

MALCOM BELL

VISIT CORNWALL

Visit
Cornwall

Malcolm
Bell



Projections for Growth



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Staying Visitor Trips in 2030

**An additional 510,000
trips per year (10 %)**

**An additional 1,000,000
nights per year (5 %)**

Trips (mn)	Year on year change	Nights (mn)	Yo
4.78		23.452	
4.69	-2.0%	23.087	
4.74	1.0%	23.195	
4.78	1.0%	23.304	
4.83	1.0%	23.413	
4.88	1.0%	23.523	
4.93	1.0%	23.634	
4.98	1.0%	23.745	
5.03	1.0%	23.856	
5.08	1.0%	23.969	
5.13	1.0%	24.081	
5.18	1.0%	24.195	
5.23	1.0%	24.309	
5.29	1.0%	24.424	
		4%	

Day Visitors

An additional
2,000,000 day visits
 per year by 2030
 (13.6 %)

	Trips (mn)	Year on year change	Spend (mn)
	14.66		£518.18
	14.55	-0.7%	£508.13
	14.72	1.1%	£524.00
	14.88	1.1%	£540.37
	15.05	1.1%	£557.25
	15.22	1.1%	£574.65
	15.39	1.1%	£592.60
	15.56	1.1%	£611.11
	15.74	1.1%	£630.19
	15.91	1.1%	£649.87
	16.09	1.1%	£670.17
	16.27	1.1%	£691.10
	16.46	1.1%	£712.69
	16.64	1.1%	£734.95

Additional Visitor spend

£521,000,000

extra per year in 2030


(26%)

Direct visitor spend (mn)	Year on year change	Total visitor related spend (mn)	Year on year change
£1,918.87		£1,951.27	
£1,896.17	-1.2%	£1,928.18	-1.2%
£1,935.32	2.1%	£1,968.00	2.1%
£1,975.39	2.1%	£2,008.74	2.1%
£2,016.39	2.1%	£2,050.44	2.1%
£2,058.35	2.1%	£2,093.10	2.1%
£2,101.29	2.1%	£2,136.77	2.1%
£2,145.24	2.1%	£2,181.46	2.1%
£2,190.22	2.1%	£2,227.20	2.1%
£2,236.26	2.1%	£2,274.01	2.1%
£2,283.39	2.1%	£2,321.94	2.1%
£2,331.63	2.1%	£2,371.00	2.1%
	2.1%	£2,421.23	2.1%
	2.1%	£2,472.65	2.1%
		27%	

Employment Growth

An additional 8,000 new jobs

62,190 by 2030
(14.8%)



FTE employment	Year on year change	Estimated actual employment	Y
40,467		54,185	
40,774	0.8%	54,647	
41,204	1.1%	55,223	
41,641	1.1%	55,808	
42,084	1.1%	56,403	
42,535	1.1%	57,006	
42,992	1.1%	57,619	
43,457	1.1%	58,242	
43,928	1.1%	58,874	
44,408	1.1%	59,517	
44,895	1.1%	60,170	
45,389	1.1%	60,833	
45,892	1.1%	61,506	
46,403	1.1%	62,190	
15%		15%	

Growth Projections and Implications

- Summer Capacity Issues
- More about “experiences”
- Majority of Growth must be out of peak - AirBnB Growth !!!!
- Transport Infrastructure
- Product Development needed
 - Spring events
 - New services
- Aging customer base and impact on accommodation, activities, opportunities and motivations
- Need to ensure **Wise Growth** that works for Cornwall, Residents and Businesses



Wise Growth

The Principles



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Wise Tourism Development Principles – “VERB”

V Our **Visitors**

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Wise Tourism Development Principles – “VERB”

V

Our **Visitors** are delighted with the experiences and services they receive and who respect what local communities treasure and want them protected and improved.

Wise Tourism Development Principles – “VERB”

V Value over **V Volume** - so that Cornwall maintains and improves its “premium price” position and top UK holiday region and growing international destination.

Value =

- Filling Empty beds
- Getting and maintaining a Premium Prices across the range
- High levels of customer satisfaction
- High levels of repeat and returning customers
- New customers from UK and Overseas markets

Volume =

- Growth in non peak periods

Wise Tourism Development Principles – “VERB”

E Our **Environments** Natural, Ecology, Cultural, Built, Public Realm are protected and improved to enhance the quality of life of Cornish residents and maintain and improve the attractiveness of Cornwall to selected tourist markets

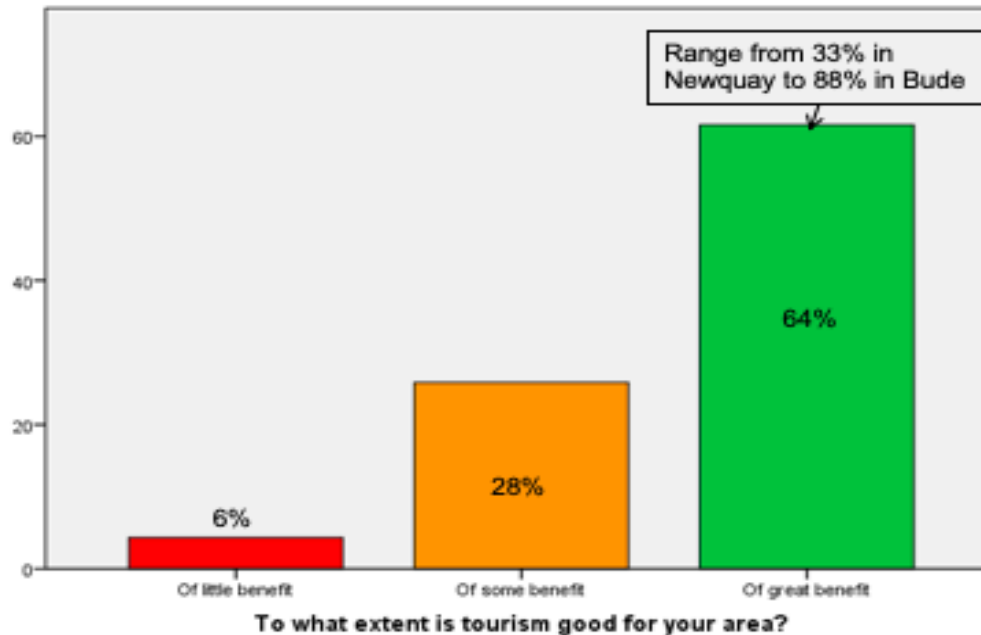
Wise Tourism Development Principles – “VERB”

R **Residents** that accept (and where many welcome visitors) and where there is an acceptable level of impact on their day to day lives. Residents benefit from the facilities and services supported through tourism.

Wise Tourism Development Principles – “VERB”

Q9. To what extent do you think tourism is good for your area? Would you say it is...

Of the majority who feel that tourism is good for the area, nearly 2/3rds believe it is of great benefit to the area.



Wise Tourism Development Principles – “VERB”

B **Businesses** that are competitive, profitable and able investment in the continuous improvement in services, new facilities and equally important business productivity, skills and staff/management development.

Wise Tourism Development Principles – “VERB”

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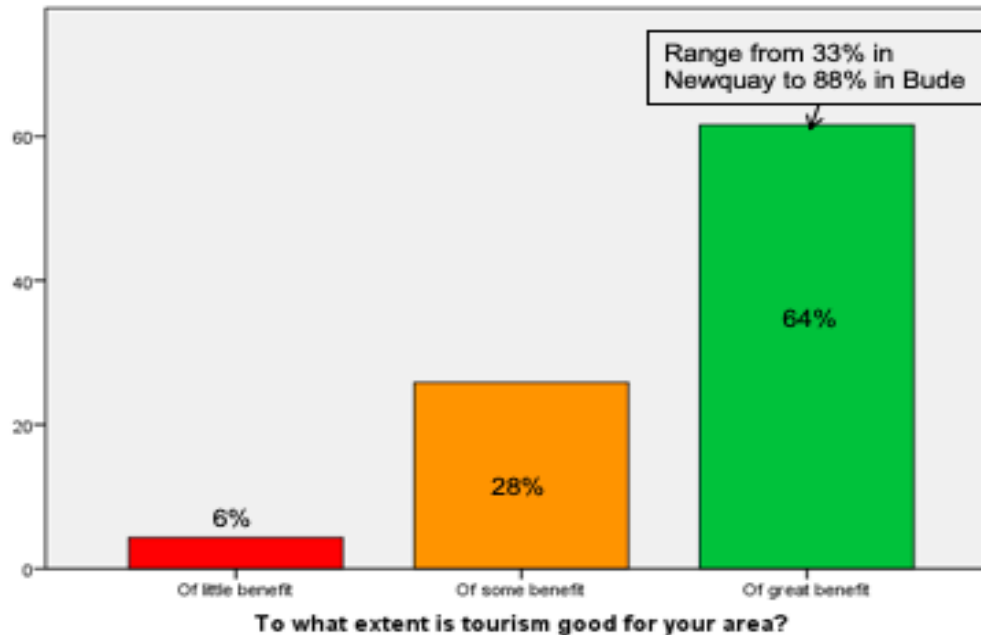
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Tourism in Cornwall will be **Growing**



Be need to ensure we get the *tourism we want*

Or we will get the *tourism we get*

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Trends and the Future



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Let us Look into the future

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The Death of Deference to Age



**Does age or
conventions matter
anymore ?**

Life and Ageing gets in the way !



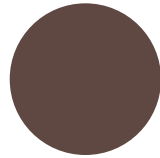
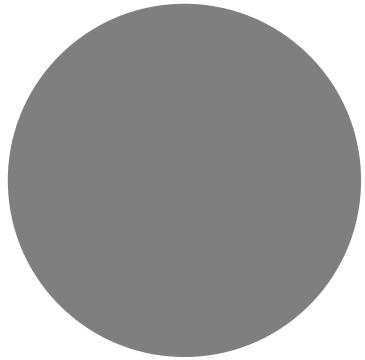
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Does age or conventions matter anymore ?

Life and Ageing gets in the way !

- Relationships/partners
- Employment - Careers – well being/mindfulness
- Children
- Dogs !!
- Health issues – fit days
- Accessibility – not just wheel chairs
- Ageing generally – the bones





What will life be like
in 2025

Cornwall



Aging Segments

Segment	2020	2025	2030
Older	75 – 90	80 - 95	85 - 100
Baby Boomers	60 - 75	65 -80	70 - 85
Gen x	40 - 60	45 - 65	50 - 70
Millennials	20 - 40	25- 45	30 - 50
Generation Z	15 -25	20 -30	25 - 35
Snowflakes	5 - 15	10 - 20	15 - 25
Not Known	0-5	5 - 10	10 - 15

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2025

- Some Cornwall Populations Growth
- Growing market for Real authentic experiences
- Far more about **what will we do** and then where do we stay
- Possible **Over tourism Issues** – AirBnB +
- **Booking Patterns Changing** short break self catering etc
- **Technology Changes** and 5/6 G or for some it being put back in its box JOMO — easy to book experiences etc
- **Eating and Food** – veganism, vegetarianism, allergies, intolerances – everyone must have a great meal not second best
- **Ageing Population**
- Further **Ethnicity Changes** especially family market 2nd and 3rd generation
- Road, rail and air **route improvements**





Next
BIG THING

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Looking at past interests and
adding current trends



**LITTLE
THINGS
MEAN A
LOT**

**No
lots of
small
developments**




Current and Emerging Consumer Trends



AGE AGNOSTIC

Older people want to feel, behave
and be treated as younger

The boundaries of old age are shifting as people live longer and take better care of their health, appearance and wellbeing. People do not want to feel old. It is all about the emotional treatment and handling of ageing



**The Senior
Market in 2025**
80- 95

AGE AGNOSTIC

Older people want to feel, behave
and be treated as younger

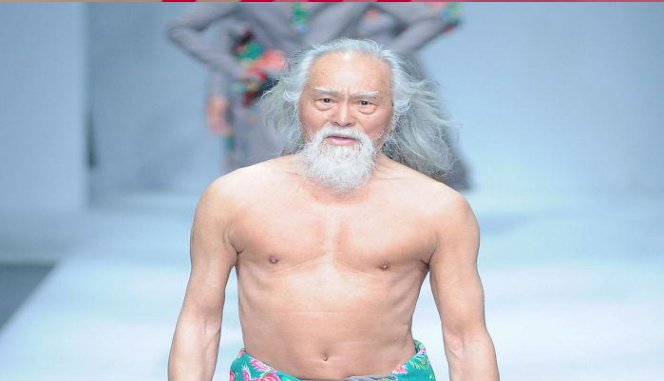




**The Baby
Boomers 2025**
65-80

AGE AGNOSTIC

Older people want to feel, behave
and be treated as younger

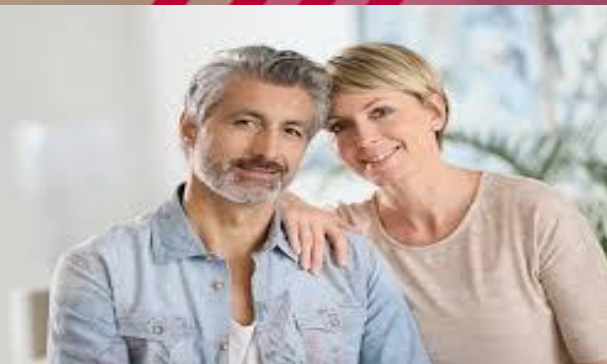




**The Gen X in
2025
45-65**

AGE AGNOSTIC

Older people want to feel, behave
and be treated as younger





**Millennials in
2025
25-45**

AGE AGNOSTIC

Older people want to feel, behave
and be treated as younger





AGE AGNOSTIC

Older people want to feel, behave
and be treated as younger

**Gen Y in
2025**
20 -30

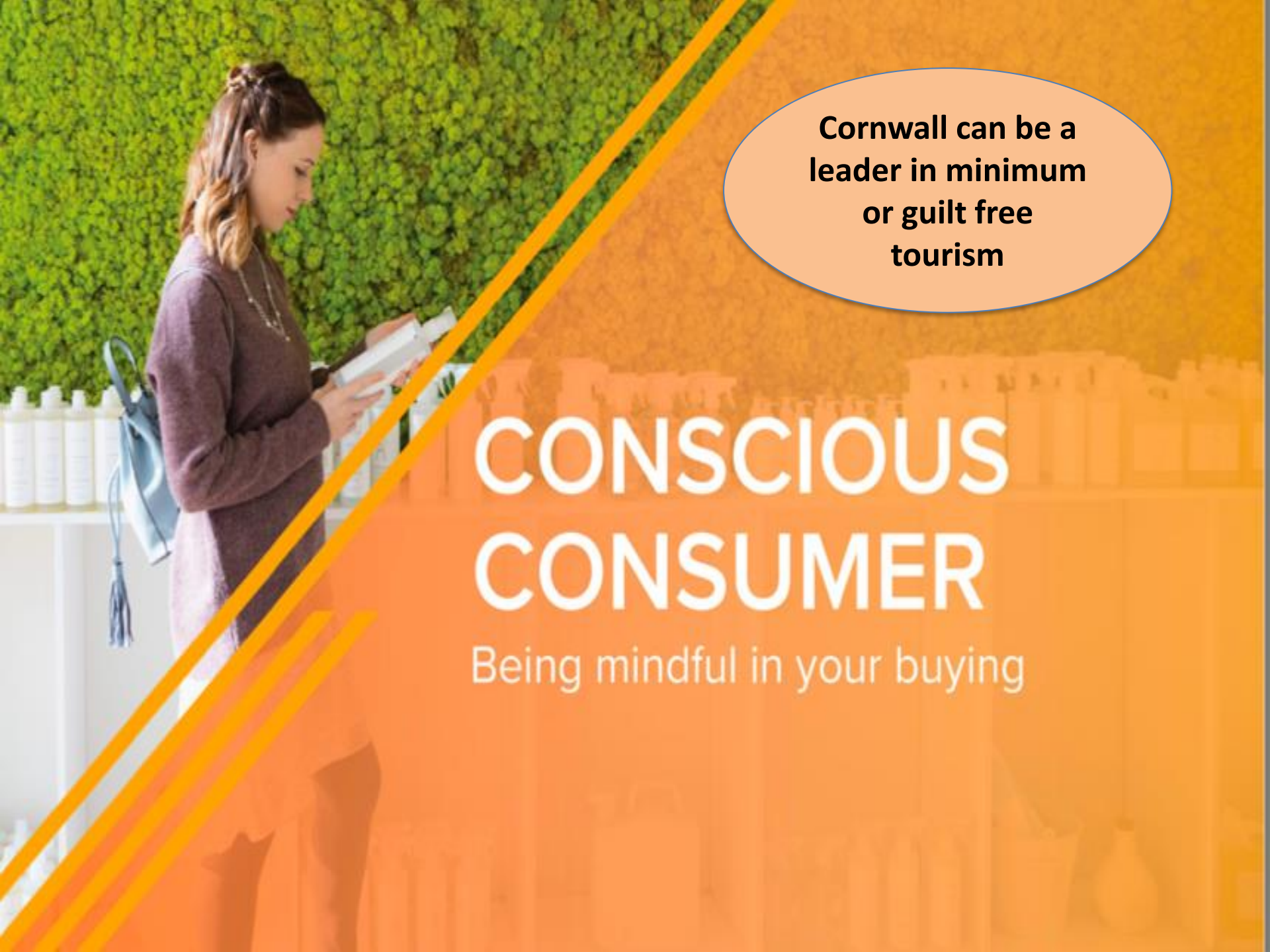
**Snowflakes
in 2025**
10-20



**Cornwall
very well
placed**

BACK TO BASICS FOR STATUS

Less is more



**Cornwall can be a
leader in minimum
or guilt free
tourism**

CONSCIOUS CONSUMER

Being mindful in your buying



**More Marketing and
Communications
Challenges ahead !**

DIGITALLY TOGETHER

Proximity is no longer a boundary

**The Blue and Green
Gyms**

**Come to Cornwall and
find yourself !**

FINDING MY JOMO

The joy of missing out



Health, Wellbeing
Mindfulness and
much more across
all ages

I CAN LOOK AFTER MYSELF

Consumers cut out the middleperson
and turn to alternative self-care
methods

A woman with short black hair, wearing a light grey button-down shirt, is holding a young child in a yellow shirt. They are standing outdoors, possibly near a car. The background is a collage of plastic waste, including a red and black car interior, a green bag, and various plastic containers. A dark brown oval with a thin blue border is positioned in the upper right, containing the text 'Cornwall Leading again'. The overall color scheme is warm, with orange and yellow tones.

**Cornwall
Leading again**

**I WANT A PLASTIC
FREE WORLD**

Consumers taking direct action to
eliminate plastic waste

The push for a plastic-free society has gained momentum, consumer desire for a plastic-free world will grow. Plastics, such as single-use packaging for food and beverages and micro-plastics found in beauty, personal and home care, as well as plastics produced by the fast fashion industry, are coming under increased scrutiny



The Amazon Prime Effect

**I WANT IT
NOW!**

Efficiency-drive lifestyles and
frictionless experiences

A photograph of a man with a grey beard and short grey hair, wearing a light blue t-shirt, is shown in profile from the waist up. He is standing in a kitchen, looking down at a black frying pan on a stovetop. The kitchen has light-colored wooden cabinets. The image is overlaid with a semi-transparent orange filter and several diagonal yellow lines. In the top right corner, there is an orange oval containing the text "Opportunities and Challenges". In the center, the words "LONER LIVING" are written in large white capital letters, with the subtitle "Loving the single life" below it in a smaller white font.

**Opportunities
and
Challenges**

LONER LIVING

Loving the single life

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