



Tourism ExSEllence

The Strategy for Tourism in the South East



Detailed Strategy

TOURISM
SOUTH EAST



Tourism ExSEllence

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Foreword



This strategy for tourism has been prepared by Tourism South East on behalf of the region. It has been subject to substantial consultation and discussion in order to take into account the views of stakeholders across the entire region. Tourism South East has taken the lead with the active involvement and endorsement of the South East England Development Agency (SEEDA) which has the statutory responsibility for tourism strategy in our region.

Our intention is to give an overarching vision and sense of purpose to a vital industry made up of diverse interests and stakeholders. To compete we need to harness the energy of the industry and work together to provide the high levels of service and product quality which customers increasingly expect.

This document is a regional overview which sets out a direction for tourism in the South East for the next 3 to 5 years. It will be augmented by a suite of sub regional frameworks, to form a dynamic and adaptable strategy subject to regular review and evaluation.

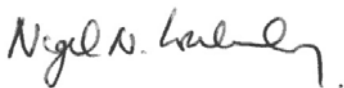
To succeed we must have a clear sense of direction and a unifying vision for the future. Tourism is very important to this region. It generates in excess of £10 billion per annum, supports over 225,000 jobs and plays a vital role in the powerhouse economy of the South East, generating wealth and supporting investment for the future.

The key tasks facing us are:

- making the most of our locational advantages
- co-ordinating public and private sector resources to best effect
- building real partnerships
- improving product quality and standards of service
- concentrating marketing on those brands which mean most to consumers
- developing the vital role of training for the people working in our industry

Tourism has the potential for further sustainable growth. Realising this and translating strategy into action will require the active involvement and engagement of all stakeholders.

We commend this strategy to you and look forward to working with you to achieve the ambitions of Tourism ExSEllence.



Nigel Walmsley
Chairman
Tourism South East



1. Introduction

We believe tourism in the South East has the potential to compete with the best the world has to offer. This document sets out how we can start to turn that vision into reality.

What do we mean by tourism ?

We use the word tourism in its widest sense to embrace the whole visitor economy. This includes people from overseas and the UK, staying overnight or on leisure day trips, for business, holidays or visiting friends and relatives, and the industry that makes all this happen.

Why we need a strategy

Tourism is already an important force in the South East generating an estimated £10bn of spending a year and supporting 225,000 jobs. There are few places and businesses in the Region which remain untouched by this activity.

We believe it has potential to grow and generate even more benefit. This growth will only be realised, however, if everyone involved in tourism subscribes to a common agenda and is prepared to change and invest for the future. A sustainable and successful tourism sector won't just happen – it requires some planning, co-ordination and management. This strategy provides the framework.

The strategy is a starting point not an end in itself. We intend to change, update and refine it on an ongoing basis as new information and evidence becomes available which is why we have adopted a web-based 'live' format.

Aimed at all stakeholders

This strategy sets a direction for the next five years. It is a plan for all tourism stakeholders in the Region not just Tourism South East (TSE) and the South East England Development Agency (SEEDA). It is aimed at tourism businesses, tourism associations and trade bodies, the 'not for profit' sector, local authorities and communities, regional agencies and government. Tourism by its very nature crosses boundaries and sectors. All of the above have a role to play in shaping the future of tourism. Joined-up thinking and action is essential if we are to realise our true potential.

Many people across the Region have already contributed to the production of this strategy either by responding to the original consultation exercise in January on the headline strategy or participating in one of the six sub regional planning workshops held in April. This involvement has been invaluable in shaping the final document and the process will continue to ensure the strategy remains current and relevant.

What this report contains

We have tried to keep this document short and accessible. The issues and problems facing the Region are widely recognised and understood - the emphasis of the strategy therefore is on the action that is required rather than an exhaustive analysis of the current and past situation. For those who want to explore areas in more depth there are links from this document to key sources of supporting information and these will be added to over time.

The strategy falls into four parts:

1. An overview of tourism in the South East and the challenges it faces (Chapters 2 & 3).
2. Our vision of where we want to be and the aims and principles underpinning the strategy (Chapter 4 and 5).
3. What we are going to do and where the priorities lie, grouped under three key objectives. (chapters 6-8)
 - Promoting a must visit Region
 - Providing an unrivalled experience
 - Establishing effective management and organisation
4. A set of sub-regional frameworks identifying initial priorities in each of the 6 sub-regions are under preparation and will be added as they evolve in the autumn (a summary of the process underway is shown in chapter 9).

A summary of this strategy – The Regional Overview – is also available on the web-site www.visitsoutheastengland.com

2. Tourism – supporting regional prosperity

Few parts of the Region are untouched by tourism. Tourism is not just about people on holiday; it also embraces leisure day visits, visits to friends and relatives, and business and conference tourism. It generates significant numbers of jobs, impacts on local communities, provides a lifeline to large numbers of businesses, and is a powerful tool for regeneration. It also, of course, brings benefits and enjoyment to those who take part.

Tourism in the South East

- £10bn contribution to the economy
- 7% of regional GDP
- 400,000 employed in tourism related sectors
- 225,000 FTE jobs supported by tourism
- 35,000 businesses involved

The importance of tourism

An economic force to be reckoned with

Day and staying visitors spent an estimated £10.5bn in the Region in 2002. This is equivalent to 7% of regional GDP. £1.3bn of this spending comes from overseas visitors and from outside the Region. This is essentially the same as export earnings in terms of benefits to the SE Region.

Generating jobs and supporting businesses

Tourism spending benefits more than just hotels and visitor attractions. Three quarters of visitor spending goes to enterprises outside the accommodation sector- to shops, pubs, restaurants, garages, train operators, museums, cinemas and theatres etc. These enterprises in turn support other businesses across a wide range of sectors.

400,000 people are employed in the Region in tourism related sectors with an estimated 225,000 jobs supported by tourist spending.¹ Other studies have estimated that visitor spending in the Region supports some 250,000 FTE jobs taking into account both direct and indirect impacts.²

There are in excess of 8000 accommodation establishments known to TSE but many more businesses are dependent upon tourism to some extent or other. A recent study estimated this to be in excess of 35,000.

¹ Putting the pieces together - A skills development strategy for the South East. 2002

² Creating a World Class Tourism Destination

Making the Region a better place to be

Tourism also delivers other benefits to the Region. It can act as a potent force for regeneration and renewal providing new life for old industrial areas. It is also, as Foot and Mouth Disease (FMD) demonstrated, a key strand in the rural economy.

Tourism helps to provide support for a wider range of social and cultural amenities, from post-offices and pubs to museums, which add to the quality of life for local residents. Many of these would not be viable without visitor spending.

Tourism also promotes a positive image for the Region which makes it a more desirable location for both people and investment and generates local pride.

Potential for growth

During the past five years tourism has actually grown in volume in the Region. The consensus is that there is potential for further growth and the Region is well placed to exploit this.

Helping to deliver the Regional Economic Strategy

SEEDA's aim is that "by 2012 the South East will be recognised by all as one of the world's 15 top performing regional economies, as measured by a broad range of economic, social and environmental indicators" .

To achieve this the Regional Economic Strategy embraces the principles of sustainable development and seeks to meet five key objectives:

- Competitive businesses
- Successful people
- Vibrant communities
- Effective infrastructure
- Sustainable use of natural resources

The tourism strategy embraces these themes and will help SEEDA deliver its programme by:

- Building **competitive businesses** by helping the tourism sector to adapt, change and thrive.
- Growing **successful people** by encouraging and equipping people to make the most of the opportunities offered by a career in tourism.
- Creating **vibrant communities** by using tourism as a force for regeneration of towns and resorts and to underpin the rural economy.
- Developing **effective infrastructure** by using tourism to support transport and other improvements.
- Promoting **sustainable use of natural resources**. A high quality environment is the driver of tourism and tourism is a valuable component of sustainable land management.

The strategy is also in line with the priorities identified in SEEDA's Tourism Action Plan.

Linkages with other strategies

Tourism has strong relationships with land-use planning, transport, regeneration, labour issues, sustainability and cultural activities. What happens in these areas is likely to have significant implications for tourism and vice versa. We have reviewed other relevant policy documents to ensure that the tourism strategy is complementary to these.

Key studies and policy reports include:

- Destination South East (SEERA)
- Enjoy England – England Domestic Marketing Strategy (Visit Britain).
- The Cultural Agenda (SEEC)
- Regional Economic Strategy for South East England 2002–2012 (SEEDA)

In addition we have reviewed a wide range of other strategies and documents prepared by partner organisations and stakeholders across the Region.

3. Tourism in the South East

A tourism snapshot

In 2002, the Region attracted 26.5 million overnight stays and 194 million tourism day visits. Together these visitors spent £10.5 billion. The Region attracts more staying visitors than either Scotland or Wales and is the most visited of all the English Regions after London. ([Click here for a LINK to a more detailed statistical breakdown](#)).

Domestic visitors dominate the staying visitor market with two thirds coming from adjoining regions. Almost half are staying with friends and relatives. For every ten staying UK visitors:

- 4 are on a short break
- 2 are on a long holiday
- 3 are visiting friends and family
- 1 is on a business trip

Some facts and figures

- The Region accounts for 1/6 of England's tourism by volume.
- In total, day visitors spend as much as staying visitors although spend per head is much less.
- Overseas visitors account for 1 in 7 staying visits but a much bigger proportion of spending.
- Tourism is not evenly spread across the Region but few places remain untouched by it.
- Holiday tourism is the single biggest sector but other aspects of tourism such as visits to friends and relatives and business tourism account for almost half of activity
- Tourism in the Region is well balanced and is not over-dependent on any one sector.
- Domestic (i.e., UK residents holidaying in the Region) staying tourism has grown but the Region has lost market share. It has performed badly in the growth area of domestic short holidays but better in business tourism.
- Overseas tourism has fallen but the Region has maintained market share

Our tourism assets

The South East is a large Region offering a huge range of experiences aimed at many different types of visitor. It has some significant and enduring strengths which we can build upon such as:

- Well known brands/destinations (eg Oxford, New Forest).
- Beautiful countryside and coast, much of it Areas of Outstanding Natural Beauty and National Parks (eg The New Forest, South Downs, Chilterns, Solent).
- Lively cities, historic towns and villages (eg Portsmouth, Brighton, Canterbury).
- The gateway to Britain and to Europe with a number of major ports and airports.
- Proximity to London and a large affluent catchment population.
- A range, depth and sophistication of attractions and facilities available, reflecting the relative prosperity of the Region. (eg Blenheim, Wisley, Legoland).
- Some iconic events, places and attractions with an international profile (eg Glyndebourne, Henley, Cowes week).
- A good range of accommodation available from caravans to country house hotels.
- An extensive rail network and good connections to London.

But there are also a number of weaknesses and problems which are holding us back.

- Many places are not well known outside the Region.
- The Region is not a single coherent destination but a collection of brands and destinations which makes it difficult to project.
- There are negative perceptions of congestion and overcrowding. The Region does not have a reputation for warmth.
- Accommodation and cost of living is relatively expensive.
- Travel across the Region is slow and tortuous.
- Variable quality of tourism products, services and destinations.
- Difficulties in recruiting, and retaining staff with the right skills.
- Duplication, overlap and lack of co-ordination between the various tourism stakeholders.
- Some antipathy and complacency towards tourism from residents and politicians.

The strategy seeks to build on our strengths and address the weaknesses.

Keeping one step ahead

Planning for the future is not just about addressing the above issues. We live in a rapidly changing world and there are external forces at work which will have major implications for patterns of tourism and the ability of the South East to compete. It is vital that we understand and respond to these changes if the Region is to prosper. Tourism is essentially market driven - if the South East cannot provide what people want then visitors will go elsewhere.

Looking to the future:

- Tourism, both world-wide and in the UK, is expected to show further growth but as recent events have shown (FMD, Gulf War) tourism can be volatile and subject to external shocks.
- Political unrest could benefit destinations such as the South East which may be seen as relatively safe and reliable havens in a turbulent world.
- Economic growth will fuel increased demand for leisure activity and more affluence means rising expectations. Not all groups in society will benefit however and economic growth in the UK may be channelled into outbound rather than domestic tourism.
- Competition is getting stronger both at home and abroad and the South East will have to fight harder to retain its share of tourism.
- New technology is changing the way in which people learn about and buy tourism products whilst high speed ferries and low cost airlines are opening up new markets and destinations.
- A changing population structure and changing lifestyles will create new patterns of demand. The market is becoming more fragmented, less loyal and more volatile. There is an increase in older customers who are healthy, active and not behaving 'old'.
- Changes in our working lives are leading to people taking shorter holidays, more often and booked at the last minute. People are seeking more flexible experiences tailored to their individual interests and needs.
- Our customers are increasingly sophisticated, well-travelled and discerning, demanding better quality and service and looking for rewarding experiences.

4. Making a step change

Our vision for tourism

The ultimate goal of the strategy is to benefit the people who live and work in the Region as well as the visitors themselves. This supports SEERA's vision of , "A prosperous region delivering a high quality of life and environment for everyone, now and in the future." ³

Our aim:

To develop a thriving, competitive and sustainable tourism industry in the Region which generates wealth, promotes environmental quality, enriches the quality of life and brings enjoyment to visitors.

Our vision is of a Region which:

- Competes with the best - a Region which people aspire to visit from the UK and abroad
- Exceeds visitors expectations leaving them eager to return and keen to spread the word to others
- Recognises product and service quality as critical to future success
- Fosters profitable tourism businesses – with a commitment to investing in people and premises
- Welcomes visitors and embraces tourism for the benefits it brings

In short a Region which embodies **Tourism ExSEllence**

Targets

Following the launch of the strategy in consultation with our partners we will establish targets and performance indicators to monitor progress on the strategy. In the meantime we have set ourselves an overall target of increasing our market share of overseas and domestic tourism spend by 5% over the next decade.

This would mean the Region would capture 13% of domestic spend, 15% of overseas spend and 25% of day visitor spend in England.

Where we are now

This is a successful Region. We have some considerable strengths in tourism terms: with a large and dynamic tourism sector, an appealing mix of high quality countryside and attractive towns, a rich and often sophisticated product and an enviable location as the gateway to England with ready proximity to London.

There is everything to play for. Tourism worldwide will almost certainly continue to grow over the next ten years and, all things being equal, we might expect to share in this growth. This will mean more jobs and more prosperity for the Region.

³ Regional Sustainable Development Strategy . SEERA. 2001

However, this will not just fall into our laps. Internally, we face a number of problems and threats such as skills and labour shortages, variable product quality, a low awareness of what we have to offer, pressure on public sector resources, development constraints, and a fragmented industry.

Externally there is huge and growing competition from new products and destinations both at home and abroad, our customers are becoming more demanding and discerning whilst the internet is providing new channels of communication and fresh challenges. There is also a need to ensure that tourism growth is not at the expense of environmental quality.

The need for change

If we are to rise to these challenges and realise our vision we have to change and sharpen up our act. Standing still is not an option and will cause us to fall further behind. The harsh reality is that even though tourism as a whole has shown a modest increase in the Region over the past five years we are also losing market share to other regions in the UK.

This means:

- Focusing more on our visitors, understanding their needs, looking after them and making them feel special.
- Providing a total quality experience at all levels and across all aspects of the visit.
- Offering something different and special which makes us stand out from the pack and makes the South East worth visiting.
- Foreseeing and adapting to change; staying one step ahead of the game instead of playing catch-up.
- Looking inwards as well as outwards and recognising that the tourism sector needs to support of a range of stakeholders if it is to prosper.
- Securing a step change in the way in which we manage and deliver tourism marketing and business support throughout the Region.

In short we have to change to reflect new realities:

- **Change** the way we present ourselves to the outside world.
- **Change** the quality and type of experiences we offer visitors.
- **Change** the way in which we manage and organise tourism.

Reflecting this, the strategy has been built around three key themes:

1. Creating a **'must visit' Region** which people aspire to visit.
2. Providing **an unrivalled experience for the visitor** whilst they are with us.
3. Establishing **effective management and organisation** of tourism support.

Under each of the key objectives we have identified a number of priority areas (14 in all) which will form a focus for action. These priorities build upon the strengths and opportunities identified and also recognise and seek to address the weaknesses and threats. This relationship is illustrated in the accompanying diagram.

Where we want to be - Tourism 2014

- **A sustainable and prosperous industry**, generating more value throughout the year and across the Region.
- **Smart marketing**. Focused around strong brands and themes which strike a chord with customers. Greater awareness of what the Region has to offer and increased interest. Each part of the Region area capitalising on its own special strengths and profile.
- **An outstanding experience**. Welcoming and professional people working in jobs that are valued. Appealing and well-managed destinations providing special experiences. Accommodation, attractions and other facilities offering unrivalled quality and value for money.
- **Effective organisation**.. Rationalisation of organisations involved in tourism. Strong and active engagement of private and public sectors. Widespread support from politicians and local communities with tourism recognised as an essential strand of life in the Region.

Core principles

Running through and underpinning the above are a number of core principles which will dictate the nature and type of initiatives we will pursue. These are the bedrock on which the strategy is anchored and the criteria against which actions should be measured.

Sustainability.

Tourism has potential for further growth but it can only be sustained in the Region if we maintain the quality of the natural and built environment which underpins our appeal and if it is welcomed by the communities where it takes place. Alienating people and destroying the environment will result in inevitable decline. The measures outlined in this strategy will need to be tested against the criteria of sustainable development to ensure that they contribute to economic diversity and stability, protect and enhance the environment, generate benefits for people and communities and minimise the use of natural resources.

Quality

All the evidence indicates that continuing pursuit of quality is the key to future success in tourism. Quality is about exceeding visitors' expectations and providing value, not necessarily about luxurious facilities and is as relevant to a caravan holiday as a 5 star spa hotel.

Innovation

We are not advocating change for change sake but it is important that we critically examine what we have done in the past and look for new and innovative ways to become more effective, reduce cost and deliver new experiences.

Partnership

Tourism is different to most other economic sectors in the range and diversity of people and organisations involved. Success in tourism is critically dependent on good working relationships between public and private sector and between tourism enterprises. This is the key to maximising impacts and reducing duplication.

Priorities for action

Realising the three key objectives and making the strategy happen will require action under each of the 14 priority areas by a range of actors – TSE, SEEDA, local authorities, regional agencies and the private sector. The following section outlines in more detail what we want to see happen under each of these priority areas and identifies a series of actions to be taken by TSE and its partners to address these. The relationship between themes, principles and priorities is shown in the following diagram.

Abbreviations used in the key objectives sections pages 16-29 are:

TSE	Tourism South East
DMO	destination management organisations/local authorities
O	tourism operators/enterprises
A	government and regional agencies
SR	sub regions
VB	VisitBritain
VL	Visit London
DMS	destination management system
CRM	customer relationship management
LSC	Learning and Skills Council
SEEDA	South East England Development Agency
QA	quality assessment scheme
SME	small/medium size enterprise
AONB	area of outstanding natural beauty
DDA	disability discrimination act
TIC	tourist information centre
LA	local authority
TO	transport operator
RTB	regional tourist board
DMP	destination management partnership

5. The strategy process: Summary Chart



6. Key Objective I - Promoting a ‘must visit’ region

Our aim is to raise the level of interest in the Region, and establish it as a desirable and exciting destination which people aspire to visit. To achieve greater impact we will need to become more focused and selective. The Region is now too big and too diverse to be marketed as a single coherent destination. Instead we must treat it as a collection of brands and destinations and recognise that whilst some (eg Oxford, Brighton) have a high profile other destinations are not well known outside the Region. We need to stimulate interest in those places, products and experiences where we have acknowledged strengths and use these to draw people into the Region. We believe there is potential and capacity to attract more visitors but above all we want to get better value, and a bigger and more stable economic contribution from those that do come.

Priority Area 1 - Focus marketing on strong brands and destinations

Our marketing strategy will be to lead with the strong brands that are meaningful to consumers and to put increased resources behind promoting these. This is the only way to make more impact and raise the profile of the Region. It will mean being more selective in what we do and may require some hard choices. Work has already begun on identifying lead brands in the holiday sector and the resulting brand map is being refined in discussion with partners ([For link to Brand Awareness Research CLICK HERE](#)). There is also scope for developing sub brands within the overall brand architecture. Different markets respond to different brands so we will gradually extend this research into other market sectors. The aim is to spread the benefits by using these lead brands as a marketing hook and sell other areas and products in their slipstream.

There is scope to make more use of iconic and high profile events, places and associations that make the Regional special and distinctive such as Cowes, Glyndebourne etc. We will also identify and nurture emerging brands or products which can strengthen our offer in the future such as the R. Thames and the proposed South Downs National Park. This activity will need to be reviewed in the context of sustainability as we must avoid attracting yet more visitors to places which are already over-congested.

Key actions for TSE

Champion brand concept
Consumer research to identify meaningful brands across all sectors
Agree/refine brand architecture for Region with partners
Co-ordinate and support campaigns with partners
PR and marketing support
Identify brands for development and gaps
Evaluate effectiveness

Key actions for our partners

Become brand managers. (DMOs)
Support and respond to research to identify meaningful brands (DMOs, SR, A)
Rationalise marketing activity to reflect brand architecture (DMOs, A)
Build business networks and partnerships in support of brands
Ensure the visitor experience matches brand values (DMOs, O, A)
Participate in brand campaigns (O)
Identify and build new brands (DMOs)

Priority Area 2 - Develop compelling themes and experiences

In addition to destination brands we will identify and develop a series of experiential brands and themes which are not linked to geographical areas but pick up on areas of product strength, interests and activities where the Region excels. This will add to the Region's tourism appeal and open up new market opportunities. It is particularly pertinent to the short break market which is increasingly driven by experiences rather than destinations. It also provides a marketing platform for tourism enterprises and lesser-known places which may find it hard to relate to destination brands.

Themes and experiential brands may be region-wide, relate to individual sub-regions or even cross regional boundaries; some may be niche markets, others may have more general appeal. We will devise and agree a set of criteria for prioritising themes and encourage small groups of interested parties to act as 'theme champions' and take them forward. Themes which have particular relevance to the Region and which will be explored include: gardens, cycling, walking, equestrian tourism, motor sports, maritime/defence heritage, health/well-being.

Key actions for TSE

Identify themes/experiences which are attractive to consumers

Establish criteria for prioritisation

Co-ordinate regional campaigns with partners

Provide PR and marketing support

Use events to generate media interest and develop packages

Evaluate effectiveness and review

Key actions for our partners

Participate in national, regional, and sub-reg thematic campaigns

Identify potential sub regional themes and partners and develop campaigns (SR, DMO)

Stimulate participation and co-ordinate delivery (DMO, A, O)

Evaluate effectiveness DMO, SR)

Priority Area 3 - Develop the potential of all sectors of tourism

If we are serious about growing the visitor economy we will need to explore the potential of all market sectors. Indeed, given the size and diversity of the Region it is impossible to be prescriptive as virtually all market segments are relevant somewhere.

Holidays and breaks are the single biggest sector of discretionary tourism in the Region and we will defend our share of the static long holiday market whilst improving our performance in the buoyant but highly competitive short break sector. We must not neglect other sectors of tourism, however, where the Region has strengths and which are critical to maintaining a thriving tourism infrastructure such as:

- Overseas tourism, where we will continue to work with Visit Britain and key partners to exploit our unique position.
- VFR tourism which is driven by the local population and which is vital to stimulating business for attractions, retail and catering.
- Day visits where the Region can benefit from its large catchment population and the proximity of London and which are core business for attractions and retail.
- Business and conference tourism, key to supporting a viable hotel stock and a major source of tourism for urban destinations such as Brighton, Milton Keynes and Reading.
- Niche markets where the Region has an advantage. These are small in overall volume but critically important to some places and include language learning (Eastbourne, Hastings, Brighton, Thanet, Oxford) yachting (Solent) and equestrian tourism where we have recently researched potential.

Key actions for TSE

Work with VB and partners to co-ordinate overseas marketing

Support local partners in stimulating VFR and day visits

Review opportunities for influencing and expanding business tourism

Co-ordinate and develop regional short break campaigns

Provide marketing support services and market intelligence to partners

Co-ordinate contingency and disaster planning

Key actions for our partners

Evaluate local market priorities and potential

Lead on day visit, business tourism, VFR, EFL campaigns with TSE support (SR, DMOs)

Work with TSE and VB on short break and overseas campaigns (SR, DMOs)

Priority Area 4 - Capitalise on the Region's location

One of the Region's unique assets is its location - the main gateway to England and sitting on the threshold of London one of the world's great tourist cities with a large resident population. We must find ways to exploit this for the benefit of the Region more fully than we have done in the past. Areas we will explore include:

- Promoting London as one of the Region's attractions, easily accessible on a day trip basis from most parts of the Region.
- Promoting the Region as a source of accommodation for London.
- Encouraging day trips out to the Region from residents and visitors staying in London.
- Working with the travel trade and carriers to encourage stop-overs in the Region for visitors arriving at/departing from airports and seaports.
- Looking for ways to encourage transit visitors to break their journey in the Region.

Key actions for TSE

Undertake campaigns with VB, VL and carriers aimed at inbound visitors

Co-ordinate campaign encouraging Londoners /London visitors to visit SE

Explore/research how to capture transit traffic and London visitors

Key actions for our partners

Close collaboration between destinations, ports of entry and carriers. (SR, DMO, O)

Work with TSE and VL to develop joint initiatives (SR, DMO, A)

Work with transport operators to develop days out of London promotions (DMO, A, O)

Promote accommodation on London fringes (O, SR)

Priority Area 5 - Exploit new channels of communication

We must make full use of new media to get our message and product across to an increasingly Internet aware market and to benefit from the reduced costs and improved efficiency that e-commerce and e-marketing offers. This doesn't mean abandoning traditional media entirely – in some markets and some circumstances this is still the most sensible route. But unless we are equipped and encouraged to take advantage of the opportunities that ICT technology brings we will fall behind our competitors.

The priorities are to:

- Ensure the Region is covered by Destination Management systems which can talk to each other and to EnglandNet provide comprehensive and accessible information.
- Facilitate and extend the capacity to book online.
- Wire up the tourism industry and encourage enterprises to use IT and engage in e-commerce.
- Improve the standard and usability of web-sites and portals as a platform for presenting and selling the Region.

Key actions for TSE

Support the adoption of VISIT and other interoperable DMS systems

Raise awareness of the potential of ICT within the industry

Provide expertise and advice to members and partners

Develop TSE website as platform for marketing and sales activity

Develop CRM opportunities

Integrate ICT into all aspects of TSE work

Key actions for our partners

Establish interoperable Destination Management Systems. (DMOs)

Develop and improve tourism web-sites

Facilitate on-line booking and develop use of databases and CRM (DMOs, O)

Raise level of ICT awareness and competence amongst staff and tourism businesses

7. Key Objective II - Providing an unrivalled experience for the visitor

Developing and improving the product on the ground is essential if we are to remain competitive and meet the changing demands of our visitors. This is not just about the bricks and mortar of new facilities but is also about providing and packaging new experiences and equipping people to deliver a quality service. This is crucial to attracting people in the first place, getting people to return and building our reputation. It needs informed and professional staff, profitable businesses which can invest in the future, quality products which prove special experiences, and places which are attractive and well cared-for.

Priority Area 6 - Invest in people and service quality

The key to delivering a quality product and customer satisfaction is good people. We must aspire to developing an able and motivated workforce and building a body of professional and enterprising managers and owners. We face significant challenges in this particular Region. The priorities are:

- Developing a learning culture which recognises the value of training and skills development. To assist this we have to make training affordable, relevant, accessible and useful to both employers and employees.
- Addressing recruitment problems and skills gaps. This will require new recruitment and retention initiatives and working smarter to make more efficient use of labour. We need to adopt better employment practices and improve the image of the industry as an employer and career for young people.
- Improving the quality of welcome and customer care across all aspects of the visitor experience.

Education, training and support is a labyrinth and it is important that we don't add further confusion through ad hoc initiatives. The way forward is to establish a series of Tourism Skills Networks in each of the sub-regions linked to PeopleFirst (the Sector Skills Council) but building on existing initiatives such as the Tourism Better Business Scheme and the Kent Tourism Academy. These will take forward skills audits, identify and fill gaps and provide an interface between tourism enterprises and training providers. We will seek funding for co-ordinators for these projects.

Key actions for TSE

Establish Tourism Skills Networks
Develop and deliver Welcome family courses
Develop skills strategies with local partners
Access funding for training and business support
Develop tailored/integrated business advice services in association with Local Authorities and Business Links
Run training support services
Work to improve perceptions of industry in schools/colleges
Disseminate best practice
Investigate new recruitment initiatives
Build on Partners in Success

Key actions for our partners

Raise awareness of training opportunities
Help establish Skills Networks (SEEDA, LSC, DMO)
Undertake local skills assessments and take appropriate action (SR, DMO, O, LSC)
Engage with tourism operators and develop mechanisms relevant to their needs (SR, DMO)
Disseminate best practice using existing business networks and organisations
Promote staff training and development within own organisations
Signpost and promote training and business advice opportunities (DMO)
Improve links with schools colleges and local community (DMO, SR)

Priority Area 7 - Provide excellent facilities and products

We must increase investment in accommodation, attractions and other facilities if we are to refresh our tourism appeal and keep pace with rising customer expectations and exploit new market opportunities. New facilities can make a big impact but given planning and development constraints much of the improvement will have to come from investment in existing new facilities. We must:

- Support the quality assurance schemes and drive up participation in the accommodation and attractions sector. Public sector promotion and grants should be restricted to quality assured accommodation establishments.
- Reward and highlight quality through award schemes and by celebrating 'winners'. These should be used as business exemplars.
- Signpost business advice and market intelligence to stimulate innovation and development.
- Undertake research to identify gaps and opportunities in the key tourism sectors through further sector studies. Work with planners and developers to achieve new product investment.
- Be careful about encouraging more visitor attractions unless a viable market case can be demonstrated. There is a better case for identifying attraction and activity themes where the Region has strengths and looking for ways to enhance the packaging, visibility and experience of these. Work has already been undertaken on equestrian activity and boating and we will identify other areas with potential.
- Ensure that tourism is linked into other regional plans and funding programmes, is part of the cultural agenda and is acknowledged in the Area Investment Frameworks.

Key actions for TSE

Promote and support national QA scheme
Provide development advice, expertise and contacts
Support research to identify new opportunities and product gaps
Provide intelligence on market/product trends.
Start-up packs and training courses for SMEs
Establish an innovation fund
Identify and help secure 'ground breaking' new developments
Ensure that tourism is reflected in regional programmes

Key actions for our partners

Actively promote national QA scheme (DMO)
Adopt inspected only policy for participation in marketing and grant aid (SR, DMO, O)
Undertake research to identify product gaps (SR, DMO, A)
Promote development opportunities (DMO)
Ensure tourism is taken into account in planning decisions (DMO)

Priority Area 8 - Make places more appealing and inviting

The character and quality of the Region's countryside, coast, towns and villages are its core tourism asset. This is what drives people to visit and is what distinguishes us from other regions. Enhancing the appeal and vitality of these places is vital to success.

Places within the region are very different in terms of their potential and capacity to host tourism and require different approaches. Nevertheless, there are some common themes:

- Managing tourism to ensure that the impact on the surrounding area is positive and that it can be sustained in the long term. Degrading our core assets is bad business and weakens our case for support.
- Improving the quality of the visitor experience as a whole, not just isolated elements. Investment in the public realm is key to this.
- Holding on to what makes a place special and distinctive; once lost its is difficult to retrieve.
- Getting the local tourism industry on board. Without their co-operation it is difficult to make progress.
- Seeing tourism in the wider context and relating it to other objectives such as economic regeneration.
- Working with and being sensitive to the needs of local communities.

In the **countryside**, the main emphasis will be on developing tourism which helps strengthen and diversify the rural economy without overwhelming small communities and sensitive landscapes. SEEDA's rural tourism strategy highlights the opportunities. Priorities include promoting outdoor activities such as walking and cycling, making more of local crafts and produce, especially food, improving access and awareness, and improving the quality and professionalism of small scale accommodation businesses. TSE is already actively working with partners in this field.

Towns and cities are more robust destinations where tourism is generally only one activity amongst many, but again there is wide variation. In the prime heritage destinations such as Oxford and Canterbury the main emphasis must be placed on better visitor and destination management to maintain long term appeal. In other urban areas tourism activity is less developed and the emphasis there will be on identifying market and product opportunities which can be developed. Shopping, entertainment, hotels, arts and culture, and business facilities all offer potential. In some places, such as Portsmouth/Gosport, Rochester/Chatham the visitor economy can be a significant force for urban regeneration.

Seaside resorts on the Kent and South Coast face particular problems of decline due to market changes. Not all will have a future in tourism. Others, however, are making progress by investing in new infrastructure and facilities to change their image and develop new market appeal. TSE is currently working with several resorts (Margate, Sandown Bay, Eastbourne and Camber) on new initiatives. There is a need to tap into SEEDA mainstream project funding.

Key actions for TSE

Help to secure SEEDA funding for tourism projects
Support and stimulate regeneration initiatives in resorts and towns
Develop potential of rural tourism product through work with AONBs, rural ways and Rural Tourism Forum
Support sustainable tourism and green tourism initiatives
Disseminate best practice from with and outside the Region
Develop destination benchmarking and market towns toolkit

Key actions for our partners

Become destination managers and improve the public realm (DMO)
Monitor the quality of the visitor experience through destination benchmarking (DMO)
Draw up visitor management plans for areas of visitor pressure such as historic towns, AONBs and National Parks. (DMO, A)
Use tourism and culture as a component of urban/rur regeneration (SEEDA, DMO)
Enhance local distinctiveness (DMO)

Priority Area 9 - Improve information and access

To help people get the most from their visit we need to make it easy for people. Easy to find out what the Region has to offer and easy to access facilities. We need to:

- Provide reliable, objective information about what is available in places where visitors can access it. Tourist Information Centres will continue to play a key role in this but we review how these can most effectively be used in the light of changing information channels.
- Improve access to tourism for all members of the community. We will aim to make the Region a welcoming place for all irrespective of disabilities or other handicaps.

Transport infrastructure is absolutely key to tourism but tourism interests have relatively little influence over its provision and management. Too often the needs of visitors are simply not taken into account. We need to become more focused about this and identify areas where there are unexploited opportunities or where improvements will make a significant difference to visitor satisfaction. This might relate to information provision at interchanges, timing and penetration of services, or quality of service.

Key actions for TSE

Draw up an information strategy for the Region

Set standards and help support local authority/industry partners in maintaining an effective TIC/MIC network

Advise and raise awareness of DDA requirements

Work with transport operators to raise awareness of visitor needs

Lobby for sustainable transport improvements which will support tourism

Key actions for our partners

Operate and manage TICs. (DMO)

Establish DMS (DMO)

Distribute information to visitors within the Region (DMO, A, O)

Identify areas for critical transport improvements (SR, DMO, LAs, TOs)

Encourage sustainable transport options for visitors (DMO, A)

Implement provisions of DDA (DMO, O, A)

8. Key Objective III - Establishing effective management and organisation

The tourism sector is both highly fragmented and highly interdependent. To a large extent we sink or swim together and if we are to achieve a step change in tourism we have to find ways of working together more effectively. It is only by doing this that we will be able to generate sufficient resources, make a real impact in the marketplace and attract wider stakeholder support. Public and private sector co-operation is more critical in tourism than any other sector.

Priority Area 10 - Develop strong partnerships and networks

We need to develop new structures for organising tourism in the Region to reflect the increased size of the Region and to improve communication and delivery. The proposed model is as follows. It is not intended as a rigid straightjacket and its application will reflect the particular circumstances operating in different parts of the Region. This is about what works best, not just a tidy solution.

- TSE, working closely with SEEDA, will take the strategic lead on tourism, provide expertise, co-ordinate activity across and between regions, and implement programmes on behalf of its stakeholders.
- Six Sub-Regional Partnerships have been established across the Region. These will bring together the private and public sectors, provide the main focus for membership, establish tourism priorities and co-ordinate activity within their area. These are not designed as marketing entities, marketing initiatives will be focussed on areas and brands which make sense to consumers.
- Local authorities and destination management organisations will continue to be responsible for tourism marketing and management in destinations. There may be scope for further pooling of activity and co-operation here. The aim is to establish a smaller number of highly professional and better resourced organisations.
- Active local networks of operators and organisations based on sectors or places will play a vital role in terms of co-ordinating and stimulating activity at the sharp end and providing a route for communication..

Key actions for TSE

Work closely with SEEDA and raise tourism up the regional agenda

Establish and support sub-regional arrangements

Provide support and some funding to sub-regions

Expand active membership of TSE and membership benefits

Develop strong relationships with VB, other RTBs, trade bodies, regional and national agencies

Provide expertise and lead on strategic programmes

Key actions for our partners

Support TSE through membership (DMO, O, A)

Establish effective Sub-Regional partnerships to co-ordinate tourism activity

Feedback to TSE about what is happening on the ground and identifying sub-regional priorities(SR)

Work with partners in local networks tourist associations, sector groups etc (DMO, O,A)

Share experiences, collaborate on activities where partnership adds value

Pool resources and reduce duplication (DMO)

Reach out to other sectors outside tourism

Priority Area 11 - Make better use of resources

There is an enormous amount which needs to be done and limited resources available. We must become more questioning and critical about what we are doing and how best to deliver it and look for ways to secure more resources. We need to apply the following principles.

- Define the respective roles and functions of the various levels of organisation described above and agree who should do what.
- Review what we do in the light of available resources. We need to be more selective and concentrate on things we can effect. We should aim to do less better.
- Review arrangements for tourism marketing and management at the destination level. There is scope for local authorities to join forces and establish destination management/marketing partnerships to combine resources or to embrace more meaningful areas. Sharing and pooling resources should become the norm.
- Review existing marketing activity and print production. There is considerable overlap and wasted of effort here which could liberate resources for more effective activity.
- Actively seek out and bid for new sources of funding for tourism

Key actions for TSE

Challenge and review TSE existing activities and involvement

Seek new sources of funding and grant aid for tourism

Co-ordinate campaigns and eliminate duplication

Encourage rationalisation of DMPs

Agree roles and responsibilities with partners

Withdraw from areas where others are doing an effective job

Key actions for our partners

Work with TSE to agree priorities and activities

Review arrangements for destination marketing and management at the destination level. (DMO, O)

Review activities to identify overlap and areas for collaboration

Priority Area 12 - Become more evidence driven

Better intelligence is crucial to improving our game. We must become more systematic in terms of measuring what we do, basing our actions on sound evidence and providing a more solid justification for tourism. Without this evidence we are taking decisions in the dark and it is difficult to persuade others of the case for tourism. We must:

- Create an 'intelligence led' tourism sector.
- Make better use of the research we have. This means actively disseminating information from the centre, interpreting it and making it more user friendly, and establishing mechanisms to pool and share information.
- Get a better understanding of our customers and their needs to inform marketing and product development. We need a collaborative programme of research to plug gaps in our knowledge and identify market intelligence and trends.
- Establish a data collection and management system which covers the whole Region and which will drive destination management systems and websites.
- Measure economic impact on a systematic basis. This is crucial to making the case for tourism. To date the Cambridge Model has been widely used in the Region but we may need to explore other models and the potential for tourism satellite accounts.
- Evaluating marketing and other initiatives to learn from experience.

Key actions for TSE

Become the recognised centre of excellence for tourism research and intelligence

Provide contract research services

Collate and disseminate market intelligence via web, bulletins and seminars

Monitor tourism trends and business performance

Evaluate marketing activity and act on the results

Act as a conduit to national tourism statistics

Operate the Cambridge model

Key actions for our partners

Support TSE role as centre of research expertise and market intelligence

Identify local research needs and feed into TSE (SR, DMOSs)

Actively participate in TSE surveys (DMOs, O)

Undertake research into visitors and industry sectors (SR, DMOs, A)

Share and pool results of research and feedback market intelligence

Evaluate marketing activity (SR, DMOs)

Priority Area 13 - Create a positive climate for tourism

Tourism cannot flourish unless it has political support and is accepted and welcomed by the wider community. It is in the interests of the tourism industry to make the case for tourism. We need to:

- Develop better relationships with wider stakeholders and increase the profile, acceptance and understanding of tourism. There is no quick fix to this. It is about making the facts available and taking the time and trouble to talk to the media, schools, community groups and councillors about tourism.
- Create the right legislative and regulatory environment for tourism by lobbying decision makers on behalf of the tourism sector and putting the case for tourism. There is also a role in keeping the industry informed about the implications of new legislation.
- Behave responsibly as an industry so that tourism is seen as a positive asset to the Region, not a burden. This means listening to local concerns, embracing the theme of sustainability, being committed to customer care and treating staff fairly.

Key actions for TSE

Lobby government on behalf of the industry and Region

Raise profile of tourism and understanding amongst key decision makers

Communicate positive messages about the Region via media to public, and stakeholders.

Evaluation of economic impacts through Cambridge Model and other appropriate models.

Provide material to support local partners in making a case for tourism

Identify tourism Champions to speak for the industry

Key actions for our partners

Hold seminars and briefings for local councillors (DMOs)

Communicate positive messages and successes locally (SR, DMOs)

Provide TSE with ammunition

Develop open days and tourism weeks (DMOs, O)

Act as tourism champions (DMO, O)

Participate in good employer schemes

Priority Area 14 - Promote innovation and a step change

If we are to realise the potential of tourism in the Region we need to question the accepted wisdom, explore new ways of doing things, take risks, and be more innovative, inventive and resourceful. We are looking to create a step change in the management and performance of tourism in the South East. To help achieve this we will:

- Put in place and support the new organisational structures identified above.
- Critically review what we are doing and change or drop if it isn't working.
- Encourage innovation and new practices through seeking to establish an innovation fund. In return for support enterprises will be expected to help disseminate and publicise their experiences to stimulate others.
- Seek out and celebrate examples of good practice wherever they may be. Study tours, presentations and conferences may be a useful way of raising horizons.

Key actions for TSE

Prepare a new tourism strategy which has support of all stakeholders
Review existing TSE activities
Seek to establish an innovation fund
Identify tourism Champions and Heroes to carve a path for others to follow
Adopt a learning culture - learn from other places and other sectors - measure outcomes and adapt

Key actions for our partners

Review existing work programmes and responsibilities
Be receptive to new ways of doing things
Support the sub-regions
Learn from others and pass on success stories

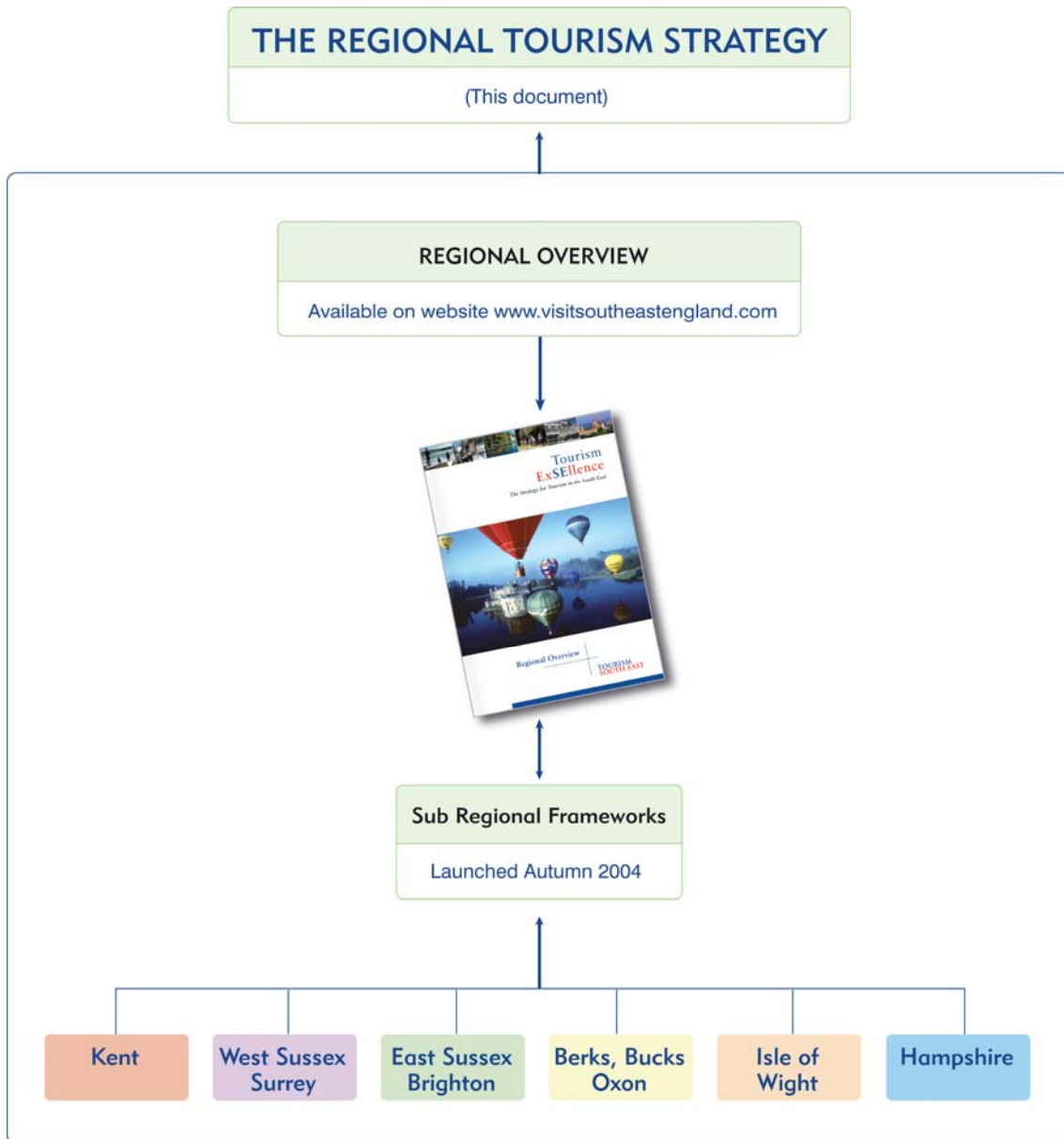
9. Delivery and evaluation

As we stressed in the introduction this is the beginning of a process not the end. The emphasis now will be on translating this into action under each of the 14 priority headings identified in the strategy.

TSE will be responsible for driving the strategy forward, taking an active part in many of the initiatives and evaluating progress. Successful implementation will also require the active support and participation of a wide range of other stakeholders. We propose the following process.

- Publicise the strategy to as wide an audience as possible via a short 'popular' summary with regularly up-dated detail on a strategy web site.
- Complete the process of organisational change both at TSE and in establishing the six sub-regional bodies which will play a key role in providing a focus for membership, co-operation between public and private sectors and co-ordinating action across the Region. As part of this process we should begin to look for opportunities to rationalise and improve the effectiveness of existing DMO/local authority tourism arrangements.
- Develop sub-regional action programmes using the sub-regional tourism frameworks (see Chapter 9) as starting points.
- Complete the process of agreeing an initial brand architecture for the Region to prioritise and focus marketing activity.
- Devise and agree, in conjunction with SEEDA and other partners a set of performance measures to evaluate progress. These are likely to cover areas such as – industry performance, visitor satisfaction, community attitudes, value of tourism, market share, skills take-up and investment. We will establish a base line set of statistics in order to judge progress.
- Produce an evaluation and progress report on an annual basis which charts activity and achievements under each of the 14 priority areas and makes recommendations for adjustment in overall direction and priorities. The evaluation group should involve cross-section of stakeholders.

10. Sub regional frameworks



11. Sources of further information

Some useful websites

Arts Council England, South East	www.artscouncil.org.uk
British Hospitality Association	www.bha-online.org.uk
British Resorts Association	www.britishresorts.co.uk
Countryside Agency	www.countryside.gov.uk
DCMS	www.culture.gov.uk
English Heritage	www.english-heritage.org.uk
Government Office South East	www.go-se.gov.uk
Holiday Care Service	www.holidaycare.org.uk
Local Government Association	www.lga.gov.uk
National Trust	www.nationaltrust.org.uk
Screen South	www.screensouth.org
SEEC	www.culturesoutheast.org.uk
SEEDA	www.seeda.co.uk
SEERA	www.southeast-ra.gov.uk
SEMLAC	www.semlac.org.uk
Sport England	www.sportengland.org
Star UK (tourism statistics)	www.staruk.org.uk
Tourism Management Institute	www.tmi.org.uk
VisitBritain	www.visitbritain.com
VisitEngland	www.visitengland.com
Visit London	www.visitlondon.com

Glossary

TSE	-	Tourism South East
SEEDA	-	South East England Development Agency
SEERA	-	South East England Regional Assembly
SEEC	-	South East England Cultural Consortium
DCMS	-	Department Culture Media and Sport
SEMLAC	-	South East Museum Library and Archive Council
VB	-	VisitBritain
VL	-	Visit London
EFL	-	English as a foreign language
VFR	-	Visiting friends and relative

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