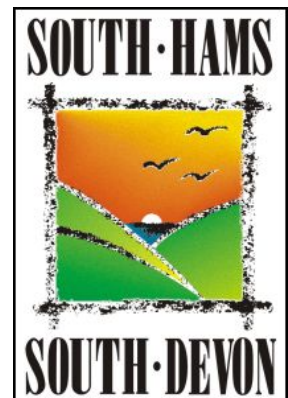




**South Hams
District Council**

South Hams Tourism Strategy

2007 - 2012



Adopted April 2007

South Hams Tourism Strategy 2007- 2012

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1. Council Priorities

South Hams District Council has six key priorities aimed at improving the well-being of its residents. These are:

CP1	Affordable Homes	Securing a supply of housing for local people at affordable levels
CP2	Good Jobs	Creating the conditions for the growth and maintenance of quality economic activity
CP3	Retain the District's Character	Maintain the district's distinct environment whilst enabling access and sensitive development
CP4	A Clean District	Maintain a clean environment
CP5	An Accessible Council	Work with others to improve access to key services
CP6	Value for Money	Improve core service performance in a cost-effective way

In December 2005, the Council reviewed and confirmed these six priorities, and introduced three new cross cutting themes in relation to climate change, the needs of younger people, and facilitating a healthier community. These additional themes are not established as priorities but will be taken account of within existing priorities.

This Tourism Strategy directly supports Council priorities CP2 & CP3. Its ability to do so is reliant to some extent upon the other four priorities.

Various community consultation activities and Members' workshops took place to assist a review of the Council's core targets. The completion of this work has influenced the final form of this Strategy along with other key strategies such as the Community Strategy, Local Development Framework, Prosperity Strategy, and Public Space Strategy.

2. Why we need a Strategy

The Purpose of this Strategy

Tourism is vital to the economy of the South Hams. In 2005, well over 4 million visitor nights were spent in the district with over £134 million spent on accommodation alone. It is estimated that almost a quarter of all jobs in the district are directly related to tourism with many more indirectly linked.

This strategy document aims to provide a reference point for tourism development over the next five years. It will be supplemented by annual service plans that will together:

- Provide a clear strategic direction for the development of tourism in the South Hams
- Show how South Hams District Council will support the development of tourism within the South Hams and the wider region.
- Provide a clear framework on how businesses & other stakeholders can contribute towards the long term strategic direction of tourism in the South Hams
- Encourage closer partnerships between the private and public sector

Linking Documents

This revised Strategy, sits under the South Hams Community Strategy and Prosperity Strategy. It is also influenced by the Local Development Framework (LDF). The intention is to provide direction to all involved agencies and partners for the next five years (subject to periodical review). This partnership approach is fundamental to making progress over the longer term.

A Sustainable Approach to Tourism

South West Tourism's 'Towards 2015' strategy document defines sustainability in tourism to be "*the interaction between the needs of the visitor, industry, community and environment*". The guiding principles of Sustainable Tourism are as follows:

- It is an *approach* not a type of tourism. It is a holistic approach with economic, environmental, and social dimensions, rather than a particular type of tourism.
- It is not a niche issue, market or product
- It is a collective responsibility of all involved, directly or indirectly, in tourism
- Sustainability is about quality - whether it is the quality of the environment attracting visitors, residents' quality of life or the quality of the visitor experience.
- Sustainability is about competitiveness - ensuring that we constantly strive to exceed expectations and operate in a way that is resource efficient.
- Sustainability is about prosperity & opportunity for all

How we will ensure sustainability is at the heart of tourism

Sustainable tourism is fundamentally about achieving a workable balance between the needs of visitors, industry, community, and the environment. It is a constantly evolving process that we will work towards by:

- encouraging local policy makers to incorporate sustainability into their planning processes;
- becoming engaged in consultation processes for the local development Framework, Community & Prosperity Strategies etc;
- playing the role of ‘Honest-Broker’, keeping open channels of communication between all stakeholders. We will continue to facilitate discussion and debate through the following mediums:

<p>Visitors</p> <ul style="list-style-type: none"> • Regular visitor surveys • Involvement in AONB & Landscape & Leisure research • Monitoring of regional, national and international trends • Responding to visitor complaints/praise 	<p>Industry</p> <ul style="list-style-type: none"> • Regular surveys of tourism businesses • Involvement in tourism forums • Business focus groups • Encourage cross-sector networking • Continued involvement in Association of South Hams Tourist Information Centres (ASHTIC)
<p>Community</p> <ul style="list-style-type: none"> • Community Consultation Events & Consultation Surveys for Tourism • Maintain communication channels with community groups • South Hams Strategic Partnership • Cultural Tourism events and festivals 	<p>Environment</p> <ul style="list-style-type: none"> • Regular liaison with environmental groups, AONB unit etc • Continued focus on Green Tourism • Involvement in Local Development Framework development – designation, protection & enhancement of the environment

3. Previous Achievements

Previous tourism strategies have focussed on a sustainable approach to tourism. In particular, there has been a major focus on negating the impact of tourism on the local environment with a series of green tourism initiatives. The work inspired by previous strategies has resulted in national and international recognition including:

- The South Hams Green Tourism Business Scheme was regional winner of the 2003 Green Apple Award and a finalist in the 'Hand in Hand' environmental Award competition. The scheme was also recognised with a certificate of achievement by the Business Commitment to the Environment awards scheme in 2003. The Scheme has now been adopted as a regional accreditation scheme by South West Tourism.
- South Hams District Council was awarded Beacon Council Status for Sustainable Tourism 2004-2005. The Council was one of only six Councils in the country and the only Council in the South West region to receive this award.
- South Hams Tourism team were given a 'Highly Commended' award in South West Tourism's 2005 Excellence Awards
- Three awards were made to South Hams sustainable tourism projects in the prestigious 2005 First Choice International Tourism Awards.
- Effective partnerships have been formed & developed e.g. Green Tourism Project, Destination South West, Devon & Cornwall Overseas Marketing, Discover Devon Naturally, Marketing partnership with Teignbridge District Council etc
- South Hams District Council has successfully attracted European and other funding for Sustainable Tourism projects

In addition, many local businesses have been recognised for their excellence over recent years including:

South West Tourism Excellence Awards

- Large Hotel of the year 2004 - Thurlestone Hotel
- Small visitor attraction of the year 2004 - Pennywell Farm
- Tourism Website of the Year 2005 - Royal Castle Hotel
- Tourism Website of the Year 2006 - Compton Pool Farm
- Silver Award for Large Hotel of the Year 2006 - Dart Marina Hotel
- Silver Award for Holiday Park of the Year 2006 - Hillhead Holiday Park

Food & Drink Awards

- Taste of the West Overall Champion product 2004 - Bramley & Gage Fruit Liqueur
- Taste of the West Overall Champion product 2005 - Sharpham Brie
- Les Routiers UK Dining pub of the year 2005 - The Dartmoor Union Inn, Holbeton
- Devon pub of the year 2006 – The Rose & Crown, Yealmpton
- AA English Restaurant of the year 2005 - New Angel, Dartmouth

4. Challenges for the Future

The pressures on the tourism sector and the drivers of change are detailed in appendix B. To ensure the prosperity of the tourism industry in the South Hams, the private and public sectors need to work together to overcome a number of challenges:

- With increasing pressure on local government budgets, the Council needs to focus on activities that cannot easily be carried out by the private sector. Over the period covered by this strategy, the Council will facilitate a process to find new ways of enabling the private sector to be involved in developing and regenerating tourism. In particular, the Council will be looking to the private sector to take over responsibility for destination marketing activities.
- New regional strategies for destination management present opportunities and challenges. The Council will work with businesses and other stakeholders to develop new structures that provide benefits to all stakeholders within the South Hams.
- The inherent characteristics of low pay in the service sector and the high cost of housing locally continue to impact on tourism at many levels. The attractiveness of the area as a destination has resulted in pressure of second homes and holiday homes on the housing market. The recruitment and retention of quality staff is also becoming increasingly difficult. The Council & tourism sector needs to understand these pressures and find ways to counter them.
- Seasonality remains an issue within tourism. We need to work together to lessen its negative impacts and increase year round employment.
- UK & European legislation such as changes to the Common Agricultural Policy, Working Time Directives, and Minimum Wage etc are already impacting on tourism. We need to anticipate how these changes will impact on the industry.
- To be able to continue attracting high spending visitors we need to ensure we constantly exceed expectations. We need to maintain a focus on quality both in terms of public realm infrastructure and within the private sector. This includes working with planning authorities to implement policies based on improving quality.
- The pressures on our environment are immense, both locally and internationally. We need to continue to find ways to protect our greatest asset and negate the less favourable impacts of tourism.

5. Tourism – Roles & Responsibilities

Council Priorities & Future Role

The overall priority of South Hams District Council with regard to tourism is to ensure a prosperous, sustainable tourism sector. This Tourism strategy aims to support the two key Council priorities of **good jobs** and **retaining the district's character**.

The review process identified the following:

- A strong desire to continue and develop previous work on green tourism.
- A requirement to focus on increasing visitor spend rather than visitor numbers.
- A need for the public and private sector to work together more.
- An increasing need to investigate partnership opportunities within Devon.
- A shift in the Council's focus from marketing support to green tourism and product development.

The Council will seek over the next few years to address the following:

Delivery Structures

Pressure on local authority budgets and new regional strategies for destination management necessitates that we look afresh at how we deliver destination management and tourism marketing in the South Hams. The Council is committed to investigating a variety of options for the funding and delivery of tourism management for the area. The three principal areas for investigation are:

- Closer working arrangements with Teignbridge District Council including joint marketing and promotion on a South Devon basis.
- Collaboration in the emerging Devon Destination Management Organisation (DMO), and/or in alternative local arrangements which may be established.
- Exploring opportunities for private sector marketing arrangements, which may lead to other forms of service delivery.

Marketing & Promotional Activity – South Hams District Council and Teignbridge District Council have entered into a partnership to jointly promote the two districts under the 'South Devon' brand. Funds for this activity have been committed for three years to cover marketing activity for the 2007, 2008 and 2009 seasons. During this time, the Council will work with Tourism businesses to facilitate a handover of marketing activity from the Council to the private sector.

Partnership Working

Tourism is a fragmented industry and yet it is essential for all stakeholders to work together in order to secure the prosperity of the area. To date the Council has been involved in a number of successful partnerships including the South Hams Sustainable Tourism Initiative, Destination South West, Devon & Cornwall Overseas Marketing, Discover Devon Naturally, ASHTIC etc. Other partnerships, such as the emerging Devon Destination Management Organisation, have the potential for long-term benefits to the tourism industry.

Increasingly we need to draw together all public and private organisations in order to reach agreements on actions to improve the visitor experience of the South Hams. The Council's tourism team will continue to facilitate partnerships within the South Hams, within Devon and across the South West region.

Destination Management

A principal role of the tourism team in the future will be in a coordinating role as destination managers ensuring that the needs of the tourism sector are represented with regard to public realm issues e.g. beach management, public toilets, car-parking, refuse collection, public open space etc

Exploiting external funding opportunities - The Council will continue to liaise with other public sector bodies and the tourism industry to identify future funding opportunities.

Accessibility - The Disability Discrimination Act means that all businesses have to make reasonable adjustments to the way in which they deliver their services so that they do not discriminate against disabled people and are better able meet disabled peoples' requirements. The Council will encourage tourism businesses to not only meet their legal obligations but also recognise that this makes good business sense. We will also ensure that we meet the requirements of the Disability Equality Duty (DED).

6. The Vision & Strategic Aim

The long-term sustainability of the tourism industry is at the core of this strategy. It recognises that the scale, pace and character of development must be carefully balanced to safeguard the South Hams' environmental, economic, historical and cultural assets.

Tourism must be developed responsibly if it is to achieve wider economic, environmental, and cultural benefits for the South Hams.

The Vision

The South Hams aspires to be a visitor destination, famous for its approach to sustainable tourism.

Strategic Aim

To maximise the long-term economic prosperity of the area by supporting the delivery of a truly sustainable tourism industry.

7. Objectives & Headline Actions

The key areas that the strategy will be delivered through are as follows:

I. Environment

The biggest assets that the South Hams has are its environment, unique culture, and heritage. We would like to be famous as a destination that respects and proactively protects these so it is important that everyone who benefits from our overall environment takes responsibility for protecting and enhancing it.

II. Tourism Marketing

The South Hams Tourism team will, in the short term, continue to support a marketing function to the tourism industry. However, the Council will move towards a situation where all marketing activity is funded and managed by the private sector. We will endeavour to facilitate a long-term private-sector based marketing partnership for the South Devon area. Other delivery arrangements will also be considered.

III. Business Support

Business Support will be a key function of the South Hams Tourism team. The tourism sector within the South Hams is fragmented and the Council's tourism team will provide a coordinating role within the local industry and also provide a link to regional and national tourism bodies.

IV. Public Realm, Infrastructure & Services

The Council has an important role to play as a manager of much of the infrastructure & services that can make or break the visitor experience. This includes car parks, public toilets, parks and gardens, open spaces, beaches, refuse collection, planning and development etc. The Council also recognises the importance of the local independent

Tourist Information Centres (TICS) and will continue to work with them to ensure that visitors and potential visitors can access the information they need when they need it.

Where do we want to be in 2012?

By the end of the term of this strategy, we aim to have:

- Achieved the economic, environmental and quality targets set out within this strategy document.
- Provided a framework for increased industry engagement and financial contribution towards marketing activity and destination management
- Introduced closer working relationships between South Hams District Council and Teignbridge District Council and ensured that the South Hams has benefited from the development of the Devon Destination Management Organisation.
- Achieved year on year growth of participation by industry in sustainable tourism initiatives
- Demonstrated effective and efficient destination management arrangements
- Ensured that this tourism strategy links with, and supports, the Local Development Framework that provides the overarching policy document for sustainable development in the South Hams.

8. Tourism & Marketing Strategy Action Plan 2007-2012

This Action Plan will be the main tool for securing the headline actions detailed in this strategy. It will be subject to periodic review and supported by annual Action Plans.

Key Objective #1 – Environment				
Promote tourism that seeks a balance between needs of host communities, tourism businesses, visitors and the environment.				
Title	Description	Expected Outcome	Due Date	Action Categories
Focus of Activity	A re-focussing of activity towards green tourism, cultural tourism and product development over the three-year period 07-09	Sustainable Tourism, product development etc the main focus of the Tourism Team's activity	April 2009	Community Strategy Prosperity Strategy
Distinctive Environment	Encourage stakeholders in the tourism industry to be active in the protection and enhancement of the distinctive environment & cultural heritage of the South Hams Continue to promote sustainability via tourism forums Provide information on sustainability via the corporate website – information reviewed quarterly	Number of visitors citing quality of the environment as a reason for their visit - Maintain or increase 2005 level of 87.8%	March 2012	Local Development Framework
Green Businesses	Continue to support & promote the Green Tourism Business Scheme. Coordinate at least 1 Green Business networking opportunity pa Publish 5 new best practice case studies on corporate website pa	10 new GTBS members recruited annually Documented evidence of cost savings, reduced environmental impact, increased marketing exposure etc of GTBS businesses	March 2012	
Visitor Payback	Visitor payback scheme reviewed Tourism team to engage with stakeholders to review scheme	Decision made on feasibility of a new scheme being developed	Sept 2007	

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	Description	Expected Outcome	Due Date	Action Categories
Culture & Heritage	Examine the impact of cultural tourism on the economic prosperity of the area - Report to be commissioned. Investigate current support structures & identify potential new areas of support that could be provided. Investigate partnership opportunities with Teignbridge DC	Implement objectives of Sustainable Tourism project	March 2008	

Priority #2 - Tourism Marketing

Promote the South Hams as a destination for short breaks and longer holidays regionally, nationally and internationally through a network of public and private partnerships

Title	Description	Expected Outcome	Due Date	Action Categories
South Devon Marketing Partnership	Partnership with Teignbridge on guide & website for 3 years.	Production of annual guide for three years subject to annual review Implementation of new South Devon Website	March 2009	Community Strategy Prosperity Strategy
South Devon Area Tourism Partnership	Work with the Devon DMO and tourism stakeholders in South Devon to develop an Area Tourism partnership	Handover of Marketing activity to local partnership	April 2009	Local Development Framework
Partnerships	Review of existing partnerships e.g. Destination South West, DACOM etc Develop joint marketing opportunities with Teignbridge District Council, DMO etc Partnership opportunities and exploring alternative forms of service delivery providing cost savings & efficiencies	Reduced marketing costs, increased efficiencies	Annually	
PR - Residents	Proactive annual PR campaigns Raise awareness locally of benefits of tourism	Measure community satisfaction with Council's tourism strategy and its implementation every two years Maintain 2005 level – 84% of local residents surveyed stating that tourism has a positive impact on the South Hams	March 2012	

Priority #3 - Business Support & Development

Help improve the productivity of the industry through the provision of business support & development

Title	Description	Expected Outcome	Due Date	Action Categories
South Devon Area Tourism Partnership	Work with the Devon DMO and tourism stakeholders in South Devon to develop an Area Tourism partnership	Partnership in place by March 2008	March 2008	Community Strategy
Tourism information & statistics	<p>Ensure the effective dissemination of tourism information & statistics</p> <p>Publication of tourism research & statistics information on corporate website - annually</p>	Publication & dissemination of South Hams tourism strategy	March 2012	<p>Prosperity Strategy</p> <p>Local Development Framework</p>
Business Support	<p>Ensure tourism businesses can access info sources for advice, training, business development & marketing advisory support</p> <p>Details to be published on corporate website – reviewed twice annually</p> <p>Guest speakers invited to tourism forums</p> <p>Provide training facilities</p>	<p>Increase number of visitors to tourism business support section on www.southhams.gov.uk. Baseline to be established. Increase by 20%</p> <p>Increase number of businesses subscribing to Tourism newsletter. 2006 = 536. Increase by 20% to 643</p>	March 2012	Local Development Framework
Tourism Forums	<p>Facilitate handover of Tourism Forum to local partnership.</p> <p>In the interim, provide support to forum for debate, discussion & partnership working with the tourism sector & other stakeholders</p> <p>Facilitate Tourism Forum meetings - minimum 4 events annually, but require the sector to run the forums in the medium term.</p> <p>Support regular & ad hoc Newsletters & email updates</p> <p>Satisfaction research carried out annually</p>	Increase number of businesses attending tourism forum. Increase average attendance to 60 attendees	Sept 2008	

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Title	Description	Expected Outcome	Due Date	Action Categories
Improving skills	<p>Improve the skills of the tourism workforce</p> <p>Liaise with training providers to provide information on & access to training providers</p> <p>Provide information on corporate website – review quarterly</p> <p>Provide rooms for training where necessary</p>	<p>Increase the number of tourism businesses/staff undergoing training.</p> <p>109 tourism staff underwent tourism skills training in 05-06. Increase by 10% annually</p>	March 2012	
Improving Quality	<p>Improve standards in tourism</p> <p>Maintain a policy of promoting only graded accommodation providers</p> <p>Promote National Quality Assessment Schemes - Provide access to grading information & providers</p> <p>Investigate feasibility of a local assessment scheme</p> <p>Continue to promote GTBS</p>	<p>Increase participation in NQAS scheme from 22% (2006) to 50%</p> <p>10 new GTBS members recruited annually</p>	March 2012	
Cross-sector partnerships	<p>Support and promote related sectors e.g. Food & Drink and Marine</p> <p>Promote sectors on website etc</p> <p>Work with partners to bring different sectors together</p>	<p>At least one cross-sector networking event held each year</p>	March 2012	

Priority #4 - Public Realm Infrastructure & Services

Ensure visitor expectations are met with regard to public realm infrastructure and services

Title	Description	Expected Outcome	Due Date	Action Categories
TIC Support	<p>Facilitate ASHTIC meetings - Minimum 2 ASHTIC Meetings a year. Provide meeting facilities and administrative support.</p> <p>Provide advice and support to individual TICs as appropriate</p> <p>Liaise with TICs to identify alternative sources of income, investigate opportunities to improve service and achieve economies of scale</p>	<p>Strong supportive working relationship between SHDC & TICs</p> <p>Successful and profitable Tourist Information Centres</p>	March 2012	<p>Community Strategy</p> <p>Prosperity Strategy</p> <p>Local Development Framework</p>
Visitor satisfaction	Monitor levels of visitor satisfaction with public realm issues - visitor satisfaction research every three years.	<p>Address issues highlighted</p> <p>Maintain or improve on 2003 results: On a scale where 1 is very poor and 5 is very good, visitors rating the South Hams as 4.1. 84% of visitors feel their holiday is good value for money 99% of visitors stating they will return</p>	March 2012	
Beach Management	<p>Representation on the Beach Management Group</p> <p>Improved coordination of beach management issues.</p>	<p>Retention of beach awards</p> <p>Annual sponsorship arrangements achieved</p>	March 2012	
Community Satisfaction	<p>Measure community satisfaction with Council's tourism strategy and its implementation</p> <p>Community satisfaction research every two years</p>	<p>Measure community satisfaction with Council's tourism strategy and its implementation every two years</p> <p>Maintain 2005 level – 84% of local residents surveyed stating that tourism has a positive impact on the South Hams</p>	March 2012	

Cont...

Title	Description	Expected Outcome	Due Date	Action Categories
Strategy coordination	Tourism team to ensure they are involved in consultations for all relevant strategies	Tourism planning integrated into strategies and policies across the Council & community	March 2012	
Destination Management	Destination management role publicised to the tourism industry via Forum, on corporate website & other council media – reviewed twice yearly	Provide a coordinating role as destination manager for the South Hams	March 2012	
Events, Festivals & culture	<p>Investigate how the Council utilises its assets with regard to events & festivals, filming etc</p> <p>Production of an events & festivals policy document</p> <p>Regular film friendly training conducted</p>	<p>Implementation of an events and festivals policy</p> <p>Effective management of film crew requirements and responsibilities</p>	March 2012	
Transport	<p>Encourage visitors to use alternative forms or public transport</p> <p>Promote green transport and accommodation opportunities via website, forums etc</p>	Increased use of public transport & alternative forms of transport – measured by visitor survey work	March 2012	
Waste Management	<p>Support & promote Council initiatives to reduce waste and increase recycling</p> <p>Encourage tourism sector to provide information to visitors</p>	<p>Promote initiatives via visitor web site</p> <p>Information passed on via Tourism Forums</p>	March 2012	

Appendices

Appendix A

Strengths, Weaknesses, Opportunities & Threats - SWOT Analysis

Strengths

- High quality environment - 2/3 of district within AONB or National Park
- AONB & National Park status ensures distinct environment is protected
- Diverse geography (coast, 'hams' & moor)
- South West Coast Path
- Heritage Coast designation
- National Trust land
- Predominantly rural area with few large roads & towns
- Over 60 miles of stunning coastline
- Large and varied number of beaches including 9 award-winning beaches
- High percentage of repeat visitors
- Good quality locally produced food & drink
- Large and varied number of pubs, restaurants, cafés etc
- Diverse range of serviced & self-catering accommodation
- Strong focus on Green tourism
- Well supported visitor payback scheme
- Strong cultural sector with many resident artists and galleries
- Strong water-sports sector
- Distinct, vibrant and historically interesting towns
- Many facilities remain open outside of peak months
- Perceived as a quality destination
- Mild climate
- People taking more short breaks
- Good Roads to South Hams from rest of country
- Increasingly attractive to cruise ship visits

Opportunities

- Changing nature of holiday market – more short breaks
- Development & promotion of local food & drink
- Exploit our head start in green tourism
- Further develop visitor payback scheme
- Cheaper air travel and new routes to & from regional airports
- Further develop cruise ship market
- Improve awareness & take-up from overseas visitors
- Improve take-up of national quality grading schemes
- Develop niche markets e.g. green tourism, cultural tourism, maritime etc
- Concentrate on quality over quantity
- New opportunities for destination management
- Promote out of main season short breaks, walking (mild climate)
- Climate Change
- Niche market - food and drink, markets, events, festivals and restaurants.
- Increasing prominence as film / TV location

Weaknesses

- Fragmented, geographically dispersed industry
- Sector is still heavily seasonal
- Some facilities close over winter months
- Seasonal employment leads to low investment in skills training
- Recruitment & retention of quality staff increasingly an issue
- Share of Devon tourist nights falling over recent years
- Low percentage of graded accommodation
- Cost of housing
- Poor pay within the industry
- Lack of up-to-date performance data
- Poor awareness of the South Hams brand
- AONB & National Park status can limit and/or slow development
- Road network & towns congested during peak months
- Car parking often perceived to be expensive & limited
- Poor Public Transport
- Tourism industry not seen as a career or vocation
- Changeable weather,
- Few family orientated attractions

Threats

- Changing nature of holiday market – more short breaks
- Foreign travel destinations
- Cheaper air travel and new routes to & from regional airports – competition & environmental damage
- Increasing reliance on car travel leading to road congestion and parking problems
- Environmental damage
- Current strength of housing market resulting in sales/closures of hotels etc
- Focus on increasing visitor numbers rather than increasing quality/value of visitors
- Failure to adapt to changing markets and competition
- Fear of terrorism affecting overseas visitors
- Climate Change
- Increasing percentage of second homes
- Lack of brown-field development land
- Changes in taxation regimes e.g. tourism taxes

Appendix B

External influences – STEP Analysis

The South Hams Tourism sector is influenced by many external factors. Some of these are common to most tourism destinations. Others are particular to the area.

<p>Political</p> <ul style="list-style-type: none"> • Govt. policy – ‘Tomorrow’s Tourism’ & ‘Tomorrow’s Tourism Today’ • Pressure on local govt funding for tourism – discretionary activity. • Gershon efficiencies • Visit Britain policy on grading schemes • South West Tourism’s 2015 strategy • European expansion and integration • The threat of terrorism • Licensing Act 2003 • Changes to the Common Agricultural Policy • Changes to Pension legislation enabling investment in property 	<p>Economic</p> <ul style="list-style-type: none"> • Increasing disposable income and demand for quality experiences. • Lack of time - money rich and time poor - leading to a need for good information. • Healthy economic climate (for now) • Threats to hotels from closure/conversion • Cheap airlines • Expanded routes in & out of regional airports • Rising fuel prices • Reliance on cars • Pressures on transport network • High cost of housing • Low pay in tourism sector • End of EU Objective 2 funding • Increasing traffic congestion affecting mobility, journey time and mode of transport • Wider competition for discretionary spend • National Minimum Wage
<p>Social</p> <ul style="list-style-type: none"> • Decline of traditional two week holiday • Growth in short and additional holiday taking, by domestic and overseas visitors. • Growth in interest in participative holidays, including arts and culture, informal recreation, and health and environmental issues. • Demographic changes leading to more people in the 55+ age bracket, many of whom are active short break takers. • Changing family patterns • Population older and wealthier (for now) • Trend away from traditional destination marketing towards lifestyle marketing • Changes in patterns of leisure time • Changes in working patterns • Increasing pressure on disposable income • Changes to lifestyles 	<p>Technological</p> <ul style="list-style-type: none"> • Consumers increasingly comfortable using internet for information provision and online booking/purchasing • Increased adoption of broadband – enhanced functionality available • e-marketing – new ways of communicating with visitors • Portable/in-car information devices

Appendix C - Market Trends & Characteristics

1. Market definition - sectors and segments

The Tourism market in the South Hams is predominantly composed of small and medium sized businesses. There are few businesses within this sector employing more than 50 staff. In fact, many businesses could be classed as micro-businesses.

The key sectors within the market are:

- Guesthouses/B&B
- Hotels
- Farmhouse Accommodation
- Caravan & Camping
- Self Catering
- Self Catering Agencies
- Inns
- Attractions
- Activity providers
- Transport operators
- Tourist Information Centres

It is important to note many more businesses benefit from, and often depend on, the tourism trade. From plumbers to chemists, from newsagents to yacht chandlers, a large proportion of jobs and businesses are only made sustainable by the annual in-flux of visitors to the area.

Research conducted by South West Tourism concluded that in 2003 tourism spend in the South Hams amounted to just over £220m. This expenditure directly supported 6,382 jobs making 17% of overall employment.

Holiday Visitors

Research conducted by South West Tourism among visitors to the South Hams on behalf of the Life into Landscape project in the summer of 2005 identified the following:

- 64% of visitors to the South Hams during 2005/6 were classified as ABC1s, with around one fifth being ABs (21%).
- 29% of visitors fell into socio economic group C2, whilst the remaining 6% were classified as a DE.
- Staying visitors were slightly more affluent than day visitors.
- 56% of visitors to the South Hams during the 2005/6 survey were on an overnight stay.
- Around one fifth (21%) of visitors were on a day trip to and from their home on the day of their visit, whilst a similar proportion (23%) were visiting the area from holiday bases outside the South Hams (day visitors on holiday).
- 77% of visitors to the South Hams during 2005/6 were visiting the area in adult only groups.

- A slightly higher proportion of staying visitors to the South Hams were visiting with children, compared with day visitors.
- The peak period saw the proportion of those respondents visiting the South Hams with children at its highest at around a third of all visitors (32%).
- During 2005/6, around 8 out of 10 visitors were visiting the South Hams in adult only groups. This reduced slightly to around 7 out of 10 visitors during the peak period and fluctuated to approximately 8 out of 10 during the shoulder months and peaked at around 9 out of 10 during the off-peak period.
- 27% of visitors to the South Hams during 2005/6 were aged 34 or under, whilst the remaining 73% were aged 35 years or over, including 56% aged 45+ years.
- 4% of visitors interviewed during the 2005/6 survey were registered disabled, this varied from 3% of day visitors to 6% of staying visitors. There was little variation according to the time of year.

Area of Origin

- With the exception of 3% of respondents (21 respondents), all visitors interviewed during the 2005/6 survey were domestic residents of the UK (97%).
- Around one fifth (18%) of all visitors lived locally in Devon, whilst a further 5% of all visitors lived in Greater London, Somerset and Wales respectively.
- 39% of day visitors were Devon residents, whilst 7% of staying visitors were from Greater London.
- There was a shift towards more local residents visiting the district during the off-peak period.
- Over four fifths (81%) of day visitors from home were from Devon, whilst a further 5% were from Cornwall.
- The largest proportion of day visitors on holiday originated from Wales, with a further 6% from Greater London and 5% from Hampshire.
- 7% of staying visitors were from Greater London.

Top Counties of residence of visitors

Berkshire	3%	Hampshire	4%
Surrey	3%	Wales	5%
Hereford & Worcs	3%	Somerset	5%
Bristol	4%	Greater London	5%
West Midlands	4%	Devon	18%

2. South Hams - Trends in Tourism

The five years 2000-2004 have presented a mixed picture for tourism in the South Hams. There has been consistent growth in visitor numbers and spending since 2001 (the year of foot & mouth) although the consistent annual loss of bed spaces is a concern.

Tourist Nights 00-05

Year	2000	2001	2002	2003	2004	2005
Tourist Nights	4,247,000	4,150,100	4,275,900	4,280,700	4,316,100	4,205,900
Annual Increase of	-	-96,900	+125,800	+4,800	+35,400	-110,200

Devon Tourist Nights spent in South Hams 00-05

Year	2000	2001	2002	2003	2004	2005
%	13.2%	13.2%	12.9%	12.9%	13.1%	12.7%

Tourist Spending 00-05

Year	2000	2001	2002	2003	2004	2005
Av. Daily Spend per head (£)	£29.90	£30.48	£30.79	£31.68	£32.64	£33.58
Total Annual Spend (£ m)	£120.10	£119.89	£126.00	£129.9	£133.9	£134.1

Tourism Spending in the South Hams 2005

Type of Accommodation	Annual Tourist Nights	Daily Spend per night (Devon average)	Total Annual Spend £m
Hotels/Guesthouses	644,500	£54.80	£35,318,600
Flats/Cottages	727,500	£32.31	£23,505,525
Holiday Park Units	798,500	£32.24	£25,743,640
Touring Pitches	1,008,600	£20.12	£20,293,032
Private Households	1,026,800	£28.45	£29,212,460
Total	4,205,900	£33.58	£134,073,257

Capacity (bed spaces) - South Hams 00-05

Year	2000	2001	2002	2003	2004	2005
Bed spaces	31,610	30,430	29,930	28,790	28,120	27,030

Serviced accommodation occupancy rates 00-05

Year	2000	2001	2002	2003	2004	2005
%	37.14	37.56	37.93	39.48	41.08	40.31

Serviced accommodation out of season occupancy rates 00-05(Jan-Apr & Oct-Dec)

Year	2000	2001	2002	2003	2004	2005
%	27.50	26.56	26.59	29.20	31.40	29.74

(Source: Tourism Trends in Devon 2005)

3. South Hams Business Survey 2004

- Tourism & Leisure businesses account for 15.2% of the total employees in the South Hams and 14.7% of the total economic activity.
- 25% percent of businesses in the South Hams stated that more than a quarter of their business came from direct tourism sales.
- 11% percent of businesses in the South Hams stated that more than three quarters of their business came from direct tourism sales

Tourism & Leisure Wages

Wage Band	2004
£10.01 to £13.00 ph	11%
£7.01 to £10.00 ph	12%
£4.61 to £7.00 ph	48%
Up to £4.60 ph	25%

Tourism & Leisure Employee Type

	2004
Full Time	11%
Part Time	21%
Seasonal	47%
Volunteers	2%

(Source: South Hams Business Survey 2004)

4. Quality Measurements – South Hams

The following performance indicators are measurable factors that indicate the general health, prosperity and sustainability of the local tourism industry. It should be noted that there are many external influences that can affect these results.

Economic Impact	
Measure	Baseline (2005)
Tourist Nights	4,205,900
Share of Devon Tourist Nights	12.7%
Bed Space Capacity	27,030
Serviced accommodation occupancy rates	Annual – 40.31%
	Out of Season (Jan-Apr & Oct-Dec) – 29.74%
Average daily spend per night	£33.58
Staying visitor spending	£134.1m
Residents attitudes to tourism (2005)	84% viewed the impact of tourism as either very positive or positive.
Information Source	Devon Tourism Trends 2004-2005 South Hams Community Consultation Survey 2005 - Tourism

Business Support	
Measure	Baseline (2005)
Number of South Hams delegates / organisations completing training	93 delegates from 42 organisations
Tourism Forums / attendance	4 forums + social event Average attendance – 40
Information Source	Tourism Skills Network

Investing in Quality			
Measure	Baseline (2005)		
No. of NQAS graded businesses (AA/RAC/SWT Ratings)	Hotels	1 Star – 1	2 Star – 9
		3 Star – 9	4 Star - 3
	Guesthouses, B&Bs, Inns etc	2 Diamond - 1	3 Diamond - 14
		4 Diamond - 33	5 Diamond - 12
	Self Catering	2 Star – 5	3 Star - 31
		4 Star - 56	5 Star - 15
	AA Restaurants & Pubs	Total graded	47
		1 Rosette	6
		2 Rosette	4
		3 Rosette	1
	Holiday Parks	Seafood Specialists	16
		2 Star – 0	3 Star - 2
		4 Star - 12	5 Star - 1
		Michelin Stars RAC/AA Dining Awards Les Routiers	Michelin – One 1 Star AA - 47 listed, 11 rosette winners, 16 seafood specialists + New Angel voted best restaurant in Britain 2005 RAC – 5 listed, 3 Grade 2 dining awards + 1 RAC Blue Ribbon Les Routiers - Dartmoor Union voted dining pub of the year 2006
	SWT Excellence Awards	2006 - 4	
Information Source	South West Tourism, AA, RAC, Michelin, Les Routiers		

Environment	
Measure	Baseline (2005)
Number of visitors citing quality of the environment as a reason for their visit	78% (2003)
No. of GTBS accredited businesses	52
Number of tourism businesses involved in Visitor Payback Scheme	40
Funds raised by visitor payback	£4,000 pa
Blue Flag & Seaside Awards	Blue Flag – 3 Seaside Award - 9
MCS Good Beach Guide	13 Recommendations
Information Source	South West Tourism, South Hams District Council, ENCAMS, Marine Conservation Society

Visitor Satisfaction	
Measure	Baseline (2003)
Visitor Satisfaction	<ul style="list-style-type: none"> • On a scale where 1 was very poor and 5 was very good, visitors rated the South Hams as 4.1. • 84% of visitors felt their holiday was good value for money • 99% of visitors said they would return
Information Source	South Hams Visitor Survey

Appendix D – Consultation Process

There have been a number of stages to the consultation process:

- | | |
|---------------------------------------|--------------------|
| • Tourism Forum workshops | February 2005 |
| • Tourism Businesses focus groups | March 2005 |
| • Prosperity Policy Development Group | June 2005 |
| • Joint Community Consultation | July / August 2005 |
| • SHDC Officers' Consultation | November 2005 |
| • Prosperity Policy Development Group | November 2005 |
| • Business Consultation | May 2006 |
| • Prosperity Policy Development Group | July 2006 |
| • Officer & Member Working Group | September 2006 |
| • Prosperity Policy Development Group | January 2007 |
| • Prosperity Policy Development Group | March 2007 |
| • Council Executive | April 2007 |

A summary outcome of each completed stage has provided the following headlines:

1. Tourism Forum Workshops

Forum attendees ranked the areas they felt the Council should support:

1. Support for TICs
2. Domestic Marketing
3. Niche Marketing e.g. Arts, heritage, marine, food & drink
4. Green Tourism
5. Local Visitor Information

2. Tourism Businesses Focus Groups

Various visions for the next 5 years were suggested by the two groups including:

- Sustainable all year round destination
- Private & public sector working together to market area
- Outstanding, excellence in green tourism
- Be seen as quality destination – looks, pubs, et etc

3. Joint Community Consultation

This consultation was carried out over the summer of 2005

- The business sector most frequently cited by respondents as the one SHDC should focus on was 'Tourism and Leisure' (64%).
- Majority of respondents (84%) felt, overall, tourism had a positive impact on the South Hams, with a quarter of these (26%) feeling the impact was 'very positive'.
- Creating jobs (70%) and creating income (71%) identified as the two main positive impacts of tourism by respondents.

- Traffic congestion was identified as the primary negative impact of tourism (81%). This was followed by low wages and seasonal employment (55%)
- Council should concentrate tourism resources on marketing the South Hams as a destination, with three-fifths (59%) of respondents selecting this as a priority. This was followed by prioritising support or local Tourist Information Centres (50%), improving the quality of visitor experience (48%) and niche marketing (48%).

4. Member Working Groups Policy Development Groups

A series of policy development groups and member consultations were here held during 2005. The following recommendations made by the Prosperity Policy Development Group were accepted by the Council's Executive on the 25th January 2007:

- a. That the Council starts a phased withdrawal from tourism marketing activity with the development of a strong local area partnership involving all tourism stakeholders taking over promotion and marketing aspects of the service;
- b. That the tourism service will focus its activities on the development of green tourism, cultural tourism and product development with links to maintenance and improvement of the public realm in accordance with Council priorities CP3 and CP4, and the emerging Public Space Strategy.

Appendix E – Background Documents

- Tomorrow's Tourism – a growth industry for the new Millennium, DCMS, 1999
- Tomorrow's Tourism Today – DCMS, 2004
- Towards 2015 – Shaping tomorrow's Tourism, South West Tourism, 2005
- South West Tourism Sustainability Plan, 2005
- Regional Economic Strategy for South West England 2006 to 2015 SWRDA, 2006
- South Hams Tourism Visitor Survey 2003
- South Hams Tourism Business Survey 2003
- South Hams Sustainable Community & Prosperity Strategies 2006/7
- South Hams Local Development Framework
- Emerging South West Regional Spatial Strategy 2006 - 2026
- SHDC Consultation Survey 2005 (Economy, Tourism & Community)
- Devon Tourism Trends 1999 – 2005
- Devon Non-visitor Brand research, 2004 - 2005
- Discover Devon Naturally Green Paper, Devon County Council, September 2005
- Economic Value of Tourism in the South West, South West Tourism, 2003
- Life into Landscape South Hams Visitor Survey, South West Tourism, 2005