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1 Tourism

1 Tourism

1.1 Summary

Cornwall is recognised as one of the top three UK tourist destinations. Tourism is important to the economic, social, cultural and environmental well being of Cornwall. Taking into account key messages from the evidence available, the main spatial planning issues are:

Issue T1 – The Core Strategy should explore options to ensure that the tourism industry can develop in a sustainable way and thrive by maintaining, enhancing, and embracing opportunities relating to existing and new visitor experiences/facilities and the role of existing resorts.

Issue T2 – The Core Strategy can set the framework for providing an appropriate balance and mix of good quality, sustainable accommodation.

1.2 Purpose

This is one in a series of papers dealing with a specific theme. Each can be read in isolation or together with other papers to gain a wider understanding of issues facing Cornwall. This paper sets out the evidence base and the policy context for tourism and describes how the issues that need to be addressed in relation to tourism could be taken forward in the Core Strategy. These papers will form the first stage of the development of options for Core Strategy policy. Other issues papers available in this series include:

- *Housing*
- *Economy*
- *Retail & town centres*
- *Education & skills*
- *Social inclusion*
- *Crime & anti-social behaviour*
- *Sport recreation & open space*
- *Health*
- *Transport & accessibility*
- *Energy*
- *Climate change*
- *Soil, air & water quality*
- *Flooding, drought & water consumption*
- *Biodiversity & geodiversity*
- *Landscape & seascape*
- *Historic environment*
- *Design & efficient use of resources*
- *Agriculture & food*
- *Coast & maritime*

- *Minerals*
- *Waste*

This series of papers is closely linked to the topics of the Sustainability Appraisal (SA) scoping report. The SA scoping report identifies the sustainability objectives, decision making criteria and indicators against which the LDF and other plans in Cornwall should be tested, to examine whether plans are sustainable. The SA scoping report also identifies key messages from national, regional and local plans for the Cornwall LDF, a baseline and sustainability issues for each topic. These Core Strategy issue papers largely build on the SA scoping report and start to examine in greater detail the messages from evidence and research, the opportunities and threats and planning issues that need to be considered in the Core Strategy (the SA scoping report can be found at <http://www.cornwall.gov.uk/environment-and-planning/planning/planning-policy/cornwall-local-plan/>)

1.3 What is tourism?

Tourism⁽¹⁾ can be described as people travelling to places away from home that are not part of their usual routine - for leisure, business or other purposes - for the day or to stay overnight.

Whilst all topics are interlinked, tourism has very strong links to the local economy & regeneration, as well as sport, recreation & open space, landscape & seascape, historic environment, and the coast.

1.4 Tourism 'portrait' of Cornwall

Cornwall is recognised as a top UK tourist destination. It is particularly well known for its high quality natural, historic and marine environments, its beaches, resorts such as Newquay, and iconic attractions like the Eden Project, the Maritime Museum, and Tate St Ives. 36% of the coast is managed by the National Trust. In 2007 almost 4.85 million overnight visitors came to stay in Cornwall, spending about £1.2 billion, with almost 10 million same-day visitors spending £430 million⁽²⁾.

Cornwall was voted Britain's number one UK holiday destination in 2008⁽³⁾.

About 37,000 people (full time equivalents) were employed directly or indirectly in tourism in 2007⁽⁴⁾ in the county, making it one of the key economic sectors for Cornwall.

Some of the top 'pay to enter' attractions in Cornwall in 2007 include⁽⁵⁾:

- Cothele (115,916);
- Eden Project (1,128,107);
- Lanhydrock House and Gardens (185,842);
- Newquay Zoo (199,121);

1 Tourism is defined by the World Tourism Organisation (WTO) as comprising the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes, and refers to all activities of visitors including both "tourists (overnight visitors)" and "same-day visitors" – DCLG (2006) Good practice guide on planning for tourism.

2 South West Tourism (2009) The Value of Tourism 2007: Cornwall

3 TripAdvisor Poll (2008)

4 South West Tourism (2009) The Value of Tourism 2007: Cornwall

5 South West Tourism (2008) South West Attractions 2007

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- St Michael's Mount (203,472);
- Minack Theatre and Visitor Centre (171,846);
- Tintagel Castle (177,498);
- Trebah Gardens (100,092);
- Trelissick Gardens (112,497); and
- Truro cathedral (140,000).

More information is available from:

- Visit Cornwall - <http://www.visitcornwall.com/>
- South West Tourism Regional Data – <http://www.swtourism.org.uk/>

1.5 What is the role of the Core Strategy?

The Core Strategy can provide planning policies that help deliver enhancement and protect environmental standards for the benefit of local communities. In developing these policies, the Core Strategy needs to take into account all other relevant plans, strategies, policies and programmes as well as involve key stakeholders and the community. The Core Strategy has a role to play in tourism in that it can:

- Provide criteria based policy that will ensure the tourism industry can develop sustainably and thrive;
- Allocate sites for the development of appropriate new tourism related facilities;
- Ensure that tourism is seen as an important but not dominant industry in Cornwall so that the county does not over rely on the benefits that it brings; and
- Ensure that development does not have any negative impacts on the natural, historic and marine environments.

1.6 Relevant policy context and key evidence

When preparing the Core Strategy, the Council does not start with a blank sheet of paper. There is a whole series of policies at national and regional level which have to be followed and the Core Strategy needs to be prepared within the framework set by national and European legislation and national & regional guidance. This section focuses on the most relevant published legislation, plans & strategies and draws out their key messages for the Core Strategy. The key directives, acts, plans and strategies identified and used are:

International / European

- A renewed EU Tourism Policy: towards a stronger partnership for European tourism – European Commission (2006).

National

- Planning Policy Statement 1: Delivering Sustainable Development (February 2005)
- Planning Policy Statement: Planning and Climate Change: Supplement to PPS1 (December 2007)

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- Planning Policy Statement 4: Planning for Sustainable Economic Development (December 2009)
- Planning Policy Statement 7: Sustainable Development in Rural Areas (August 2004)
- Good Practice Guide on Planning for Tourism (May 2006)

Regional

- Towards 2015: Shaping Tomorrow's Tourism (January 2005)

Local

- Tourism Strategy for Cornwall 2000-2010 (2000)

1.7 Relevant evidence and research

Tourism is of crucial importance to the economic, social and environmental well being of Cornwall – it generates significant revenues, provides thousands of jobs, supports communities and helps maintain and improve countywide assets. The planning system has a vital role to play in terms of facilitating the development and improvement of tourism in appropriate and sustainable locations.

Cornwall as a destination

In 2007, there were 4,850,000 overnight visitors to Cornwall, staying for about 25 million nights and spending more than £1 billion. 19% of all overnight trips to the South West are to Cornwall, and just over a quarter of nights (26%) and money (26%) to the South West are spent in Cornwall. The reasons for visiting Cornwall are given as 85% for a holiday, 3.7% for business tourism, and 9.9% for visiting friends and relations. 10.3% of day visitors to the South West spend their time in Cornwall⁽⁶⁾.

While the overseas visitor market is relatively small (5%), the County performs well in terms of the domestic market and about 90% of visitors are repeat visitors⁽⁷⁾. Analysts are predicting that visitor numbers are set to grow over the coming decade, meaning tourism has the potential to deliver significant economic benefits in the future⁽⁸⁾. In the short term the industry could benefit from the current economic climate with UK holidaymakers choosing a domestic holiday rather than an overseas one⁽⁹⁾, and visitors from European countries with good transport links into Newquay Cornwall Airport.

The number of visitors to Cornwall raises some questions about the capacity of some areas to accommodate additional visitors in the main summer season. Destination management and marketing is used to direct people positively to locations in the County to ensure that all visitors enjoy their time in Cornwall.

6 South West Tourism (2009) The Value of Tourism 2007: Cornwall

7 Cornwall & Isles of Scilly Economic Forum (December 2008) Tourism

8 South West Tourism/SWRDA (2005) Towards 2015: shaping tomorrow's tourism

9 Cornwall & Isles of Scilly Economic Forum (December 2008) Tourism

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Cornwall as an experience

Many visitors have a very clear idea of what they want to do while on holiday, and will go where they know they can do it, and will be helped to do it. Cornwall is in a great position to take advantage of this trend towards matching experience to destination as so many of our destinations and natural assets can help deliver world-beating experiences. Key tourism experiences include:

- Traditional family holidays.
- Casual outdoor activities.
- Adventure activities.
- Sports tourism, including surfing.
- Indulgence/pampering.
- Nature-based tourism.
- Business tourism.
- Heritage tourism.

Accommodation, occupancy and seasonality

The quality and provision of accommodation in Cornwall is clearly important to the health of the tourism industry, and the industry needs to focus on maintaining and enhancing the diversity, quality and provision of the accommodation available and to ensure that market driven quality and innovation are encouraged.

In some parts of the region and in coastal resorts in particular, there is some concern about the loss of high quality serviced accommodation stock such as hotels, to other uses, and that there is too much un-serviced accommodation such as self catering apartments. It has to be recognised that the accommodation market is very fluid, and losses as well as gains are to be expected. The situation should continue to be monitored against the needs of the chosen growth market segments.

The summer school holidays are seen as the key visitor period to Cornwall and more recently good levels of occupancy are being achieved in the shoulder months of March – May and September - October. Seasonality patterns may change in the future as the climate changes.

Economy, Employment and Earnings

It is estimated that Gross Value Added (GVA) for the sector in Cornwall was about £896 million, equal to 13% of total GVA in 2006.⁽¹⁰⁾

There are about 3,300 business units in the tourism sector in Cornwall. The number of units has increased by 15% between 1999 and 2006, compared to 13% across the South West and 8% across Great Britain⁽¹¹⁾.

10 Cornwall & Isles of Scilly Economic Forum (December 2008) Tourism

11 Cornwall & Isles of Scilly Economic Forum (December 2008) Tourism

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Cornwall's economy is thought to suffer because, although tourism makes a major contribution to GDP, pay in the sector is low compared to national average pay rates. Career opportunities are limited and jobs are perceived as being of a seasonal nature⁽¹²⁾, although this may change as efforts are made to make tourism a more all year round contributor to the economy

Tourism accounted for about 22% of Cornwall's employment in 2007, equating to about 37,647 full time equivalent workers. 79% of these jobs are related to spending by overnight visitors and 21% by day visitors. This is further broken down to the following direct employment areas:

- 33% in accommodation;
- 15% in retailing
- 30% in catering;
- 14% in attractions and entertainment; and
- 5% in transport⁽¹³⁾.

Using a broad definition of tourism, it has been estimated that between 1999 and 2006, employment in the tourism sector has increased by 66% in Cornwall compared to 23% across the South West and by 11% across Great Britain⁽¹⁴⁾.

The priority challenge for tourism development is to support targeted sustainable development that will produce higher paid and / or all year employment for local people. Additional information on increasing skills and encouraging more well paid, good quality jobs in Cornwall can be found in the 'economy and regeneration' and 'education and skills' papers.

Transport and Newquay Cornwall Airport

Transport links continue to cause both visitors and the industry concern as the car remains the dominant means by which people visit Cornwall. While huge improvements have been made in terms of the airport and the dualling of the A30 at Goss Moor, the east of the County now bears the brunt of the summer holiday bottlenecks which are now a regular feature on the A30 in the Temple area. Public transport is still perceived to be very poor⁽¹⁵⁾, although the rail network is available to many coastal and inland destinations, and there are some good examples of sustainable travel opportunities (e.g. Eden Project) available in the area. Newquay Airport provides for a relatively quick and affordable route into the County. The airport has seen an increasing role in recent years for inbound tourism. The Airport plans to attract 700,000 air travellers per annum by 2012 and significant growth in the international market is anticipated. See the Transport & Access paper for more information.

Sustainable tourism

Whilst tourism can provide a significant opportunity to enhance destinations and attractions by generating economic return and reinvestment, it can place burdens on an area's natural and heritage resources, and contribute to global warming because of increased travel.

12 Cornwall Tourism Forum (2004) Cornwall Tourism Forum Action Plan: the way forward

13 South West Tourism (2009) The Value of Tourism 2007: Cornwall

14 Cornwall & Isles of Scilly Economic Forum (December 2008) Tourism

15 Cornwall & Isles of Scilly Economic Forum (December 2008) Tourism

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Sustainable tourism or 'One Planet' tourism is tourism that operates within the economic, environmental and social limits of the one planet we have available; and contributes back into that planet's economic, environmental and social well-being. This is the aim of the Cornwall Sustainable Tourism Project (CoAST).⁽¹⁶⁾

1.8 Emerging Evidence and Policy

The gathering of evidence is an iterative process and must be continued throughout the preparation of the Core Strategy. Additional evidence should be considered right up to the 'submission' stage in the process. Listed below are the known emerging relevant guidance & studies, which will be taken into account if available before the submission of the Core Strategy:

- Cornish Tourism revised priorities (Visit Cornwall)
- Work underway as part of the CoAST project.
- Work underway on the European Charter for Sustainable Tourism in Protected Areas (Europarc)
- Green Peninsula
- The refresh of Towards 2015: Shaping tomorrow's tourism
- Green Paper for Culture, Cornwall Council (2010)

1.9 Gaps in Evidence

There are concerns about losses of some types of tourist accommodation, not helped by a lack of information on the availability of tourist accommodation in Cornwall. It is recommended that evidence be collected and the situation be monitored.

Anecdotally, tourism has a reputation for low pay. Information is not available on earnings in the tourism sector in Cornwall, but national figures indicate that generally they are 50% of the median level, i.e. 50% of e.g. the full time median for Cornwall of £388.30 per week (2008). Evidence can help to monitor this situation.

Transport concerns continue to be an issue and the car remains the dominant means of travel for visitors. Information is needed on encouraging alternatives – and this issue will be explored further in the transport paper.

Additional research may also be required to understand how climate change will impact on the tourism industry and to help identify those areas that are more vulnerable to these changes. Work currently underway on the Resource Efficiency Analysis Programme (REAP) at a regional level may assist with this.

1.10 Key Messages from the Evidence Review

A number of key messages and issues were drawn out from the evidence review. The table below identifies the messages deemed most relevant and the source documents.

Table 1.1

Message	Relevant Document(s)
<p>Need to ensure that the tourism industry can develop and thrive by:</p> <ul style="list-style-type: none"> • Understanding the capacity of the area and undertaking positive destination management and out of main season marketing of visitors. • Maintaining and enhancing existing visitor experiences in sustainable locations; • Embracing opportunities for incorporating new visitor experiences into tourism offer. • Adapting to the consequences of a changing climate by increasing resilience to the risks and embracing new opportunities. 	<p>PPS1</p> <p>PPS4</p> <p>PPS7</p> <p>Planning for Tourism</p> <p>Tourism (C&IOS EF)</p> <p>North Cornwall Tourism Sector Study</p>
<p>Promote sustainability throughout the industry by:</p> <ul style="list-style-type: none"> • Conserving, enhancing and restoring the natural, historic and marine environments. • Investing in improving the quality of existing attractions and destinations, rather than investing in and promoting major new high profile attractions. However, if such attractions are proposed, support should be given as long as those attractions are not detrimental to achieving more sustainable tourism • The use of sustainable construction and the local sourcing of materials; • Retention and maximising visitor spending in the local economy; • Meeting the training needs of potential employees in the industry locally and increase numbers of permanent and higher level jobs; • Extension of the season where environmentally, socially and economically viable and acceptable; and, • Achieving sustainable accessibility and reducing the need to travel, in order to reduce greenhouse gas emissions. 	<p>PPS1</p> <p>PPS4</p> <p>PPS5</p> <p>PPS7</p> <p>PPS9</p> <p>PPG20</p> <p>Towards 2015 (SW Tourism/SWRDA)</p> <p>CoAST</p>
<p>Maintain and enhance the diversity, quality and provision of existing facilities and accommodation:</p> <ul style="list-style-type: none"> • Maintaining an appropriate balance in the stock of accommodation. 	<p>PPS4</p> <p>PPS7</p>

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<ul style="list-style-type: none"> • New facilities allowed only where viable, sustainable, and of an appropriate scale. • Opportunities encouraged where appropriate and sustainable to increase provision to meet particular market need or spatial gap. For example, upgrade of existing provision into more up-market sectors. 	
<p>Regeneration through tourism – realising the potential of the environmental, cultural and heritage assets:</p> <ul style="list-style-type: none"> • Regeneration of some of Cornwall’s coastal towns may be reliant on tourism. • Town centres can offer residents and tourists entertainment in the form of theatres, cinemas, night clubs, shops and restaurants, etc, and can lead to improvements in the night time economy generally. 	<p>PPS4</p> <p>PPS5</p>
<p>Reducing seasonality remains a focus in the sector despite the significant improvements seen in occupancy rates during the shoulder months.</p>	<p>Tourism (C&IOS EF)</p>
<p>Transport links maintenance and improvement (inc Newquay Airport) and the encouragement of sustainable travel opportunities</p>	<p>Tourism (C&IOS EF)</p>
<p>Recruitment and retention of staff :</p> <ul style="list-style-type: none"> • Improve through better training and career opportunities; • Wage rates will improve, and • Preparations will be in place for fewer migrant workers being available. 	<p>Tourism (C&IOS EF)</p>

1.11 SWOT Analysis

Table 1.2

Strengths	Weaknesses
<ul style="list-style-type: none"> • One of the UK’s top holiday destinations • Can offer good range of experiences • Environment (natural and built) including the importance of beaches, surfing, and other water based activities • Major employment sector (in terms of the proportion of people employed) 	<ul style="list-style-type: none"> • Major employment sector (in terms of gap left if the sector fails) • Occupancy levels in accommodation outside of the main season • Seasonality issues • Lower wage sector • Limited career opportunities and training

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<ul style="list-style-type: none"> • Family school holiday market • Good range of quality serviced and un-serviced accommodation • Good rail links to many coastal resorts 	<ul style="list-style-type: none"> • Some reliance on migrant workers • Reliance on road transport • Public transport • Reliance on good weather
<p>Opportunities</p>	<p>Threats</p>
<ul style="list-style-type: none"> • New domestic visitors because of the recession – they will return if they have a good experience • Adventure tourism – surfing established but could encourage others such as kayaking, kite surfing, coasteering, etc. • Sports tourism – golf and sailing popular in some areas but not all, increased opportunities for fishing could be particularly relevant • Indulgence/Pampering tourism– higher end visitors – e.g. Rick Stein & Fifteen, trend/spa facilities, etc. • Business tourism – combining business and adventure/sports/ indulgence tourism • Nature based/green tourism • Overseas visitors – more attractive for short breaks via low cost air travel • Short breaks out of season • Newquay Airport • Regeneration of some towns • Improving and developing the existing offer. • New transport options to serve tourists and locals alike • Packaged experiences aimed at key niche markets • Heritage tourism including the Cornwall and West Devon Mining Landscape World Heritage Site • Cultural tourism, events and festivals • Additional indoor facilities 	<ul style="list-style-type: none"> • Loss of some serviced and un-serviced accommodation types • Sustainability of sector • Reliance on air and road transport – carbon footprint of visitor travel • Smaller businesses may find it harder to adapt to the impacts of climate change than larger organisations • Negative behaviours of some visitors – is the financial benefit outweighed by other dis-benefits • Increasing overseas competition - how Cornwall can improve its position whilst sustaining and improving its overall offer • Over reliance on tourism in some economies to drive the well being of the economy, and this can have a drastic impact during turbulent times such as foot and mouth. • High level of leakage of tourism spend through subsequent rounds of spend • Tourism employment can be low paid, low skilled, seasonal and offering poor working conditions • Tourists can place undue pressure on certain amenities and infrastructure designed for local needs • Tourism traffic does increase pressure on local roads • Impact on the natural, historic and marine environment • Impact of sea level rises and climate change on beaches and coastal locations

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<ul style="list-style-type: none"> • Climate change may extend season and attract new visitors • Promotion, conservation and enhancement of the natural, historic and marine environments 	<ul style="list-style-type: none"> • Extreme weather patterns can discourage visitors and damage local businesses/environments (e.g. flooding) • Climate change may extend the tourist season and this could increase pressure on local facilities
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1.12 Climate Change Considerations

The main pressures on tourism from climate change may be:

- Rising fuel costs and the need to reduce carbon emissions may lead to fewer British people holidaying abroad, which could increase demand in Cornwall
- The predicted warmer drier summers may increase the demand for holidays in Cornwall
- Coastal erosion may increase in speed through an increase in stormy/ severe weather events and this may threaten tourist accommodation/attractions and destinations
- Sea level rise will affect coastal areas and may threaten holiday accommodation/attractions and destinations

Climate change is further explored in a separate issues paper in this series, as well as in the Sustainability Appraisal Scoping Report (visit www.cornwall.gov.uk). The scoping report sets out a series of sustainability objectives against which the Core Strategy and other parts of the LDF will be assessed, to gauge how far they will promote sustainable development. The relevant objective for economic development, regeneration and tourism states the need:

'To support a balanced and low carbon economy that meets the needs of the area and promotes a diverse range of quality employment opportunities'

1.13 Main Spatial Planning Issues

Taking into account the key messages from the current evidence available, the following spatial planning issues have been identified.

Issue T 1

The Core Strategy should explore options to ensure that the tourism industry can develop in a sustainable way and thrive by maintaining, enhancing, and embracing opportunities relating to existing and new visitor experiences/facilities and the role of existing resorts.

Issue T 2

The Core Strategy can set the framework for providing an appropriate balance and mix of good quality, sustainable accommodation.

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These issues will work towards achieving the following long term objectives for Cornwall as set out in the Sustainable Community Strategy - 'Future Cornwall':

- To become a market leader in innovative business and low carbon technologies ; increase productivity and raise quality across the economy
- To enhance and build a robust network of small and medium businesses to secure Cornwall's economic stability
- To make the most of our environment, reduce greenhouse gas emissions and invest in and promote sustainable use of natural resources

This paper summarises the evidence on tourism brought together to inform the Cornwall Core Strategy. However, it will be added to and kept up-to-date as other relevant evidence becomes available. In updating these papers all previous versions will be archived to ensure it is clear what evidence was available at each stage.

1.14 Appendix A

Appendix A

Consultation to date:

The Issues papers were first published for stakeholder consultation in September 2009. The papers were amended to take into account consultee responses and were then circulated to Planning Policy Advisory Panel members in November 2009. They were also given to all members at a series of three area based consultation events in March 2010.

Revisions to Issues Papers:

In writing the draft Issues and Options report in March 2010 it was clear that it was necessary to revise the issues identified in some of the topic based issues papers. Some issues were requirements under other legislation or procedural matters, and therefore options could not be set against them (*e.g. The Core Strategy should work with other plans and programmes...*) Others were in fact options and needed to be set as options under an overarching issue (*e.g. The Core Strategy has a role in supporting the growth and sustainability of the micro and small business economy*). There was also some repetition between different topics and these issues could be amalgamated.

Criteria for Changes:

The issues have been rationalised against the following criteria:

- Is this a Spatial Planning Issue?
- Is the issue covered by other legislation?
- Can options be generated against each issue?
- Is this an issue and not an option?
- Is the issue rooted in evidence?
- Is there potential to amalgamate issues?

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Issues in Consultation Version:

Issue T1 – The Core Strategy should explore options to ensure that the tourism industry can develop and thrive by maintaining, enhancing, and embracing opportunities relating to existing and new visitor experiences and the role of existing resorts.

Issue T2 – Set the context for providing an appropriate balance and mix of good quality, sustainable accommodation and facilities.

Issue T3 – Promote sustainability and adaptations to the impact of climate change throughout the industry through design, accessibility, skills training, transport, etc.

Issue T4 – Consider mechanisms for reducing the negative impacts of tourism on the social, economic and environmental well being of local communities.

Revised Issues:

Issue T1 – The Core Strategy should explore options to ensure that the tourism industry can develop in a sustainable way and thrive by maintaining, enhancing, and embracing opportunities relating to existing and new visitor experiences/facilities and the role of existing resorts.

Issue T2 – The Core Strategy can set the framework for providing an appropriate balance and mix of good quality, sustainable accommodation.