether there's potential to widen the number of tours to include just the SW, or whether it has to be packaged with other regions".

"It can be sold quite easily as a stand-alone destination. Already in our 2017 brochure, we're featuring 10-11 suggested itineraries in the region".

"It could be sold as standalone, but for the foreseeable future, it sells better as part of a wider UK tour. Not sure that demand is sufficient to warrant a standalone".

"It can be challenging to create a complete package because the geography and location of some of the main attractions means long travelling times. People can be spending a lot of coach travel time whereas we're trying to reduce the amount of time clients sit on coaches. Generally, we don't take our guests west of Newquay because the distances and times needed to get to get to the key landmarks (e.g. Land's End) get longer".

"The issue with the South West is being able to bundle the right number of attractions to appeal to a particular/special client interest, and then build them into a drivable route. We've got to string 2, 3, 4 attractions together to get clients there. It's not feasible putting them in a car for six hours just to go and see Land's End".

"It's normally packaged with other regions, depending where people enter the UK. The region can be challenging because it's a bit of a dead end, and you have to reverse once you reach the far end. You can take people along the south coast and back along the north, but for a lot of people, the north coast looks much like the south".

"Also, the geography of the region makes it challenging, because the further west you go, there are bigger distances to go between attractions. As a planner the region is challenging because you find yourself having to reverse. The farther west you go the more difficult it is to wrap it up into a programme".

The business climate in the region, trends and growth prospects

This section considers the responses to the current trading climate in the region, how trends have been developing and how they are likely to develop in future.

There is a perceived constraint on business growth as a result of the low profile of the region in long-haul markets in particular, especially in the developing markets of Asia. This suggests that for the tourism boards in the region, their main role in business expansion should focus around promoting the region in-market, creating a higher profile for the region while generating 'reasons to visit'.

A region that is holding its own

- Across the board, the majority sentiment was of a South West region that has been holding its own in the context of the wider UK.

> **"It's a pretty stable picture, demand is much the same as it was ten years ago. Don't see much potential for growth, expect business levels to stay about the same. The best way to sell more is to look at how the region promotes itself abroad".**

> **"The South West is a long standing part of the offer. 2015 was a great year, with over 100 pax. across nine Cornwall trips. This year, figures are down because of the exchange rate – there's nine dates in 2016, and we're averaging about eight for each, which is about 70 pax.. This year will probably be on a level with 2014".**

> **"South West is one of several UK areas we could potentially increase. But the problem is getting clients to look beyond London".**

> **"The overall business has been growing, so the South West has been keeping pace, but not spectacularly. The more interesting thing is the growing proportion of visitors coming to the UK from the smaller markets in Asia. The Chinese market is currently suffering due to concerns over safety in Europe and also the new visas applications requirement, which means that agents can no longer apply on behalf of travellers"**

> **"There was little demand a few years ago, no interest in the region. Now, a lot of customers are repeat visitors to the UK, many have done London and Scotland, they're bored with sightseeing, and a lot want to visit destinations they haven't seen before - we try to push them out into regions like the South West if the opportunity arises".**

> **"The trend has fluctuated in the period, the low point was 2015 because of the strong Pound, but it should be better this year and next as the exchange rate starts moving in favour of German travellers coming to the UK. Prospects for growth in the South West are quite good, demand is very strong this year, and as long as the tour product develops to cater for changing tastes and demands of the traveller clientele, the outlook is good. A lot of it is about putting more experiences in the product".**

"The region should be more important and we want to build it up. But we don't really know the region very well, so we need people to help build our knowledge. We want to grow it and it's all about the relationships that suppliers create with us. We spend so much time looking for hotels in the region, but if hoteliers were more pro-active, like they are in London, and came and developed a relationship with us, this part of the country would be much more efficient to deal with".

Market conditions impacting on travel demand

- At the same time, business volumes are shaped by visitor trends in source markets, while always at the mercy of extraneous factors such as exchange rates and other economic factors (e.g. oil price decline potentially syphoning demand in some source markets).

"Trend will be determined by conditions in general market, and this year there are less people in each group. The US market is being affected by the presidential election; in large oil producing economies such as Scandinavia and Canada, the low oil price is impacting travel demand adversely".

"Volumes are nowhere near the levels achieved pre-2000, partly because visitor numbers in core markets (eg USA) are fewer. However, the Olympics was positive for business, with rapid growth in the two years afterwards, but that trend has now slowed. The South West is an important component of a UK tour and currently there's enough tours to meet demand. Increased growth is very much dependent on trends in source market visitor numbers".

"It's a fairly stable picture for the South West. Current booking levels to the UK are struggling because of the weakness of the Canadian Dollar. Also, our market relies heavily on spending from savings, and interest rates are very low, which impacts what they have to spend. We're projecting for growth, but that's on the back of developing more specialist themes and attractions. For instance, a walking itinerary planned for 2017 around Bourton in Water; more food experiences and finer dining".

Accommodation issues limiting expansion

- For about one-fifth of respondents, business prospects in the South West are defined by their ability to secure group accommodation at a price and time to suit their schedules. This issue is covered more fully later in the report, but it is clear that accommodation shortages, particularly in Cornwall, are deterring some operators from actively promoting the region.
- Cornwall is such an essential element in many South West itineraries, if there is a blockage in getting accommodation in the county, it potentially jeopardises itineraries that include counties further up the line to the east of the region.

"The South West has reached a ceiling with us because of the accommodation issues. We can't grow because there's a consistent lack of bed stock available to groups outside of Exeter and Plymouth".

"The region is in decline, a few years ago, our business in the South West was triple what it is now. We've been running our Cornish tours down due to the problems faced with accommodation in that area, as well as the bigger tour companies moving in and offering cheaper products. We don't like doing Cornwall anymore; we want to be able to sell it in a good way, not by dropping rates".

"The demand trend in the South West is fairly stable, in line with the general rise in popularity we've been experiencing for the UK. We're always looking to grow all of our business, and that includes the South West. But main barrier is the hotel situation and subject to the attitudes of hoteliers and their willingness to accommodate groups".

"We probably brought about 1,000 pax. into the region in 2015, but growth opportunities are constrained by the accommodation issues in Cornwall. The accommodation issue limits growth potential. This year, Bournemouth, Bristol and Torquay are looking buoyant – we're trying to promote these towns on the back of strong relationships built up with hotel groups in these towns".

"We get requests for Cornwall and Devon but the lack of accommodation at reasonable prices prevents us from promoting the region".

"The South West is an important part of the UK offer. But main constraint to developing the South west is the lack of availability of group accommodation".

"The trend has been pretty stable, and no reason why it should change. The main barrier to developing business is ensuring there is sufficient accommodation. Groups will always want to keep coming to the South West, but the challenge is to get them to stay longer".

Growth through increasing South West content in schedules and itineraries

- While there were few expressions of business strategies that were actively targeting/promoting the region, growth opportunities are still being generated either by introducing new tours featuring the region, or increasing schedules for tours that already include the South West.

"We expect to see more demand for the region because we've put together a new programme, British Fantasy & Fiction, a 3-week UK study tour that includes Bath (Jane Austen Museum), Gloucester (Harry Potter) and Stonehenge".

"We're projecting for growth, but that's on the back of developing more specialist themes and attractions. For instance, a walking itinerary planned for 2017 around Bourton in the Water; more food experiences and finer dining".

"We've been selling the South West as far back as 2001, although the tours back then weren't very popular. The region is probably about 25 of UK total, but could increase depending on the success of the Villages of South England tour".

"We're planning to feature a new/additional Cornwall tour in 2017, with a heavier emphasis on walking, so numbers would be expected to rise".

"We're adding two new tours to the programme in 2017, so these will increase the volumes for the SW. The Marco Polo Country Houses itinerary that will feature 3 days in Cotswolds, while the Connections brand is introducing an off-the-beaten-track itinerary appealing taking in 4 nights in the region. We also expect to see growth in FIT sector, mainly down to the quality of AK's sales consultants and their knowledge".

"The South West is a small part of the total, about 5 -10 . But keen to include the South West on the group touring product which we're developing. This will feature likely feature Torquay, Cornwall, Bristol. Already, newsletters to tour operator clients are pushing these for the 2017 season".

"As a result of being at the Torquay Showcase and fam trip to Dorset, I was surprised at what Dorset had to offer and will be featuring some of its attractions in 2017. I'll be looking at Lulworth Cove, Durdle Door, Jurassic Coast, the Jurassic Skyline, Abbotsbury, Corfe Castle, Swanage Railway and the Hardy Monument".

Growth opportunities in emerging markets

- The research also provided a valuable perspective on some non-priority markets, especially those of South East Asia. About 13 of the sample were Asian specialists, and they provided some valuable insights into how the South West registers in their markets.
- While the gravitational pull of London, and to a lesser extent Scotland (i.e. Edinburgh), is evident in source markets such as China, it is clear that the South West has attractions that have engaged the imaginations of visitors from the Far East. Most notably, the signature appeal of Stonehenge and Bath are clearly vital in generating demand in these markets.
- The message seems clear – the South West needs to create a higher profile for the region in these markets, grow awareness, and understand the requirements in individual markets, while making effective use of mobile channels to reach target audiences.

"The potential is big, but the South West is a tough destination. The opportunity for selling more really comes down to how the region promotes its tourism offer more effectively in the Asian markets we operate in".

"There's a lack of understanding of different origin markets. They're not all the same. Japan is a more mature market, and visitors from Japan tend to be more adventurous, and will take-in culture, gardens, and attractions like the Eden Project. The Chinese market is twenty years behind the Japanese, they tend to only want to go to places that their friends have recommended. Their footprint is very limited at the moment, and there's not much awareness of what the SW has to offer. The Chinese/Taiwanese are very enthusiastic shoppers, and are always seeking British brands to buy".

"The UK is very hot right now, we estimate it will get even more popular with the new visas policy that will make the application process easier. At the moment we only get about one UK request for every ten Schengen".

"The South West has to create more reasons for Chinese visitors to visit and get itself better known out there. The region needs to attract eyeballs, especially on social media platforms such as Weibo and WeChat – the Chinese market is a very mobile market".

"Look for ways of getting the product better known through university and student channels – there are a lot of Chinese students in British universities, and they tend to be very well-off. Many are also involved in exchange programmes. Their parents and friends want to come and visit them. It's a valuable channel because the Chinese are very keen on sharing their experiences, especially through social media. We also get quite a lot of Chinese ex-pats coming on our tours – this is another really valuable channel to target".

"The UK will get more popular with the new visas policy. For returning customers, the new 2-year visa period will encourage more people do a return trip".

"The overall business has been growing, so the South West has been keeping pace, but not spectacularly. The more interesting thing is the growing proportion of visitors coming to the UK from the smaller markets in Asia. The South West will probably get its day, but it's all about marketing and what appears on Chinese TV. The Asian market is very fickle, always looking for the next big thing and new things to do. Every season there's a shift towards some new attraction. In China in particular, if UK attractions get airtime on TV, this can produce a very considerable increased in demand".

2. South West England tourism offer – hotels, attractions, food & drink, access

"Every itinerary we do, we start with the accommodation, and build everything else around it. If we can't get that bit right, we won't do it".

"With hotels in the region, it's like stepping stones….there's only a few you can hit".

Lack of availability governs perceptions of the region

- Availability issues prompted more negative feedback than any other in the survey, being frequently raised as an overriding issue in the absence of any prompting.
- From a group operator perspective, Cornwall is clearly seen as the major bottleneck. For many respondents, the difficulty they find getting suitable accommodation in this part of the region colours their perceptions and attitudes towards the wider region.
- Most feedback clusters around the themes of too little availability at too high a price, and attitudes that are complacent and unsupportive of groups. Few hotels seemingly want to do business with groups, and if they do, it's at unattractive rates.
- The majority of operators in the sample are in the 3* - 4* market, and it is the lack of availability in these categories where the issue is at its most acute.
- The shortage of bedstock means that forward schedules are being jeopardised if operators can't get the space. In Cornwall specifically, it is deterring some operators from basing clients in the county, instead preferring towns in neighbouring Devon such as Plymouth and Exeter.

"There's a big capacity problem in the area, but in all the thirteen years I've been bringing groups to Cornwall, I haven't seen one new hotel opening. Most of the development has been in the B&B sector, especially at the higher end of the category".

"It can be quite challenging finding amenities that have the right mix of character, heritage and tradition. In the St Ives area, it's very difficult finding accommodation that fits the character/heritage/tradition criteria".

"High prices, poor availability, poor quality and poor customer service are the main problems"

"Hotels are an issue which make the SW a tough destination, in particular finding group accommodation at rates we're prepared to pay and for durations that are convenient for visitors. It's at its most critical in peak season. There are capacity issues, especially in hot spots like Bath".

"The reason we don't promote the South West is because of the difficulties finding proper accommodation in the region – we struggle to find rooms in terms of price and quality".

"Availability is a particular problem in Cornwall. We no longer place visitors in the county, instead use Plymouth. Plymouth is as far as we can go, and from there we dip into Cornwall".

"Cornwall availability is very restricted for groups, with bookings having to be made a year in advance in order to secure bedspace. We're looking for 4 nights in Cornwall for a group of 44 starting on June 7th, but can't to place them anywhere in the county".

"From a group operator's stand point the big problem is lack of group-friendly accommodation, especially in Cornwall. In Newquay for example, it tends to be only 2* establishments that take groups. The large hotels in the 4*/5* bracket aren't interested in groups because they know they can sell their space at higher rates. They're seen as not needing the business".

"Low quality, high price and lack of availability for groups at Cornish hotels is the main issue. There are only a certain number of hotels and months that you can bring groups. The situation is particularly acute in popular destinations like Newquay and Falmouth".

"The biggest issue we face is the reluctance of hoteliers (especially south and west of Plymouth) to take large groups. Which is why Plymouth tends to be the stopover on the south west leg".

"The only issue we have in the region, and this is particularly a Cornish thing, is accommodation and the poor value for money many properties offer, especially in high season. We need the flexibility of being an ad hoc operator, but too often we're finding that the big hotels have blocked out their availability to the big operators".

"We struggle to find suitable group accommodation on the North Devon leg of the Cornwall/Devon tour. Even as far out as fifteen months in advance, finding suitable accommodation for 25 people in the Barnstaple/Bideford/Bude area can be really difficult...it's the standard that's not right. In Newquay, there's a plethora of hotels, but we can only get the quality in one or two".

"The whole of Cornwall is a challenge, there aren't enough group hotels in the market. They rely heavily on repeat business. Hotels aren't geared up for bigger groups, and if they are, wholesaler rates being offered are unrealistic, the discounts aren't sufficient for the margin requirements in the supply chain".

"Loyal repeat groups get first dibs on availability, and we can't get a look-in. Many hotels know they can sell just to their domestic market at peak times, so they're not hungry for group business".

Accommodation pressure points elsewhere in the region

- It's not just Cornwall where the main logjams on availability occur. The city of Bath was the subject of much criticism, again lack of availability and high prices dominating the agenda.
- Bristol is often used as an alternative to Bath, although a small number of respondents are now beginning to find Bristol a more challenging hotel market to work with.

"Getting hold of decent quality 3*/4* accommodation in Bath is difficult. Bristol used to be easy, but it's changing, especially at weekends when it's attracting the hen & stag parties".

"Bath is a nightmare".

"Bath is a challenge, with limited availability for groups and high rates. Bristol tends to be used for access to Bath. In Wiltshire, Swindon is a useful stopover, but most of the accommodation is corporate, and hoteliers are reluctant to offer leisure rates during the week".

"Bath is a problem, it's too expensive. The hotel we were using was getting complaints. It was a noisy hotel. Clients think that the whole of Bath should be Jane Austen quaint, but don't realise that it's a real living town. We now use hotels in Wells, which are reasonably priced and more like the small town setting that clients imagine Bath should be".

"With the exception of the Cotswolds, there's a shortage of 5* and high 4* accommodation in the region. In the Summer, hotels are reluctant about working with groups, they're much more interested in individuals".

"There are issues with hotel accommodation throughout the region. Salisbury has been difficult in terms of getting prices and availability for our Salisbury/Stonehenge itinerary. Bristol is difficult price-wise and central Bristol is a no go for the price our market is prepared to pay. Bath is absolutely a no go".

"Last year in Bristol, hotels in the city started reducing midweek availability to groups because of corporate demand, and we're now finding that weekends are difficult because of demand from the weddings market. Now we're using hotels in Newport instead of Bristol – Newport hoteliers are recognizing the squeeze on Bristol and are offering very attractive rates".

"We hardly ever put a group in Bath....groups can't afford the city, or else they're too large. It has all the challenges of accommodating large numbers of people in a small historic town centre. As a result, Bristol has become important for us as a destination".

"Salisbury is another problem, as few hotels can accommodate large touring groups, which means using locations such as Swindon. In Somerset and Dorset, there's just not enough choice - there's lots of country clubs and golf clubs, but these just aren't our thing. The Cotswolds is also difficult, and sometime we have to put groups up in Swindon, Gloucester and even Coventry".

Although for some operators, the accommodation situation is positive

"As a FIT operator with relatively affluent clients, hotel accommodation isn't an issue. We avoid the chain hotels, and go for the boutique hotels that are too small to take groups. Our clients love the Royal Crescent in Bath, especially stepping out in the morning with the Green in front of them".

"Accommodation is great. Use just the one hotel in Cornwall, the Meudon in Falmouth, as a base, from which clients do day trips. Cooperation with the hotel is good, customers love it".

"The quality of hotel accommodation is generally not a problem as we're using chains like Macdonald and Holiday Inn. The only issue with booking is that because of the time it takes to get visa approvals, hotel bookings can be a bit last minute, so hoteliers need to be sympathetic to this".

"Accommodation works well, there's good selection of 5* hotels for FIT groups. Typical prices might be £400-£500 a night in Devon, a bit cheaper in Cornwall. No real issues with hotels, even though often working on short lead times, we find hotels pretty flexible".

Quality of accommodation

- About one-fifth of respondents were also critical of the poor standards in hotels, a common theme being that too many hotels look tired and under-invested. Again, this tends to be mainly a Cornwall-centric issue, to a lesser extent Devon, rather than across the region.
- Some markets appear to be particularly sensitive, notably German-speaking. The general sentiment from German operators is that standards have moved on, their guests' expectations have become more demanding, but many hotels in Cornwall and Devon in particular aren't improving.

> **"Standards in three star rated accommodation tends to be poor quality, lower than the quality that clients are used to for similarly rated accommodation in Germany. Hoteliers don't invest in their properties, standards haven't been getting better".**

> **"The quality of hotel stock is often sub-standard. They don't look as if they've had much investment, they look tired. Guests complain about small rooms, poor standards of cleanliness, tatty carpets, mould in bathrooms. Service standards in hotels can be poor. Too many people working in hotels don't see themselves as being in hospitality. They just see their hotels as a business".**

> **"Too many properties feel run down, and under-invested. Bedrooms are tatty as well as the common areas. Things do get better the further east you go in the region, and you get the sense there's been more investment in upgrading accommodation. These issues are prevalent across the board in Cornwall, especially in places like Penzance and Newquay".**

> **"The only issue is the quality of hotel accommodation. Quite a lot of it looks/feels tired and drab. Too many hoteliers haven't appreciated that the world has moved on and visitors are coming with higher expectations. Guests want better than what they're used to at home".**

> **"There aren't enough decent 3* and 4* properties that will take groups. Too many are below par. The hotel we stayed at in Torquay for the Showcase event was tatty and not really up to the standards that an Italian clientele would expect. Many require an investment to bring them up to European standards. These hotels are fine for the English market, but not good enough for our markets".**

Attitudes of hoteliers towards operators

- There was a frequently voiced perception that hoteliers are reluctant to support group operators and wholesalers, instead preferring to rely on repeat business, often from the domestic market. Small operators complain of hotels favouring only the biggest operators.
- The larger operators and wholesalers are concerned that hoteliers don't understand how their businesses operate and hence are reticent about taking advantage of the opportunities available from doing business with them.
- There were occasional references to a perceived lack of professionalism on the part of some hoteliers in their dealings with the travel trade.

> **"Hoteliers don't understand how we work. For instance if we want to book a group for June next year, we get asked for a deposit; an operator isn't going to pay a deposit this early in the booking cycle, before the selling window has even opened. This kind of practice is especially prevalent in the Devon/Cornwall seaside resorts".**

"Hoteliers need to work more closely with tour operators, work cooperatively with people like us to get exposure in our markets. We do business with 300-400 active travel and tour operators, so a small hotel in, say, St Ives has the opportunity to reach the market as a one-stop shop. They need to understand the costs of distribution".
Jac Travel

"Too many property owners haven't grasped the opportunity to work with overseas tour operators through intermediaries like Circle. Many prefer to remain independent or put their properties on the big accommodation portals. Everyone thinks it's sexy to do it themselves on their websites".

"There are also issues around the idiosyncrasies of accommodation providers in the region. There can be a lack of professionalism, especially in the more rural areas. For instance, property owners take long holidays, which means that forward bookings can't be made. Some of their systems are not up to scratch, for instance booking reservations that shut down at 4.00 in the afternoon".

"This aspect is affecting the reputation of Cornwall in the eyes of tour operators overseas, and there's a growing perception that this area is hostile to group business. We dislike having to deal with requests for groups wanting to visit Cornwall".

"The attitude of hoteliers towards group business is complacent and unsupportive – many aren't interested in groups, they prefer FIT business because they can charge higher rates".

"There's a reluctance to improve the quality of hotels, and negative attitudes towards group business. This is in marked contrast to, for instance, Ireland, where many hoteliers are investing in upgrading their standards. The Irish have learnt their lesson after the recession".

"You can build a good business relationship over several years, delivering £50K worth of bookings a year, and then the hotel owner just turns round and tells us they don't want to take us any more (Hilton Bath)".

"Hotels don't want our business in July/August, and there's an alarming lack of understanding of how a tour operator functions. For instance, many don't recognise that we need to contract across the whole season. Operator schedules are regular, not a one-off".

"There's a lack of availability and anti-group attitude among hoteliers. One hotelier didn't even bother to reply to us. We seem to have a hard time getting people to write back to us after we've made an enquiry. It can take two weeks for a response, even to the simplest of questions".

"In the main seaside resorts, hoteliers want business for 5 nights (Mon-Fri), or the period from Fri – Sun. Which is a big problem for group operators because they wouldn't usually be staying that length of time in any one place. Torquay is particularly inflexible".

"There's the further difficulty of having to make a specific request with an accommodation provider when an itinerary request is being put together. Typically, we can assume an approximate rate and availability at a provider, and write it into the schedule. But very difficult to do this in Cornwall, where each establishment has to be contacted, an enquiry made and price quoted".

"Many hoteliers not prepared to give the rates we think our volumes warrant. In peak season hoteliers put restrictions such as the 2-night minimum, whereas our tours only require the one night".

"The 2-night minimum stay at the weekend in Bristol is also a challenge, as our tours rarely require that long in the city".

"There's a reluctance to allocate space to wholesalers because the nature of wholesale business is that sometimes tours get cancelled. Hoteliers are very wary of this, and it means that wholesalers come lower in the pecking order. For our Cornish itineraries, we're now having to stay in Devon - we have good relationships with hoteliers in Plymouth and Torquay".

Attractions

- These are generally considered many and varied. Some of the largest volume players inevitably rely on the iconic landmarks (Stonehenge, Roman Baths), and a portfolio of the best known castles, gardens, villages, railways and boat trips.
- A couple of respondents noted that the new visitor experience at Stonehenge now takes a lot longer to complete, and this is having an impact on availability of group admissions, as well as creating planning difficulties when it's combined in a schedule with other nearby destinations such as Bath.
- Special interest operators are actively looking for off-the-beaten-track, less touristed, and more authentic attractions, depending on the particular interests of the group. For instance, greater emphasis on private gardens, small churches, remote Dartmoor villages, as well as itineraries with a nature/hiking aspect. Across the board, the region is considered to be well served with special interest attractions.
- There were some references to fewer attraction choices towards the more westerly parts of the region.
- The Rosamund Pilcher effect is never far away when talking to German operators. But while it's been a rich seam of business, there's a sense that it may be running out of steam, especially as the market is becoming commoditised as big volume, low-price, coach operators push out the smaller, more expensive, players. However, operators acknowledge that in the German market, Pilcher is an integral part of the South West brand.
- As a predominantly coach based audience, the choice of destinations may also have to be conditioned by access for coaches. While there is a built-in/realistic expectation that coach access can be difficult, the bigger issue may be for attractions in remoter locations (e.g. organic cider farms, hill top forts on Dartmoor were mentioned) trying to get themselves on tour itineraries if they haven't made provision for coaches.

"The quality of attractions is good and booking them generally straightforward. We usually manage to get them to provide guides and/or experts to conduct the visits. But it's got more difficult at Stonehenge, where, since the new visitor centre opened, the trip now requires two hours instead of half an hour. This means the attraction isn't taking as many groups as it used to".

"There's tons of attractions. The bigger task is weeding out what I don't want".

"Attractions in the region that cater for our clients' interests are very good, and there's no shortage of walks for clients".

"Attractions work well in the South West. Seem to be plenty of gardens, castles, boat trips and railways".

"Our main attractions are Stonehenge, Roman Baths, and Fashion Museum in Bath. They're easy to work with because they're focused on the travel trade".

"Our students love the natural beauty, the Britishness, the Cornish pasties, the fish and chips and the cider. There's also a fun factor around the region, and the weather is warmer than the rest of the country – venues like the Eden Project and the surfing schools in Newquay make a big hit".

"The attractions are great. There's a lot to do. The region is so beautiful, with lovely areas to visit. Across the whole area there's lot's to see, gardens, manor houses, castles, countryside, villages. Prideaux, Lanhydrock, St Michaels, cream teas, Stonehenge, Bath, Rosamund Pilcher, Agatha Christie and King Arthur all play very well in our markets".

"The attractions are fantastic. The region offers it all from food and drink to unique gardens. Gastro attractions are a big potential opportunity for the region and to give it stand-out appeal. Ireland has done this very effectively. Perhaps there's scope for thematic routes, for instance Jane Austen".

"It can be complicated for FIT in terms of getting travel trade rates. Attractions in the region that won't offer FIT rates similar to those enjoyed by groups. Merlin is an example of an attraction group that knows how to work with FIT, but many attractions in the South West don't".

"Cultural attractions are generally plentiful across most of the region, although the further west you go, there's less options. Cornwall for instance doesn't have the cultural attractions of Bath and Bristol, but it makes up for it with its landscapes".

"Attractions are very good, but many are under promoted, and visitors have little appreciation of them (e.g Heligan)".

"With attractions, going farther west, an operator in these markets and their interests has to go further to find good places to visit".

"Attractions need to promote themselves more effectively to create more interest among Chinese visitors – for instance King Arthur and Round Table".

"The region's history and heritage are great; the venues are great. But we're concerned that the new visitor experience at Stonehenge has upset schedules – you can no longer do Bath and Stonehenge in the same day, and this is having an impact on planning itineraries".

"There are opportunities for more evening entertainment options. There's too much reliance on medieval banquets. There's a lack of places where guests can eat and be entertained. Because the German and French do these things very well, they expect it when they come to the UK. Also, a lack of reasonably priced dinner venues outside the main cities/towns".

Food & drink

- The gastronomy/cuisine in the region is typically expressed in favourable terms. While garnering high praise from a small number of respondents, the more general sentiment was around the region's food and drink being unexceptional, and generally seeming to match expectations. There were some isolated quibbles about poor quality hotel food.
- The region's specialisms such as cream teas, Cornish pasties and cider get mentioned and these seem to resonate quite strongly with visitors. It is essential to ensure that the quality benchmark in these items is maintained.
- Pubs in the region are also well regarded, with a number of operators featuring pub dining as an essential element of their itineraries.
- Asian visitors sometimes prone to struggle with the cuisine and how it's presented, but this probably isn't exclusive to the South West.
- The South West's food provenance, and its organic offering were seen by a couple of operators as a useful basis for developing the wider gastronomic appeal of the region.

"The food in the region is generally well received, and sometimes guests are surprised by the choice and quality available in hotels. But it really comes down to individual hotels and sometimes a group will come across some poor quality food".

"Food isn't a problem. The tour price includes breakfast, and students make their own arrangements in the evening. All the well-known chains, the kind of food that students like, are available in places like Bath, so most students comfortable with food options available".

"Given the nature of tours (on the road touring), and the elderly client base it attracts, it's important to plan regular stops, especially afternoon tea which is seen as being a quintessential element of Englishness. There is a lack of good amenities on the main roads to cater for this need. The drive from Wells to Dartmoor is particularly poor in this regard".

"Although Asian clients want to sample local cuisines, they also want to be able to eat their own native cuisines. They all need rice. Culturally, as well as wanting food that tastes good, Asian visitors also pay particular attention to how it's presented. Some of them don't like the way that dishes are served on one plate – they prefer it in separate dishes".

"Finding good quality restaurants that want to handle groups is a problem, and although Asian visitors are beginning to hear about celebrity chefs, often the booking lead times in their restaurants are just too long for groups. Also, quite a lot of them seem to be quite anti-groups".

"Food and drink are always great. The culinary base is very appealing, especially with its range of organic farms. Restaurants are good too".

"Food and drink is very good. Our tours feature a lot of pub dining and we use some great pubs across the region like the Queen Victoria in Wells, West Country Inn at Bideford, Moat Inn in Port Isaac, Falcon Inn at St Mawgan".

"Food and drink are very good – tours are normally on a half-board basis, so main meal tends to be in the evenings at hotel. We don't get any complaints. Germans love the pubs in the area; visiting pubs is always a big plus for German visitors".

"In the South West it can be difficult finding Chinese restaurants, so quite often guests are having a bigger proportion of local foods than is ideal".

"The food and drink offer is exceptional –the farm to table quality, the artisanal chefs, the local produce, the region has a lot to offer".

"Food and drink in the region is well regarded - our customers (predominantly Russian) tend to like big portions, a lot of meat and lots of alcohol! Pubs are very popular and there's a good choice".

"Food and drink generally quite good, but more variety would be welcome. The food choices in the standard group hotels can be limited. There's an emphasis on chicken, chicken, chicken….choice should be wider. Cooking differently has nothing to do with more money, it's all about more imagination".

"Don't underestimate the importance of cream teas, the Chinese are willing to make a long excursion just to get a cream tea. But these can leave a lot to be desired, and some of the regional examples fall far short of what is available in London".

Access to and in the region

- Three operators highlighted the lack of direct flights into the region from continental Europe and Asia. Clearly there are operational constraints at the region's airports that limit aircraft size, but for Asian visitors in particular, onwards travel by train from London can be a deterrent.
- Two operators were critical of regional train operator, Great Western, and its reluctance to offer group rates.
- Once in the region, coach based tours are having to contend with issues of access. Most recognise that this is an inherent feature of the region, and build these limitations into their itineraries, or else they delegate the issue to the coach operator contracted for the tour.

"Access to the region is a negative factor. There are no direct flights from Asia, and many clients don't want to take the train from London. We can't get favourable rates on rail tickets either, which is a further disincentive to use this means of transport".

"Access and transport are all rated well. Would like to be able to use more direct flights into the region (eg Exeter and Bristol), but either the links aren't there or the small-capacity aircraft being used makes it difficult getting allocations for groups".

"The lack of direct flights from Germany to Bristol is a problem. All clients for the Cornwall trip arrive there, but because of the lack of direct flights, many tend to fly into Amsterdam, and then take an onwards connecting flight to Bristol. With the new Cornwall trip we're planning, we need to take a look at what Exeter and Newquay can offer".

"Great Western doesn't offer rates that are economical for groups – is this an area where the tourist boards could have some influence?".

"Access generally isn't an issue, and itineraries in the region have to be planned around where coaches can get to, which sometimes means having to strike off certain attractions that are featured in the Rick Steves Guides. For example, Gidleigh Stone Circle on Dartmoor and the Chysauster Ancient Village".

"The road network is improving (e.g. upgrade of Taunton bypass), but there are always issues around access to small villages and attractions by coach parties. Some places are better than others, for instance Dunster in Somerset just gets it, but several don't acknowledge the difficulties that customers may have getting around".

"Access and getting around can sometimes be a bit of a problem because of the long distances involved. It puts more onus on the trip planner to have to break journeys and devise things to do around those stops".

"Access can be an issue with coaches. Two of the attractions we saw on the Dorset fam trip - Hardy's Cottage and the Smugglers Cove Restaurant at Osmington - it's impossible to get a coach in there and reverse it".

3. Marketing, branding and promotion

This section assesses the responses of the sample to issues around the promotion of the South West region and its engagement with the trade. While there is a lot of emphasis on the past and present status of the region, respondents were also very forthcoming about what the region needs to do.

Out of the sample of 33, sixteen claimed they had no dealings with regional DMOs in the pre-screening email survey. Of the remaining seventeen, and generally reflecting the distribution of visitor activity in the region, Bath (8) and Bristol (7) registered the highest levels of engagement. These were followed by Cornwall (6); Cotswolds/Forest of Dean (6); Wiltshire (5); Somerset (4); Isles of Scilly (3); Devon (3); Dorset (1).

Creating a more effective marketing voice

- About one-third of the sample questioned how effectively the South West region is being marketed in overseas markets. This was particularly evident in the case of operators in Asian markets.
- There were references to the dominance of Bath in the marketing landscape of the region, to the extent that it almost the signature brand for the region. A task for the region's marketing is how to harvest the very considerable asset that Bath is, and how the rest of the region can capitalise on its gravitational pull.
- The region also needs to contend with the impression that it is fragmented, and lacking a cohesive voice that speaks for the South West as a whole. Several respondents noted that the marketing and promotional effort needs a collective effort.

"The South West is a latecomer; it's been staying quiet while other regions such as Lakeland and The Midlands have been more actively promoting their regions in our markets".

"The South West isn't doing a good job getting itself on the map. The marketing is weak. It needs to be making more noise in our markets to get more brochure space".

"With destination promotion to the Chinese market, you've got to show people why they should come. We need much more information from the boards, and of course fam trips are very effective".

"The Chinese are attracted by big events, but we don't get to hear about them. Traditional events are a good way of driving demand, for instance the Balloon Festival in Bristol and Fireworks Festival in Plymouth. In the Chinese market, tourist boards need to really exploit the social networks and understand how to reach the Chinese through channels such as students and ex-pats".

"Tourist boards looking to grow the Asian markets must be active in-market – you have to be out there presenting yourself to suppliers. The Swiss do this very well, especially the way that mountain railways are very active among agents in China".

"Bath is on its own, the rest of the region needs to market itself much more effectively to overseas audiences. In particular it needs a stronger collective voice overseas, rather than the individual bits promoting their own corner. The marketing needs a linked message, and the development of strong themes that bring the region together".

"The awareness of the region is inevitably around its main attractions, which means The Cotswolds and Bath. Bath is the brand. So, promote the South West by promoting Bath and The Cotswolds, and everything else hangs of the back of these. It's essential that these main regional attractions form the core of the marketing, rather than trying to hang a promotion around small attractions like the Minnack Theatre".

"Everyone needs to work together to push the South West to our markets – tourist boards, hoteliers, airlines and railways, but they need to prioritise their main targets and ensure they've understood the unique requirements of visitors from each market. Work harder to encourage more visitors to come to the SW during low season. Why promote it when capacity is full? – when we try to book accommodation, we find we can't get it".

"The South West needs to raise its awareness, profile and brand. There's a whole bunch of counties and boards that need to come together with a clear vision and strategy. Collectively, it needs to decide what it wants to achieve, what its objectives and outcomes are, and how it delivers these – and it needs to involve the UK travel trade, the international travel trade, it needs to look at financing and how to promote the region effectively, especially in mature markets like Italy and the US".

Engaging with the travel trade

- Responses from the sample indicate that there's an opportunity for the regional DMOs to implement considerably more engagement with the travel trade. Several operators suggested that regional boards were low key, or that they were generally aware of their existence.
- Operators and wholesalers in the sample were almost universally receptive to more productive relationships with the boards. It was very evident that different operators and the personnel working with them are on different levels of the knowledge curve. While some clearly possessed an at times granular appreciation of the region, others had a very limited knowledge beyond the main attractions and destinations – for instance one respondent being unaware of the existence of the Isles of Scilly until attending the Cornwall fam trip!
- Several respondents observed that when they're servicing a client request, they have considerable influence on the choice of final components of an itinerary, but they need the familiarity and knowledge of the region. With such a knowledge gap, it means that the opportunity for the wider region to get onto itineraries is missed.

"We don't hear anything about the South West, or from the individual boards in the region".

"I don't use any of the DMOs in the region – they certainly wouldn't be my first port of call; at most, if I had an enquiry about a hotel or somewhere to eat I might go to them".

"We don't work with any of the tourism boards – we're not aware of how they work".

"We don't work with any of the boards, I wasn't aware of their existence. They're difficult to find, I didn't even know there was a Visit Cornwall. They need to be more visible. I've been to VB events, but don't recall seeing South West tourist boards represented".

"The local tourist boards are very quiet. Apart from going on a fam trip with VisitWilts last year, I don't generally have any dealings".

"I don't feel I've needed to have contact with DMOs in the region, but I'd like to know more about what product there is beyond the usual well known destinations".

"Too much of the South West isn't on our database because its marketing is low key. I'm in charge of sales, and if any region hasn't promoted itself, it doesn't get onto the database. I'd like to be included on more fam trips and was disappointed that the recent Cornwall fam trip was only available to FIT operators".

"The Torquay Workshop was very useful. Being specialized means that we're always looking for new and interesting things in the region. The south West needs to carry on building the momentum, because up to now it's been very low key".

"We need to meet them more, tell us about things we can market – we need a knowledge base, especially of hotels that can accommodate groups. We'd like to meet more of the boards in the region because we don't know the geography well....help at the end of the line in the shape of personal relationships are so valuable for building business. Outside the UK, no one is marketing these locations. They've got all this funding, they need to get on a plane".

"They should be working closer to tell me more about itineraries, attractions and accommodation. I'm always happy for the boards to contact me. The SW boards need to be doing more campaigns to build knowledge, perhaps in the form of promotions and fam trips. Other boards have done breakfast presentations, and these can be very effective, especially when based in London".

"The region needs to get its name out there, get along to trade shows like BTTF (formerly BOBI). It needs a presence. Their websites need suggested itineraries for groups, too often they're designed with individuals in mind".

"Some of our operator clients in the French and German markets would benefit from fam trips to the region. You can Google and search, but you need to see it. You want to find out about hotels and attractions that are on the up".

"The boards need to be more creative, developing new ideas and new things to do, particularly experiences. Too many rely on the standard places. Their thinking should be more about 'what's around the corner?' For instance, more focus on local gastronomy, food and wine experiences, cooking classes".

Resources & Education

- About one-quarter of respondents gave suggestions as to how they could find the regional tourism boards more useful. Some of these were around better digital resources to facilitate easier and more convenient searching of hotels, attractions and itineraries.
- Elsewhere, broader views were encountered from a couple of operators about the educational role the boards could undertake to better inform suppliers about the opportunities for working with tour operators, their modus operandi and the contribution they make to the wider local economy.

"Websites need to feature trade sections that are relevant for groups, as often they just provide a platform for links to suppliers. They need to help operators decide where to go, where to eat, who is coach friendly, who makes it easier to book, catering advice, really good places where groups can stop for food and coffee. Fam trips are really valuable as I need to see things for myself. But I don't know how to get included on these".

"Suggest that tourist boards need to be doing more to get themselves in front of the travel trade, by using technologies such as webinars".

"The most useful role DMOs can play is having relevant information available on their websites. Previous experience elsewhere has been disappointing because enquiries can take a long time to get a response. The nature of our business model is that when we get a tour request from an agent, we're competing with other DMCs, so an FIT group needs a response time of 48 hours. In our experience, DMOs don't appreciate the urgency of responding quickly".

"We need easy information from their websites, hotels and attractions in particular. And with the various problems around getting hotel accommodation, some kind of directory (preferably online) of hotels that are prepared to work with groups".

"Their websites need to feature travel trade sections featuring itineraries, attractions, anything that might help us to nudge customers in the direction of additional attractions as well as the best known ones….for instance Old Sarum as well as Stonehenge. Often groups don't know what they want to do, so we have the chance to influence them".

"We need to meet them more, tell us about things we can market – we need a knowledge base, especially of hotels that can accommodate groups".

"The region needs more availability of bedstock, ideally small units of high quality. Not big complexes. Getting property owners to understand how to work with tour operators. Higher levels of professionalism among property owners. Ensuring that the tourism offer in the region remains high quality, high value – we don't want Shearings coach parties eating egg and chips in the evenings".

"They've failed to recognize the economic impact and jobs that overseas visitors bring to the region, and display a definite preference for domestic tourism. Because they've got an established domestic tourism sector, they don't seem to be aware of what they need to do attract more foreign tourists. DMOs need to be educating suppliers about the economic benefits of international visitors".

Experiences of dealing with the regional DMOs

- The largest number of accolades for the regions DMOs were reserved for Visit Bristol and Visit Wilts. Bath and the Scilly Isles were also mentioned.

"We've worked with Visit Bristol, who were very supportive. Went on a fam trip with UK Inbound and subsequent trade fairs. Visit Bristol have tried to put the message out there that if you want to work with overseas markets, work with us".

"Visit Bristol have been helping with the large tour group we're bringing over from California next year. We were very impressed with what we saw on their fam trip. They've been brilliant, they're easy to work with, and they've taken us seriously and genuinely seem to want to help us deliver the best experience. That's great for a small operator like us, they seem to treat everyone the same".

"I'd rate Bristol very highly, who did a 2-day trip with the sales team. They invested money in getting us to understand their market, and have been very pro-active since, keeping us informed of new opportunities in the city and region".

"The Visit Wiltshire fam trip was very useful. I've put together 2/3 groups as a result. Visit Wiltshire is very pro-active".

"Visit Wilts have been very good. I've been on fam trip, and they helped create an itinerary that includes Stonehenge, behind the scenes at Salisbury Museum, and a tour of the Wiltshire Museum".

"We have a good relationship with Visit Wilts, and Flo is very much on top of us".

"We had some recent dealings with Bath Tourism. They were very good, gave us suggestions for the fashion trip and offered a tour guide. I also attended the Bath fam trip which was very useful".

"Bath just gets it. Cornwall is in disarray because of the reduction in funding resulting from pressure on local services. Devon is shocking. The individual regions don't talk to each other and are too busy protecting their own small area, which is a failure to understand how a visitor behaves. They travel across boundaries, and don't confine themselves to one small area".

"We've been working with the Scilly Isles board to help kick start offers for the Karma St Martins, especially in an effort to demonstrate that the Scillies can be accessed easily from the mainland. We've received good support".

Examples of best practice elsewhere

- In terms of other UK regional DMOs, the standout example of best practice seems to be Visit Kent, which received unprompted praise from four respondents. The hallmarks of their favourable perception appear to be high visibility, pro-active approaches in-market, and keeping operators informed about the region with regular communications.
- Elsewhere in the UK, the tourism boards for Liverpool, Lake District, Yorkshire and The Midlands, received individual mentions. Also, about 10 of the sample tended to rely on their relationships with Visit Britain and Visit England to keep them informed about the region.
- Beyond the UK, there were two plaudits for Failte Ireland/Tourism Ireland and their development of the Wild Atlantic Way, and more recently Ireland's Ancient East. These initiatives were considered model examples of how to bring a region together, create a theme around it, simultaneously collaborating and engaging the travel trade in its development.

"Visit Kent is the gold standard. It's a very active destination....they're very out there, very public, and very pro-active abroad. They're very good at keeping partners informed with newsletters and regular updates. They'll also call you to see how things are going. Yorkshire and The Midlands are also very pro-active and work well with trade partners".

"Visit Kent are always at VB events. They've been very helpful, they've helped with selecting coach companies".

"In best practice terms, Visit Kent are very good – they've visited Jac clients on the continent to present the Kent region. Also, the Lake District is particularly active in international markets".

"We met Visit Kent at last year's WTM. Gave some ideas about the kinds of experiences they'd like to feature - since then they've been very helpful".

"Visit Wales have been very proactive and particularly responsive to enquiries about hotels".

"We don't work with the local tourist boards as we have a relationship with VB, who can usually address anything we need to know about the South West".

"Visit Britain is very good to Canadian buyers. They've taken us on a few fam trips; I direct call suppliers afterwards, so I haven't really had to go to VB for further help".

"We mainly deal with VisitBritain and VisitEngland, both of whom cover the main SW attractions pretty well".

"Liverpool is an excellent benchmark about how it can be done, now reaping the benefits and out-performing Manchester. York similarly is a good example. In Ireland, the Wild Atlantic Way is a very collaborative project that involved Failte Ireland/Tourism Ireland. Failte Ireland is the model. South East Ireland Way is seeing similar levels of collaboration as seen for Wild Atlantic and they're already talking to us about 2017/2018".

"The standout tourism board is Failte Ireland – look at what they've done on the West Coast and they're now repeating it in the east. At a macro level, they're drawing services, attractions and regions into a common theme and putting a brand wrapper around it. The South West is miles behind Ireland. Scotland is another good example, it has a clear brand. The South West just doesn't have that".

Section 2: Trade Email Survey

Introduction and survey method

A second stage email survey was undertaken to boost the response provided by the first stage qualitative study. This comprised a shortened version of the discussion guide used in the qualitative study, consisting of mainly open ended questions supplemented by a rating of the various aspects of the region's tourism fabric and amenities.

The sample

- Tour operator companies who form part of ETOA – the European tourism association's membership
- Attendees of Showcase South West (a B2B networking event in the region, which took place in February 2016)
- Contacts from a number of VisitBritain's overseas market offices.
- In total 1,897 contacts were contacted by email.
- The survey generated a response of 34 completed interviews, and a further 11 partially completed, a total response rate of 1.9 .

The questionnaire

Q. When we refer to South West England, we are including the counties of Cornwall, Isles of Scilly, Devon, Somerset, Bath, Bristol, Gloucestershire, Wiltshire, Dorset and Devon. Looking at your current tour offering, which tours feature South West England?

Q. In terms of the customer mix, which are the main geographic markets for tours featuring South West product?

Q. Do your tours to this region of England attract a particular type of customer (age/income/specific interest group)?

Q. How many pax. are you bringing to South West per annum? Are you featuring more/less South West tours than five years ago, and if so, by how much? Do you see potential for growth? Please provide any details that you think relevant.

Q. How important would you say that South West products are in the company's overall tour offer? What would encourage you to feature the region more strongly in your product offer?

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Q. Thinking specifically about the region's tourism fabric and amenities please rate them:
– Accommodation
– Visitor attractions and experiences
– Region's food and drink
– Access and transportation

Q. Please provide any comments to support your rating of the fabric and amenities.

Q. Please select the regions where you have experience working with suppliers.

Q. What is your experience when working with individual suppliers from these counties/districts?

Q. How does doing business with South West suppliers compare with other regions in the UK?

Q. Do you work with any tourist boards from counties in the region? If so which?

Q. Are there particular strengths/weaknesses among the Tourist Boards in the regions?

Q. What could they be doing better? Do you have any examples of best practice from other destinations across the UK & Ireland?

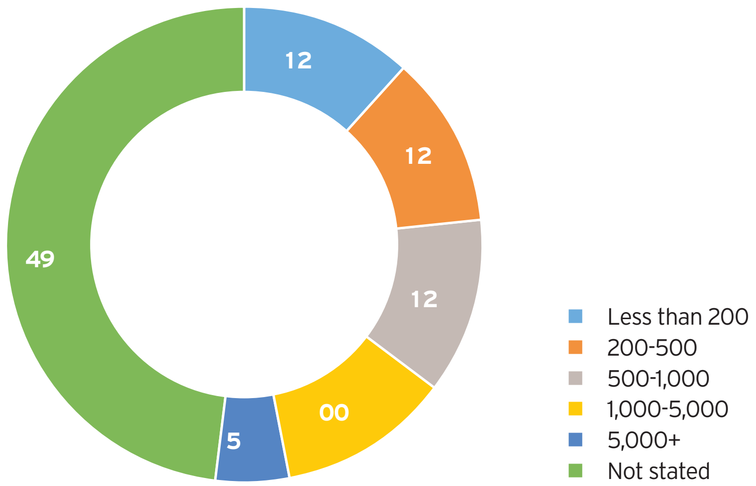
Sample profile by pax. volumes and source market

Q. How many pax. are you bringing to South West per annum?

Among the sample able to give figures on their volume activity in the region, just over two-thirds are generating numbers of up to one thousand pax. a year. At the opposite end of the spectrum, the sample included two respondents bringing in substantial volumes in excess of 5,000 pax. a year.

While it is not possible to say how representative this volume profile is of the region overall, for the purposes of the survey, the skew is clearly towards operators with relatively small volumes visiting the region.

Figure 1: Volume of passengers to the South West



In the less than 200 pax. segment:

- Respondents reported a mixed picture in terms of trends and outlook.
- Their markets are predominantly European, but the South West region tends to be relatively unimportant as well as being difficult to sell on its own.
- This group had the most favourable impression of the accommodation situation.
- In terms of its geographic reach, this tends to be more extensive than the norm, with a considerable footprint in Devon and Cornwall. Significantly, this was the only group to feature the Isles of Scilly.
- None work with regional tourist boards.

In the 200-500 pax. segment:

- A mixed picture in terms of trends and outlook, and also in terms of the region's importance.
- The main source markets in this group were European, and the majority sell the South West as part of a wider UK package.
- Accommodation registers reasonably well with this group, typically around average/strong.
- This is quite a city-inclined sub-sample, with all respondents in the category featuring Bath, and the majority Bristol, with each of the counties attracting about one-half of the sample.
- None work with any of the regional boards.

In the 500-1,000 pax. sub-sample:

- While the region is considered relatively unimportant, the sentiment around trends and outlook tends to incline towards the more positive end of the scale.
- The market profile was mainly long-haul, with The Americas featuring most strongly, as well as Australia/NZ.
- Accommodation tended to be viewed as average/weak. Bath is the dominant destination.
- None of this sub-sample works with the regional boards.

In the 1,000-5,000 pax. segment:

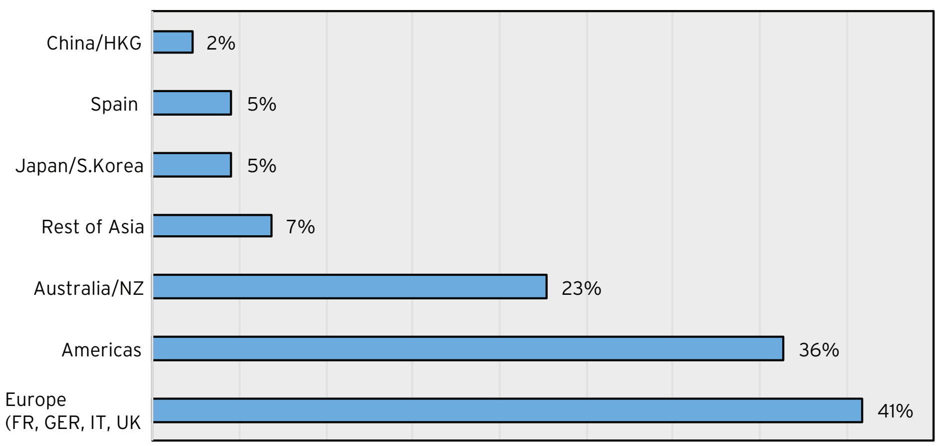
- The market profile is drawn primarily from Europe and The Americas.
- The region tends to rank fairly low in terms of importance while business prospects are generally mixed.
- The South West is always packaged with other parts of the UK and Europe.
- Accommodation is rated as average/weak.
- Geographically, Bath is the main destination, while Bristol and Cornwall are also strongly represented.
- This sub-sample reported the only notable experiences of working with the regional tourist boards.

At the top end of the size spectrum (5,000+):

- Two respondents reported mixed business prospects for the South West, although the region is regarded as fairly unimportant.
- The region is sold both as a wider UK package and also as a standalone.
- Given their large volumes, these respondents reported the widest mix of source markets, covering Europe, The Americas, Australia/NZ and South East Asia.
- Again, the high pax. volumes means a more comprehensive penetration of the region, with both respondents featuring Bath, Bristol, Cornwall, Devon, and Wilts.
- Neither works with regional boards.

Q. In terms of the customer mix, which are the main geographic markets for tours featuring South West product?
For 45 of the sample, their main source markets were European (i.e. France, Italy, Germany, UK and Spain). This geographical segment of the sample tends to skew towards smaller volume operators with pax. numbers of less than 1,000. In terms of its geographical reach, it is the most extensive, with operators in these markets doing business in an average of 5.8 of the region's cities/counties (vs. all sample average of 4.7)

Figure 2: Source market profile of sample



Long haul markets were also strongly represented in the sample, with about one-third of respondents specialising in the The Americas, while almost one-quarter identified Australia/NZ as their main market. Among American specialists, Bath is a more prominent feature than it is for European markets. Generally, their geographic footprint is smaller than for European markets, with respondents specialising in these markets doing business in an average of 4 areas. For operators specialising in the Australian market, there is a more pronounced representation of FIT operators than seen in the other main markets. Their geographical reach is similar to that of American operators.

The remaining 15 of the sample were mainly engaged in the Far East, in the emerging markets of South East Asia and China, as well as the more established Japanese and Korean markets. The distinguishing feature of these markets is that their geographic footprint is very limited, with operators doing business in an average of 1.6 cities/counties in the region.

Areas of the South West featured by sample

Q. Please select the regions where you have experience working with suppliers

Bath is quite clearly the most popular county/city destination among the travel trade sample, with 57 saying they did business with the city's suppliers. If this figure is re-calculated to remove the non-response sample, it increases to 85.

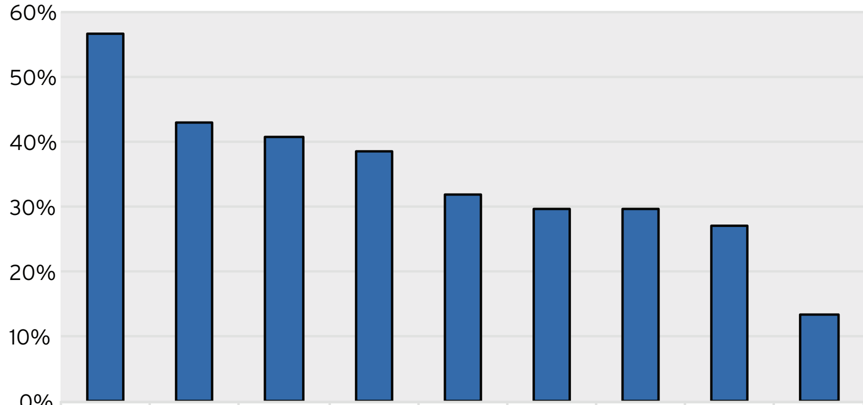
Bristol (41) is often paired with Bath, frequently being used as an overnight stopover due to the availability issues in Bath. Nearly 60 of the responding sample feature both cities.

Beyond these two city destinations, Cornwall (43) and Devon (39) are the two most popular counties, each attracting about two-fifths of the sample. Because of their neighbouring geography they too are often paired, with 85 of the sample doing business with Cornish suppliers also operating in Devon. Again, evidence from the qualitative survey indicates that operators are reaching into Cornwall from accommodation bases in Devon.

Towards the eastern end of the region, Wiltshire, Dorset and Somerset engage less strongly, typically with suppliers from each active with about 30 of the sample.

In the furthest south west, 14 of the sample is doing business in the Isles of Scilly

Figure 1: Geographical profile of the sample



	Bath	Cornwall	Bristol	Devon	Wilts	Dorset	Gloucs	Somerset	Isles of Sciliy
%sample	57%	43%	41%	39%	32%	30%	30%	27%	14%

Among the sample that answered the question, the average number of areas they do business with was 4.7. Operators doing business with only 1, 2 or 3 areas gravitate mainly towards the Bath, Bristol, Cornwall axis, and feature The Americas and Australian as their main markets. This suggests that tours appealing to long-haul visitors tend towards UK wide itineraries which skim a relatively few main sights/destinations in the South West region.

As the geographic footprint increases, it is noticeable that the source market profile starts to edge more towards Europe, so that among operators that are doing business in 7, 8 or 9 areas, their main markets are European. The lower penetration of long-haul markets for operators with these bigger geographic footprints may also reflect the fact that large parts of the region are relatively unknown, a theme that emerged quite strongly in the qualitative survey.

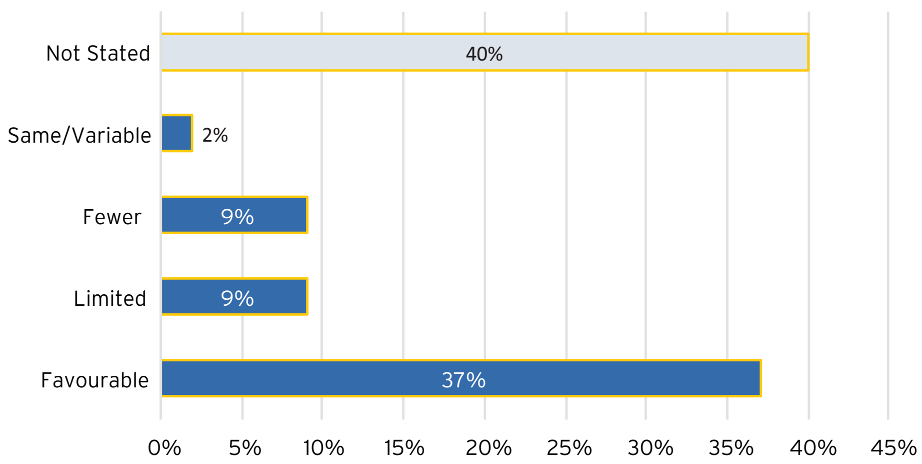
Business trends and growth prospects

Q. What potential for growth is there? Are you featuring more/less South West tours than five years ago, and if so, by how much? What has been the trend for the last 5 years, do you see potential for growth?

Among the 60 of respondents that expressed opinions about the region's business climate, the majority sentiment tended to be a broadly positive one, with well over one-half giving opinions that could be described as 'favourable'.

Towards the more negative end of the scale, about a third of the responding sample offered perspectives on the region's business climate that can be viewed as either 'limited' or 'fewer'.

Figure 2: Trends and prospects for the South West region



Sentiments that are labelled 'favourable' were fairly evenly distributed throughout the sample, with an absence of any substantive defining characteristics among respondents. While there was an over-representation of (1) operators serving long-haul markets and (2) those with volumes in the 500 - 1,000 pax. range, these were not sufficiently significant to be considered attributes of a group that is more favourably disposed towards the region's business climate and prospects.

As with the qualitative survey, those respondents expressing more negative views were inclined to link these with accommodation issues, and the disincentives that shortages of reasonably priced accommodation mean for increasing business volumes.

The table below gives a sample of verbatim feedback from respondents for each category of sentiment.

Favourable 37 of sample	**"Due to popular demand within the last couple of years we have introduced a dedicated South West section in our brochure with the option of tailor-making additional itineraries that are not listed. This is a jump from 0 - 100 within the last 2-3 years"** **"We are definitely featuring more tours to this region than 5 years ago"** **"There is certainly potential for growth as we are working on new itineraries for our next brochure"** **"More - about 5 time more than 5 years ago!"** **"Growth planned for 2018 season providing hotel rates are achievable v budget and euro gains strength against GBP".** **"We bring c12000 passengers to the South West per annum. This is more tours that 5 years ago and continues to increase year on year by c800-1000 per year"**

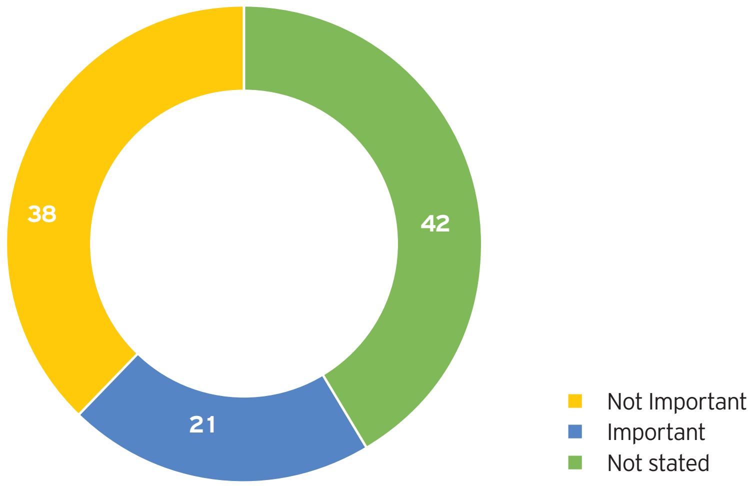
Limited 9 of sample	**"We do not see potential for growth unfortunately. Most of our groups want to visit Stratford-Upon-Avon, the Lake District, York and Scotland. We include day trips to the West Country (Wiltshire and Somerset mainly) in a few itineraries, but few of our groups actually overnight there"** **"We do not see potential for growth due to the low capacity in terms of accommodation and the rate increase propose year after year by hotels the region"** **"No potential for growth as there isn't sufficient accommodation of a required standard, that is willing to accept group business all season (April - October), plus there isn't a great deal of specific demand for us to warrant adding tours to the region".**
Fewer 9 of sample	**"..have reduced the number of tours featuring the South West due to economic situation and weak euro v GBP"** **"We bring about 1000 persons over per year. It has been a little more 5 years ago be cause the region was a less expensive then as far as hotel accommodation is concerned"**
Variable 2 of sample	**"We run bespoke ad hoc tours, so it varies tremendously from one year to another. Some years it will be in the hundreds, other years more, others less".**

The importance of the South West in the overall tour offering

Q. How important would you say that South West products are in the company's overall tour offer?

Given the weighting of the sample towards operators with relatively small pax. volumes in the region, it was perhaps not surprising that respondents considering the region as 'important' were less evident than those seeing it as 'not important'.

Figure 3: Importance of the South West Region



Respondents who considered the region to be 'important' were more strongly-represented among (1) operators from the FIT business category; (2) those whose main markets are Australia/NZ. More significantly, their geographical spread is greater than that seen for the 'not important' sub-sample – Bath is present in the schedules of almost all of this sub-set, while Bristol, Cornwall, Devon and Gloucestershire also feature very prominently.

Those in the sample whose views about the South West region suggest it is ‘not important’ were strongly represented among operators with the smallest volumes (i.e. <200 pax.) as well as at the other end of the scale those in the 1,000 – 5,000 bracket. They’re also inclined to adopt a less favourable view of the region’s business climate and prospects. This sub-sample is also quite strongly weighted towards operators that are packaging the South West with other areas of the UK/Europe, while spread evenly across the source markets of Europe and The Americas.

The table below gives a sample of verbatim feedback from respondents on the importance of the region in their operating portfolio.

Important/very important 21 of sample	**“It is definitely important as it is an great part of the overall offering for England and Britain”** **“Very important, World Heritage sites, Stonehenge and Royal Crescent in Bath. Plus Rural scenery in Cotswolds”** **“Bath, Cotswolds and Stonehenge are essential”** **“South West itineraries are quite popular due to their close proximity to London”** **“In our U.K./Europe brochure it is one of our biggest selling tours”** **“Bath and Stonehenge are very big attractions for American visitors. Devon and Cornwall are a bit far and difficult to include in our 8 to 10 day itineraries”**
Not important 38 of sample	**“This region means only 0.4 of our total operations. We don't have plans to grow in this region”** **“South West is not too much requested by clients, they are more interested in Central England and Scotland rather than South West”** **“For the overnight tours the area is not essential. We focus more on Scotland, Ireland and specific locations in England such as Liverpool, York, Durham etc..”** **“They are not important, but not significantly as the 100 PAX. mark is too low considering we have served more than 40,000 B2C clients in past 6 years now!”** **“..to be honest, regarding our other English destinations, South West does not play such a big role, as the transport to the region as not as easy as the access to south eastern part with London, Canterbury, Brighton, Cambridge...”**

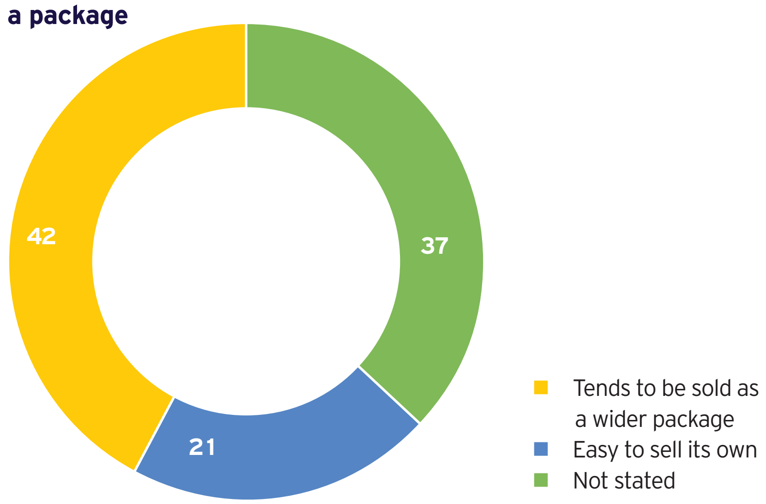
Selling the region as a package or on its own

Q. How easy is it to sell the South West on its own? Is it easy/difficult to package with other regions of the UK?
Of those responding to the question, about one-third stated that selling the South West on its own was easy. This sub-sample was strongly comprised of operators whose main markets are European, suggesting that in long-haul markets, the default tends to be the South West with other parts of the UK.

Where operators consider the South West is easy to sell on its own, they tend towards a more favourable view of business trends and prospects; in addition, a larger proportion view the region as ‘important’ rather than ‘not important’. In terms of geographical reach, those active in standalone South West itineraries also seem to penetrate the region more comprehensively. Typically, Bath dominates the schedules, while Cornwall, Devon and Dorset are also strongly represented.

Among the sample that considers the South West has to be sold with other regions, the key differentiator appears to be market based. In this sub-sample, there was a pronounced skew towards American source markets, as well as Australia/NZ, and the markets of Asia (Japan/South Korea) and South East Asia. There is a strong concentration towards Bath and Bristol, but there are lower levels of inclusion of the region’s counties than seen for respondents that are selling the region on its own.

Figure 4: Ease of selling the region on its own or as part of a package



The table below gives a sample of verbatim feedback from respondents on how easy it is to sell the region on its own or as part of a package.

Easy to sell the South West on its own: 21 of sample	**"It is very easy to sell on its own if we can find the right accommodation at the right price! As most of our customers are from the UK, they don't usually combine with other regions but there are a few exceptions. We will be promoting our packages to the German market as from this summer and I do feel that this will change as Germans can ask to visit different regions in the same tour"** **"It is quite easy to sell the South West on its own. We just need stop overs in the way from and back to Germany as we sell coach tours mainly. However you can easily package it with other regions"** **"So far, easy. This is the first year for our Villages of South England and it is selling well (but it also goes to the South East)"** **"Generally we sell the South West as a standalone destination"**
Difficult/not easy to sell the South West on its own: 42 of sample	**"It is not really a standalone product for the Australian market as most of our passengers would combine it with other parts of England and the UK when they are travelling. They would rarely travel all the way from Australia to spend all their time in one particular region"** **"Not very easy to sell on its own. It is much easier to package with other parts of the UK. It is too close to London and therefore much of it can be done with day trips. The overnight tours, clients want to travel further for a few nights on tour"** **"We deal mainly with French speaking agencies and they often want to include London in all tours so selling the region on its own is quite difficult. French people are struggling to see what the UK has to offer apart from London in my opinion"** **"If we did small groups it would arguably be easier. But we operate 44-48 pax. per group and the size of coach and available accommodation limit our ability to sell individually. As we operate in long haul markets it would also be difficult as the awareness and subsequent demand just isn't there without major investment/marketing spend/major film or TV series coverage. As a result we package as part of a Britain tour providing a taste of the region"**

"Very difficult. When we talk of UK, London and Scotland are one of the major highlights. SW England comes a close fourth or fifth!"

"All our clients are long haul, it would be next to impossible to sell a complete tour just in the South West. It is easy to package with other parts of the UK or other parts of Europe"

The South West's tourism amenities and fabric

This section analyses responses surrounding the tourism amenities and fabric in the South West region. Respondents were asked to rate each aspect as well as provide any supplementary reasons behind the rating given.

Q. Thinking specifically about the region's tourism fabric and amenities please rate the

- Accommodation
- Visitor attractions and experiences
- Food & Drink offer
- Access and transportation

Q. Please provide any comments you have on the offer.

Accommodation

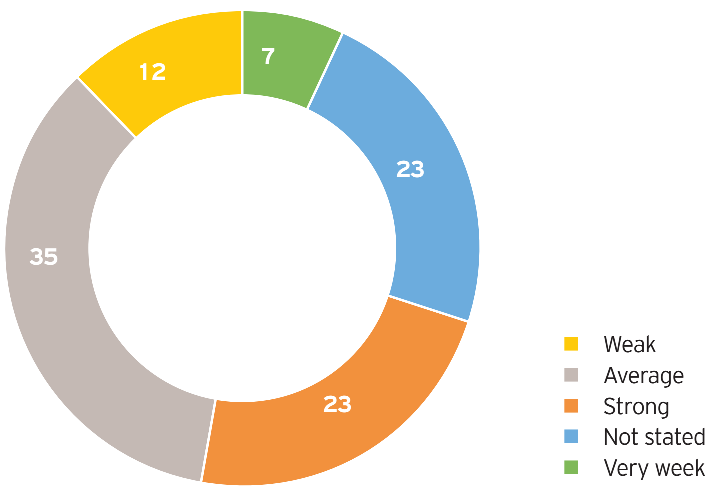
As in the qualitative study, the accommodation situation elicited the most vigorous comment of all the main elements of the region's tourism fabric.

About one-quarter of the sample rated the region's accommodation offer as strong. These respondents were mainly small volume operators (less than 500 pax. to the South West), with a strong presence in European markets.

50 of the sample rated the region's accommodation on the average/weak/very weak axis. Typical sentiments gravitated around issues of poor availability, high prices, low quality standards and insufficient hotel choices. These strongly echoed the opinions encountered in the qualitative stage of the project.

Respondents rating accommodation as average or weak, inevitably tended towards operators at the mid and higher ends of the volume spectrum. More significantly, they had a pronounced weighting towards long-haul American and Aus/NZ markets being their most important – potentially some of the most valuable for the region.

Figure 5: Rating of accommodation in the region (of sample)



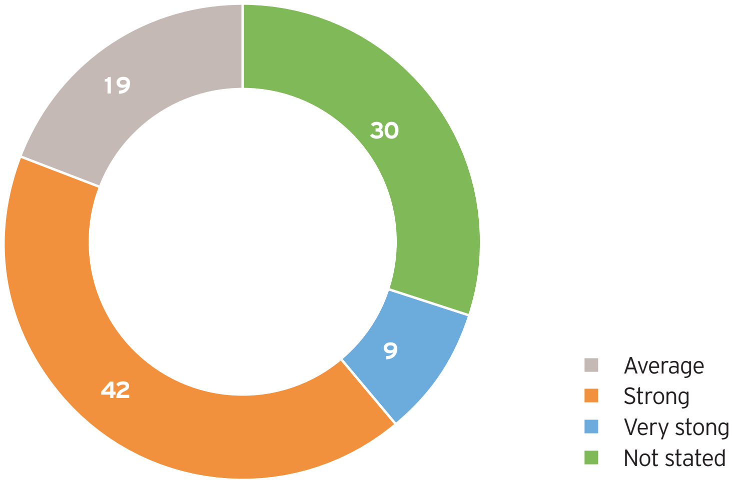
Strong: 23 of sample	**"Not many options so not competitive enough! As mentioned previously, we would be doing more tours if there were more hotels"**
Average: 35 of sample	**"Some very good, but like much of England, many that have a substantial gap between promise and delivery"** **"Capacity of hotels is limited and command high rates though quality of hotel is mid to poor quality compared with other major tourist destinations"** **"Hot spots for group tours lack a good choice of quality hotels, value for money generally not good in high season (I do recognise that many markets only travel May - September therefore the season is short)"** **"It always seems to be too little availability and then at too high prices. The hotel quality in the 3 star segment we are working with could be better. People see the high prices and expect great quality but it does not always match their expectations"** **"We try and use boutique hotels (Our group size is maximum of 15 or 18 passengers). Finding this type of accommodation who will accommodate 3 night stays in July is challenging even though we also provide business in shoulder seasons".** **"It would be helpful to have more hotels in the area who are willing to work on an FIT basis"** **"Difficult to find hotels willing to take groups in July & August. Difficulty with hotels communicating in a timely manner, even once booked".**
Weak: 12 of sample	**"Cornwall, Dorset for example. Accommodation is restricted to very few locations and even then not much in terms of offering. Bristol and certain parts of the coast (Bournemouth, Southampton) have good options but once you go towards Dorset and Cornwall you will be paying much more for poorer quality accommodation"** **"Difficult to find space - and if we do, prices are quite high"**
Very Weak: 7 of sample	**"Simply not enough accommodation of a decent standard (3/3.5/4 star) with 100+ rooms willing to take group business all season (1st April - 31st October)".** **"Not enough properties of the level we need (which limits the business we bring). Would like more 4 and 5 star availability".**

Visitor attractions and experiences

Visitor attractions and experiences in the South West clearly register strongly with the travel trade.

50 of the sample rated this aspect of the tourism offering as very strong/strong, with a further one-fifth viewing it as average. In addition to the renowned signature attractions in the region, there is a strong recognition of the variety and breadth of attractions available to visitors.

Figure 6. Rating of visitor attractions and experiences in the region (of sample)



The table below gives a sample of verbatim feedback from respondents on the region's visitor attractions and experiences.

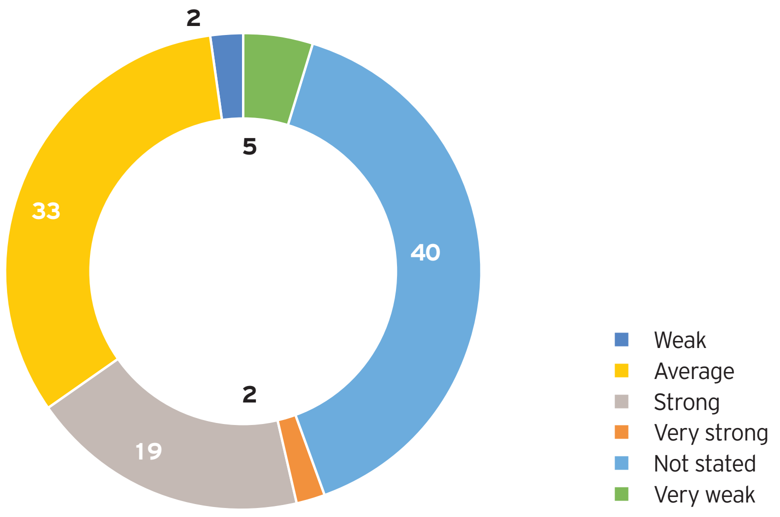
Strong/Very strong: 51 of sample	**"Great attractions that pull in high numbers of visitors, including world-famous sites such as the Eden Project"** **"The region is to enjoy scenery rather than visiting specific attraction (apart from Stonehenge). Stonehenge's development was good for some but made negative impact to many operators who need to cram so much activities in a day itinerary."** **"The range of attractions is actually good, however if we have nowhere to stay then we cannot bring our groups which is a travesty"** **"The visitor attractions are great"** **"Lots to see and do, I was impressed! A sightseeing pass for some of those attractions might be something that travellers would appreciate"**
Average: 19 of sample	**"Not much innovation in the past 20 years (unless I'm just unaware of it - is very likely!)**

Food and drink

While there was a significant non-response to this area of questioning, among the sample that answered, the tendency was towards a rating of average, with one-third of the sample selecting this response.

A further one-fifth consider the food & drink offer to be strong, and among these respondents this high rating tends to be associated with the excellence of iconic aspects of the regional cuisine, in particular seafood.

Figure 7: Rating of food and drink in the region (of sample)



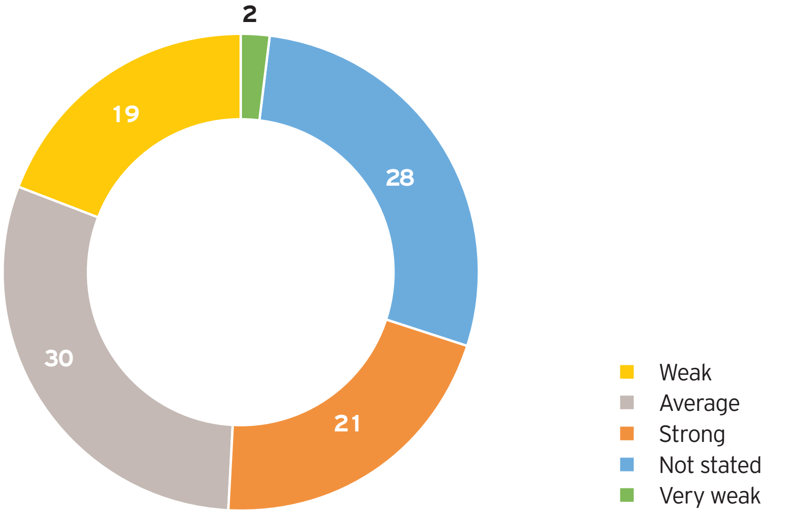
The table below gives a sample of verbatim feedback from respondents on the region's food and drink offer.

Strong/Very strong: 21 of sample	**"Nice seafood ! Strong selling points for our customers"** **"We have no issues with the F&B offering. Local, fresh, seasonal and of a good quality"**
Average: 33 of sample	**"Not as many issues here as on the accommodation front!"** **"I've not really found any stand out group food in the hotels that Boscolo uses with the odd exception"** **"Again people's expectations do not always match with what they get. But here is has to be said it is getting better".** **There is always room for improvement here, in scope and quality"**
Weak/very weak: 7 of sample	**"Limited number of restaurant or pub with large capacity. Standard of food quality is average to poor but expensive"**

Access and transport links

Access and transport attracted a marked negative response, with about one-fifth of the sample declaring it to be weak, and a further 30   only average. Typically these are sentiments concerning congestion, bottlenecks and the restrictions that small roads can impose on access for visitors. However, this is tempered by an acceptance that the limited transport infrastructure in some areas is a feature that enables the region to sustain its reputation for an unhurried and tranquil destination.

Figure 8: Rating of access and transport in the region (of sample)



The table below gives a sample of verbatim feedback from respondents on the region's access and transport.

Strong/Very strong: 21 of sample	**"Well connected with the option to travel by car, bus or train. Some cities not recommended for cars though due to lack of parking space (important for our self-drive clients)"** **"Most of our customers travel by coach so they can access anywhere easily".**
Average: 30 of sample	**"We use our own coaches so no problem with London as a gateway"** **"Coach travel is extremely difficult in Cornwall in the summer!"** **"Train service is fine, road links have improved, but then the smaller roads once there are part of the charm"** **"We have our own Mini Buses. Roads can be very congested"** **"Travelling by rail seems to be a good way to go. I know of at least three cities with easy train service from London (Plymouth, Newquay, and Exeter)... I'm sure there are more, but these are a good place to start. Not as many issues here as on the accommodation front!"**
Weak/very weak: 21 of sample	**"It is not easy - but that is probably the reason the regions are keeping its beauty. Personally I don't support the new Motor way plan - better train service (incl price)? & package tours from London (short stay) will be great."**

"The region is considered that you have to have car or coach to tour around. Not suited for individual visitors who wish to travel by public transport".

"Whilst improving, the infrastructure of the region still needs to be upgraded to facilitate coach travel. Combined with the accommodation issues then the current bottleneck situation will continue making the region unattractive for operators"

Experience of South West region's tourist boards

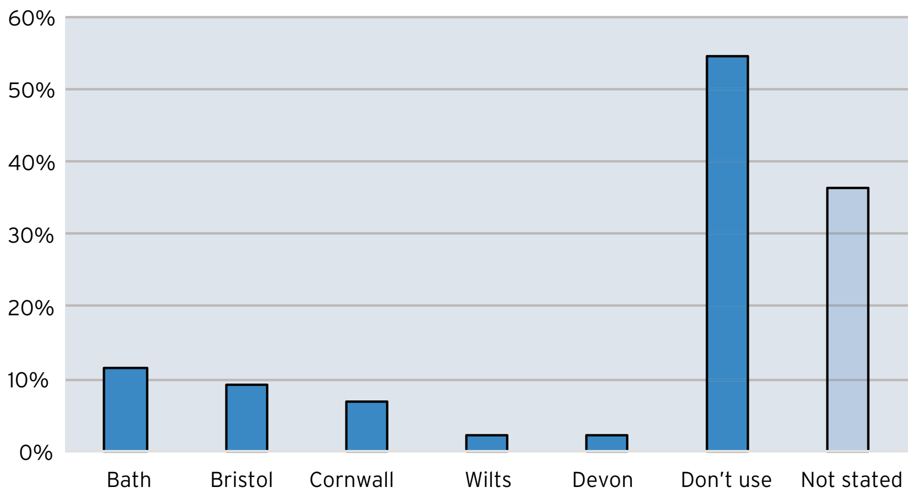
Q. Do you work with any tourist boards from counties in the region? If so which? Are there particular strengths/weaknesses among the Tourist Boards in the regions? What could they be doing better? Do you have any examples of best practice from other destinations across the UK & Ireland?

Among the travel trade sample, response levels for working with the regional boards was very low. Bristol and Bath had the highest uptake among the sample, although their absolute levels were each in the low single figures. Similarly for the boards of Cornwall, Wiltshire and Devon, which also registered at the edges of the scale. Where respondents had worked with these boards, they rated their experiences as almost uniformly strong/very strong.

The typical pattern among respondents that work with the boards is that they tend to work with an average of two across the region. If this pattern is repeated across the wider travel trade, it suggests that the engagement base may be a relatively small number of operators who work across several boards across the region.

55 of the sample claimed not to be working with any of the region's boards. This sub-sample features quite a high quotient of operators specializing in American markets, and given the feedback regarding the lack of knowledge about the South West region in these markets, this finding may suggest scope for creating more effective marketing links to the Americas.

Figure 9: Proportion of sample using SW regional boards



Respondents were also given the opportunity to suggest ways in which the boards could be doing more to promote the region, as well as any apparent strengths and weaknesses. Although there was little in the way of overwhelming consensus, the general flavour of responses tended towards getting the region better known, as well as addressing the more specific needs of particular markets.

"It would be good to get a newsletter informing about new hotel openings, special events"

"Advertisement in their language always attracts people's attention more"

"Local Tourist Boards provide excellent information on regional updates. I cannot think of any weaknesses".

"We work mainly with Visit England and Visit Britain"

"Exclusive promotion to specific nationality of their interest. Japan Forum (formed by Lake District, attractions, hotels, transport) providing workshops and offer Japanese literature."

"Be more proactive in terms of marketing".

"Be more proactive to approach the trade to help promote the area"

"Please arrange good fam trips from India so we are aware of your local products"

"Appropriate pictures to promote the region properly is always a problem. The pictures the Tourist boards offer are not that brilliant…"

"They could get advertising to the long haul markets, get Visit Britain to host Explore GB in the area perhaps."

"As mentioned before, a marketing plan/funds would be greatly appreciated"

Section 3: Discussion and recommendations

As the report demonstrates the travel trade – operators and wholesalers – are instrumental distribution mechanisms and sales platforms for the South West region. In addition to their promotional power, they also provide up date intelligence about consumer awareness, trends and motivators to travel.

We recommend that particular attention be paid to maintaining, developing and cultivating relationships with the travel trade.

Note that whilst FIT and Group operators gave opposed feedback about accommodation, especially in Cornwall (FIT have no major issues, Group TOs struggle to secure it) the feedback about the rest of the region was consistent across all buyers.

A. Positioning the region

Play on the positives:

1. Be bold about landscapes, landmarks, character, heritage, ancestry, tradition, authenticity, laid-back vibe – 'this is England'.

2. Attractions are perceived to be excellent – lead on the breadth of known and unknown attractions.

3. Gastronomy is also perceived to be of a high standard with good breadth of product – lead on the unique and traditional aspects of South West cuisine.

4. Present "doing" rather than just "viewing": identify behind the scenes, cooking, gardening, restoration-work lunches with locals or in their homes (Trafalgar / Be my Guest)

5. Unearth the unknown.

6. Continue to use TV and movie exposure to develop products/trails/movie maps. But don't rely on Rosamund Pilcher for Germany alone.

7. Consider regional led presentation of the South West (rather than sub-regional) in overseas markets where awareness is low – eg: via VB, online.

8. Consider that the SW for a first time visitor is likely to be part of a UK tour rather than a standalone visit. We advise that standalone product have to link to some honey pot attractions.

9. Bath is perceived to be the dominant image of the South West. Using the familiar as an anchor, the South West must ensure that the breadth of product range and proximity of its regions is clearly presented as a cohesive single destination to the trade.

10. The ancient Celtic heritage of the area could easily be packaged and promoted along with other themes such as genealogy and ancestry. Many regions now focus on themed years. Could 2017 be the South West's Gastronomy Year?

11. Cross-regional products could be packaged cross-sold e.g. Rural, cities, coastline.

Counter the negatives:

1. Accommodation seen as pricey – play up the locally run, non-chains.
2. Dead end – reversal. The north coast is same as the south. How can they be better distinguished? Walking v surfing? Beach v rugged coastline?

Note that the Groups market that constituted the majority of the survey sample. The FIT market didn't raise issues about accommodation.

B. Promoting the region

"The message seems clear – the South West needs to create a higher profile for the region in these markets, grow awareness, and understand the requirements in individual markets, while making effective use of mobile channels to reach the target audience."

There is a lack of awareness about the number of DMOs in the region and what the destinations are within the south-west region. The South West development fund commenced activities to start to improve awareness and knowledge. Now that funding has stopped there is a danger that the South West will continue to be mis-understood and under represented by the trade.

"The Torquay Workshop was very useful. Being specialized means that we're always looking for new and interesting things in the region. The south West needs to carry on building the momentum, because up to now it's been very low key".

1. Get into the market and maintain presence. In-market activity can be cost-prohibitive, such as attending overseas missions and running consumer-facing marketing. How can existing channels be better used to activate in-territory activity?

   - VB/VE PR
   - VB/VE attendance at international trade shows in core markets.
   - VB's Explore GB, which hosts overseas based buyers.
   - VB missions.
   - Co-funded South West attendance to share the financial load and recognise that consumers don't recognise boundaries.

2. The UK is home to majority of international buyers who contract products here and sell them on to overseas operators. Hence, it is essential to develop, maintain and cultivate relationships with the UK based trade. This can be done at events such as:

   - BIM
   - City Fair
   - GEM
   - WTM
   - UKInbound
   - ETOA membership and activation.

3. Repeat 'Showcase South West' and expand FAM trips to 2-4 days.

4. Create a consistent web presence per DMO for the trade outlining access, hotels, DMCs, ground handlers, transportation, F&B, itineraries, imagery. Offer email hotline service and promise and deliver 48-hour reply.

5. Create and maintain a central database of trade contacts for the South West. Keep the database up to date and issue bi-monthly newsletters updating the trade on developments and new itinerary ideas for the trade (rather than just individuals), imagery and contacts.

6. Develop specific marketing campaigns to align with the markets and sectors identified in the research: i.e. long haul/FIT=product deeper into the region, long haul/groups=boost offer in the brief visit to the easterly parts of the region.

7. Host year round Fam trips for the UK based international trade. When done well they deliver huge improvements in perception and offer hands-on product knowledge.

8. Cultivate long-term relationships with the trade that deliver repeat business.

9. As it's hard to draw international visitors from London, work with London who are happy to work with the regions on London+ promotion. City + Countryside packages may offer an easily digestible itineraries to visitors who want to see the capital but also want to see traditional 'England'.

10. The evident rivalry between Cornwall and Devon will continue to hamper future development and collaboration in the tourism sector, which is unfortunate to say the least but was certainly in evidence at the Workshop held at the Eden Project in Cornwall. Can this ever be resolved?

C. Developing product

1. Make the case for international tourists – their value and future economic impact. How can leading figures in the region support the principle engagement between the private sector product base and the international visitor?

2. Audit accommodation situation in region and identifying obstacles in development (planning regulations, local resistance etc.)

3. Lack of accommodation is blocking demand in Cornwall, especially for groups. Could hotels work in partnership with to create a 'group' offer? A network of B+Bs, cottages and small properties that sell their product in unison and are not affected by owner holidays and limited working days.

4. Create a central clearing house of accommodation for smaller operators.

5. Could the Cruise line industry offer potential solutions? Cruise Britain recently informed us that Torquay now has 7 calls. Could the relationship with Cruise liners be extended to Cornwall and then the relationship with Cruise DMCs expanded (Intercruise).

6. Could moored vessels offer an opportunity to expand accommodation in Cornwall?

7. If Cornwall does not expand its accommodation offer for Groups, can it pro-actively work with neighbouring regions to offer hotel stock? TOs are doing this themselves, could the region do it pro-actively? Cornwall can then position itself as day-trip for groups and an overnight destination for FITs. Same applies to Bath and Bristol.

8. Perhaps the big question for Cornwall and Devon is do they really want more visitors? Do they actually prefer being less accessible to the mass market? Do they prefer having a quiet winter season?

9. There appears to be a lack of perceived co-operation between hotels and tour operators & wholesalers. The trade are keen to see this resolved in some way. Should there be workshops for hoteliers and trade to better connect them and ensure that both sides are clear about each other's businesses? Masterclass style. Develop information and a training programme for accommodation providers about working with the travel trade especially ways to maximise their offer.

10. How is the Quality mark for hotels being activated in the SW region?

11. Can quality be improved? If not, can products be enhanced or value-added to compensate for this? E.g. The German market is particularly sensitive. Can German language materials be made available? German food, books, magazines etc.

12. Roadside amenities were sighted as problematic in some places. Does the region need an audit and gap-analysis study?

13. The relationship with GWR could and should be improved. A presentation with ETOA or leading tour operators with the Sales team could improve the perception and pricing of trade business.

14. The limited transport infrastructure for both road and rail continues to inhibit increased visitor numbers. Expansion of the capacity of the three airports on the peninsular might be the answer to increase accessibility if the necessary funding and investment were available. There should be a co-ordinated route development plan between the regions airports with a plan to increase international flights.

15. The Eden Project is by far the most innovative attraction in the region and is proof that such an attraction will bring more visitors to the region both from the UK and abroad. Perhaps this is the key to the future and rather than looking at traditional business models for increasing visitor numbers the regions should be considering more pioneering projects. The Wild Atlantic Way, and more recently Ireland's Ancient East were cited as new product developments that put a destination on the map. The South West should bid for a share of the VE £40m fund and deliver new and innovative products for the international market that are pan-regional and bring the entire area under a single theme. Ideas could include a South West Atlantic Way – by foot, bike.

D. Priorities

- Create more motivational awareness in market beyond the current image of the South West.
- Develop 'themed years' – package existing product in an interesting way.
- Promote the region to international in a joined up way both in the UK and overseas.
- Clarify your position on the accommodation issue.
- Bid for product development funding from the VE £40m and create new awareness boosting product.

SOUTH WEST ENGLAND IS GREAT BRITAIN