

Tourism Tourism Tourism Tourism

Policy from practice

Tourism is one of the largest industries in the UK, worth approximately £74 billion in 2003 and employing some 2.2 million people, 8% of the working population.

The National Trust is a significant player in this industry. With a turnover of more than £300 million a year, we currently protect and manage on behalf of the nation over 600,000 acres of countryside and over 700 miles of coastline across England, Wales and Northern Ireland. This work underpins the essential environmental resources upon which tourism depends.

In addition we care for a significant proportion of the country's designated sites and buildings of natural and cultural significance, opening 300 houses and gardens to the public.

We welcome around 13 million visitors to our pay-for-entry properties annually and there are an estimated 50 million visits to our coast and countryside properties each year.

We also undertake a vast range of tourism-related activity to support and promote these visits. These include:

- operating Europe's largest network of owner-managed holiday cottages – with over 320 cottages and an annual turnover in excess of £5

million;

- offering over 400 working holidays a year, enabling volunteers to work at our properties;
- over 80 of our farm tenants offering bed and breakfast accommodation, there are 50 camping and caravanning sites and 21 YHA hostels on our land;
- running 135 restaurants, cafes and tea rooms with a collective turnover of £17.5 million - the nation's largest network;
- promoting and using regional and local produce and crafts in our shops and restaurants – including 25 local vineyards, 32 local cheese makers and 20 local ice cream makers;
- investing significantly in domestic advertising and promotions – including events, press and media activity and as a partner with VisitBritain.

We also campaign and support advocacy of the importance of sustainable tourism across Government and with opinion formers and decision makers regionally and nationally.

We are members of a number of Destination Management Partnerships, supporters of

VisitBritain, contribute to the work of the Tourism Alliance, participate in the DCMS Tourism Reform Implementation Group (TRIG) and are members of the Association of Leading Visitor Attractions (ALVA).



As both a charitable conservation body and a business, we have a key interest in promoting a sustainable tourism sector. For the Trust this means:

- promoting regional and local characteristics;
- supporting local economies through tourism spend, and providing employment particularly in rural areas;
- improving public transport and reducing tourist dependence on cars;
- working in partnership with local communities and businesses to improve the tourism offer, and its sustainability; and
- increasing awareness of the impacts of tourism with visitors and providers alike.

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Learning from experience

From our practical experience, we know that tourism contributes much needed income to local economies and increasingly demonstrates the important link between a **high quality environment** and the future economic sustainability of rural and urban communities.

This link is clearly illustrated in the findings of our *Valuing our Environment* studies, which found that 40% of the jobs created through tourism rely directly on a high quality environment and that this increases to 60% to 70% in rural areas.

As well as being a hugely important economic driver, we believe tourism has much to offer wider social and environmental objectives. This includes providing opportunities for education and lifelong learning (by visiting or volunteering at a property, for example), underpinning the viability of a large range of often small rural businesses and providing attractive places where businesses and communities can thrive.

People visit the Trust for a variety of reasons; research has shown that over **40 different types of leisure activities** take place on our properties. In addition, it has been found that over 90% of visitors engaged in informal learning while visiting a property. People are interested in finding out about the history of the place itself, the people who lived there and the 'everyday life' at that period in history.

Our working holidays give people the opportunity to gain new skills, meet new people and take a break, contributing the equivalent of 2,350 weeks of conservation work a year.

While the impacts of the 2001 Foot and Mouth outbreak illustrated how important tourism is to rural economies, this experience and the lessons learned have not been fully appreciated.

As a result, the Trust believes the wider role of tourism is still not properly recognised, in either current debates about tourism or the public policy framework which supports it.

Our experience across the English regions, Northern Ireland and Wales suggests that whilst many tourism strategies refer to the importance of natural, cultural and historic assets, the need protect these assets is not well recognised as a priority, nor is it considered fully in other policy areas, such as transport and land use planning policy.

Through its experience the Trust is able to recognise the benefits that a broader interpretation of the role of tourism can bring, for example in relation to sustainable urban and rural regeneration. The contribution of tourism to **local identity and distinctiveness**, and the opportunities it offers for personal reflection and public benefit are all too often overlooked.

Whilst there are 'market' issues within the sector that need to be addressed, for example in terms of skills, quality and data, these need to be considered in the context of the broader benefits that tourism can bring.

National Trust cottages

National Trust cottages demonstrate the benefits of holidaying at home by generating income not only for the Trust's conservation work, but also for local service providers such as restaurants and shops.

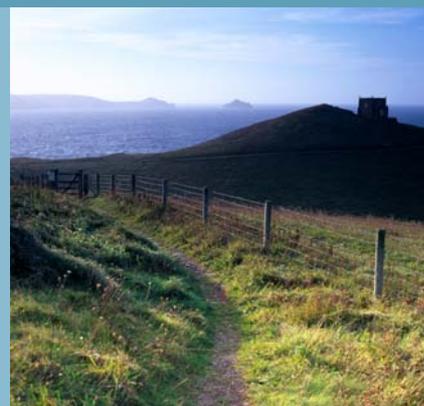
The Trust owns and manages all of its cottages and they generate a surplus of over £2 million which is ploughed back into the Trust's work.

The cottages are very popular, with an annual occupancy rate of 78%, far above the average figure for self-catering accommodation in the UK. In addition some of our cottages are booked up two years in advance, with people returning year

on year to their favourite cottage. The reasons for the high demand for our cottages are clear in the comments made by our guests - they are attracted not just by the facilities and comfort on offer, but by character and location.

Many cottages are well over 100 years old, with original and unique features, and the landscapes and beauty of the places in which they are situated are a key part of their attraction.

It is important that accommodation grading systems take account of the character and setting of properties, as well as the facilities; the Trust's own "Acorn" grading system strives



A National Trust holiday cottage at Doyden Castle, Cornwall situated on a headland with views over Lundy Bay

to achieve this by providing guidance on the attributes of cottages and their locations.

The Lizard and Kynance Cove

Although the South West earned over £4 billion from tourism in 2003, Cornwall is still England's poorest county.

With £2.5 million of investment over 10 years, the Trust is delivering long-term, sustained benefits to the area around the Lizard Peninsula.

Through a mixture of economic, social and environmental investment, we have helped to transform the Lizard Peninsula, a coastline with dramatic cliff walks, masses of rare wild flowers and fascinating geological features.

With the help of partners we have removed intrusive buildings and cables, converted neglected hotel buildings into the country's most southerly youth

hostel, improved public access, opened the Poldhu Marconi Centre at the birthplace of modern communications, invested in a solar powered café at Kynance Cove and changed farming practices to restore habitats.

Projects such as these have the potential to provide a wide social and economic benefit, bringing more people and therefore money into an area and community, through spending on local accommodation, services and attractions.

Increasing access to such beautiful areas both inspires and educates local people and visitors alike, such as the use of renewable energy solutions in



The Lizard lighthouse seen from Bumble Rock and Lion's Den.

the café at Kynance Cove and the Marconi centre.

Future challenges

There are a number of challenges that face the tourism sector as a whole. The ways in which these are addressed are vital for the sustainability and stability of the tourism market and for providers to be able to continue to offer a good service to visitors.

The tourism deficit

The tourism deficit has grown dramatically in the last 10 years, with UK holiday-makers now spending £17 billion more abroad than visitors to the UK are spending here. This growth has been fuelled by the rise in

UK residents taking foreign holidays, especially short breaks, and is denying the UK much-needed tourism spend. The current emphasis on tackling this imbalance has been on encouraging more overseas visitors to the UK with, for example, VisitBritain spending £35.5 million on international marketing compared to £10.4 million on marketing England to the domestic tourist in 2002/3.

However, in terms of tourism revenue, the domestic market far out-strips the international market with UK residents contributing over £60 billion a year compared to just under £12 billion from international visitors. As the

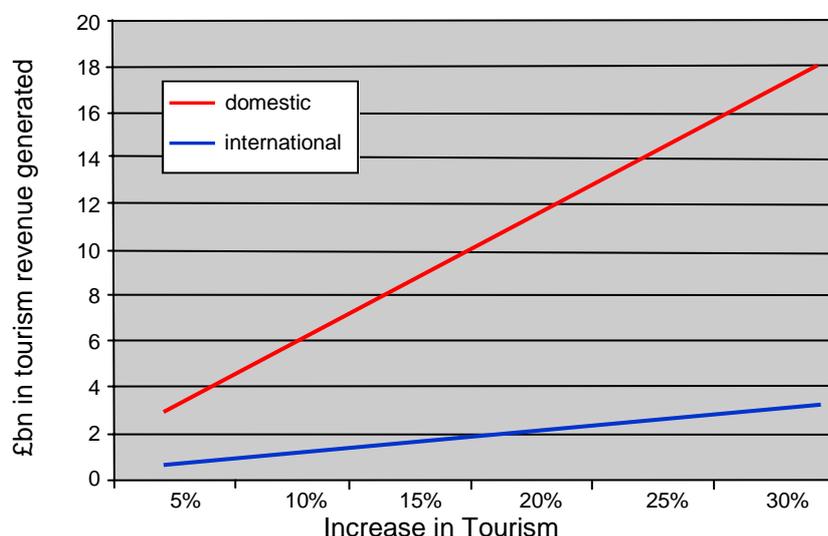
graph below shows, a 10% rise in domestic tourism would generate £6 billion in additional revenue, whilst the same rise in international would result in just £1.2 billion.

Moreover, the benefits and burdens of domestic tourism are also more widely spread over the UK, given the focus of international tourists on relatively few locations. As a market domestic tourism also has the scope and potential to expand more significantly and sustainably.

Providing better opportunities to holiday at home, meeting the growing desire for short breaks and extending the tourist season would bring welcome economic and other benefits to rural (and urban) communities. In addition it would reduce the risks involved with volatility in international tourism and reduce the pressure for further significant expansion of an environmentally damaging aviation sector.

The 'real thing'

In an increasingly discerning and competitive market, **quality is fundamental to success**. As illustrated by the Trust's cottages, it is often the character and setting of accommodation rather than the range



of facilities that matters most when people are choosing where to stay on holiday. However quality is not just about the physical attributes of the accommodation - it is about the totality of the experience.

A quality experience depends upon access to beautiful coast and countryside, well-maintained footpaths, local foods and crafts, historic towns and villages, a lively cultural life or even just a sense of tranquillity, together with good customer service.

The value of the natural and historic environment, local and regional character and access to the "real thing" needs to be recognised by the tourism sector as a vital resource that needs to be well managed and cared for.

Traffic

In 2003 73% of tourists used cars as their means of transport. This culture of dependence on cars and private transport is one that the Trust is trying to change in relation to our own properties, by developing a toolkit to help properties find green transport solutions for their visitors.

For example it is now possible to holiday for a week in Falmouth using the National Trust supported network of local ferries and other public transport for a diverse range of day trips. In effect the journey has become part of the holiday and adds value to the visitor experience.

A way forward

Tourism is the world's fastest growing industry. In the UK the sector needs to look at ways of growing tourism in a manner that is sustainable in the long term - protecting assets based upon environmental quality and maximising the social, economic and environmental benefits to local communities.

With this overall aim in mind, tourism policies, plans and strategies, whether local, regional or national, should:

- Support, protect and enhance the environmental assets (natural and cultural) on which tourism depends;
- Promote and support local characteristics and distinctiveness, ensuring visitors have access to the "real thing" - a quality, authentic and inspiring experience;
- Support local economies and work with local communities;
- Improve education, training and skills within the sector;
- Promote opportunities for lifelong learning and access for all;
- Promote the improvement of public transport and support car free tourism opportunities, including requirements for Visitor Travel Plans for new
- Recognise the wider importance and significance of tourism and the need to integrate tourism into wider planning and policy making;
- Have sustainable tourism - integrating social, economic and environmental aims - as the primary objective;
- Be accompanied by a Government target to reduce the current tourism deficit and an assessment of the different ways that this can be achieved;
- Place greater emphasis on the domestic market, especially in marketing and promotion; and
- Establish mechanisms to give advice and support to small-scale tourism providers in order to help them adjust to changes in the local market and to central policy changes.



tourism developments and their introduction for existing sites;

Coming soon -

Museums

Energy micro-generation

Photographs

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