Future Trends in Cornwall & Isles of Scilly Tourism

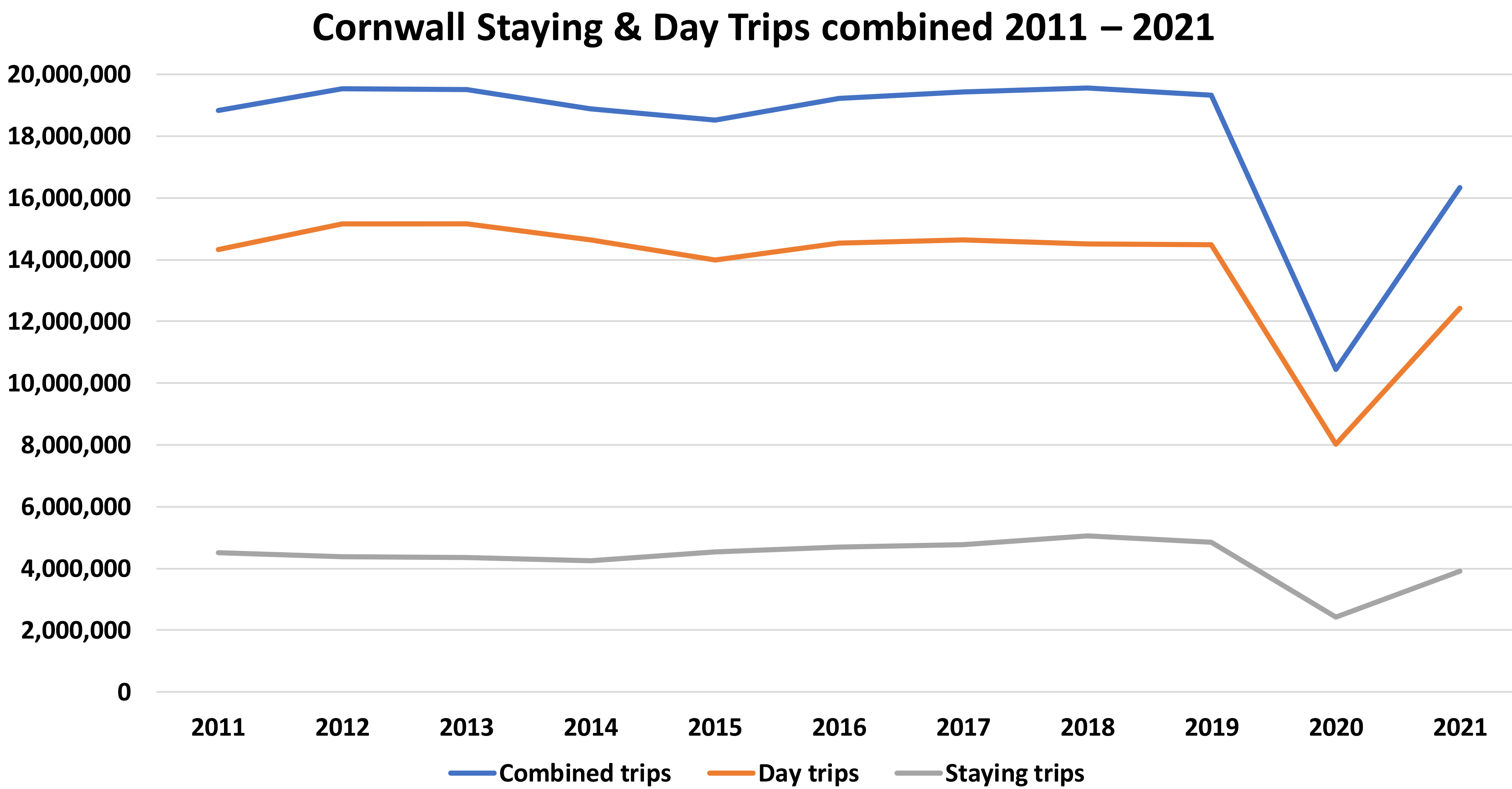
Produced by

The South West Research Company

On behalf of

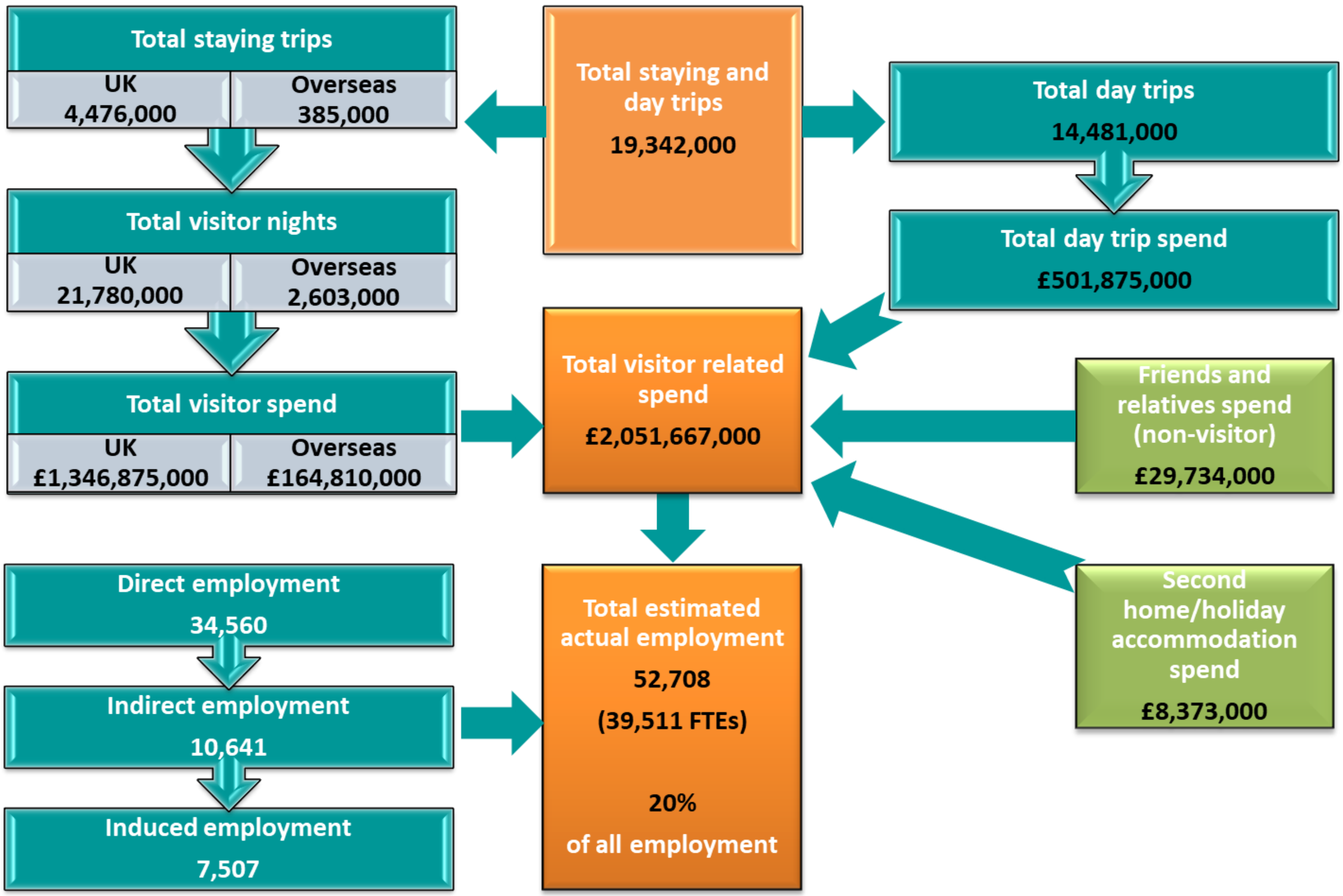
Visit Cornwall

So how has Cornwall faired?
Prior to the global pandemic in 2019, combined staying and day trips to Cornwall have remained relatively stable over the last decade at around 19 million.



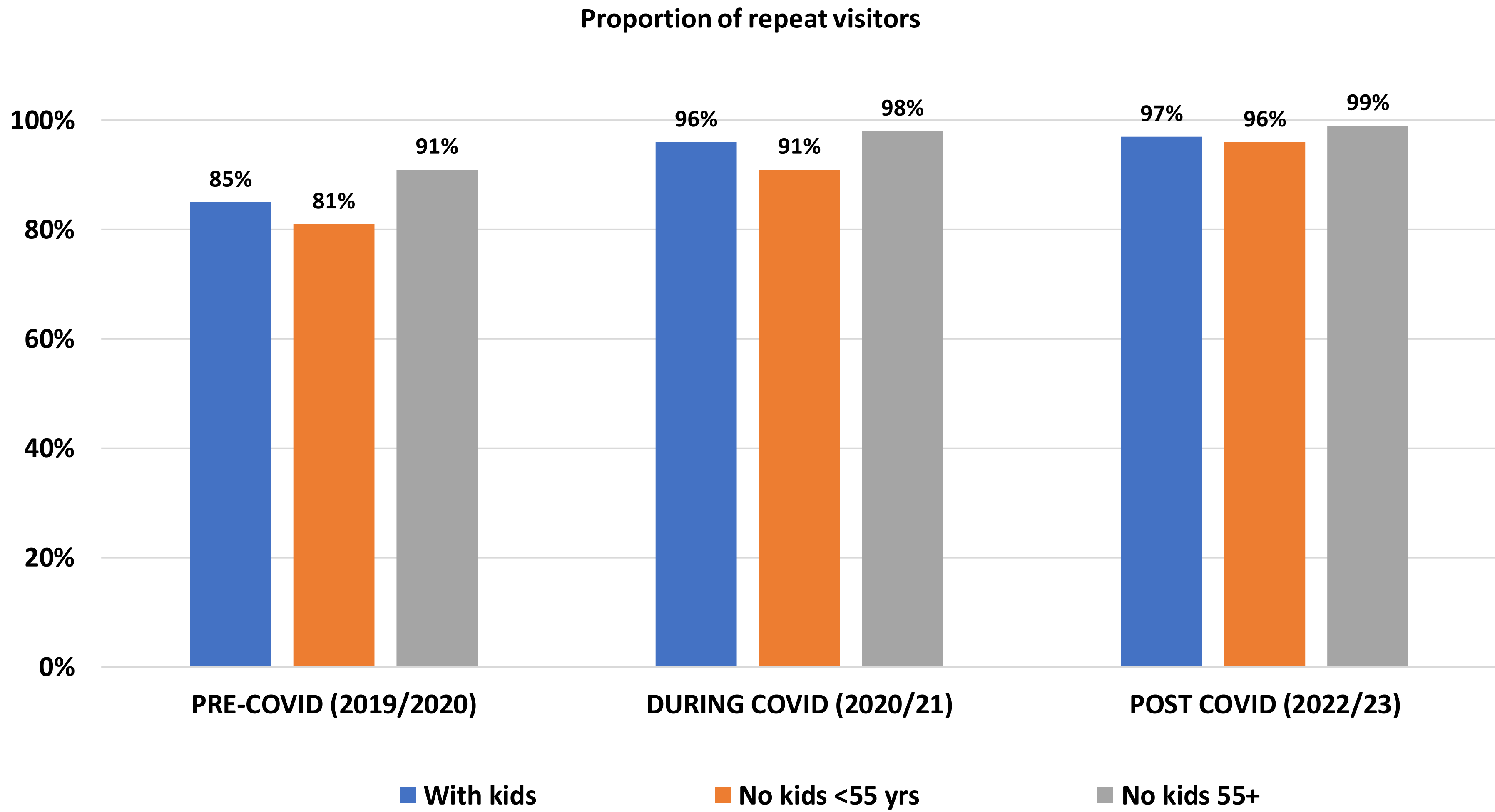
Data derived from The Economic Impact of Cornwall's Visitor Economy 2021 report.

Pre-pandemic (2019) the county attracted 19.3 million day and staying trips, equating to £2.1 billion visitor related spend supporting approximately 53,000 actual jobs.



Data derived from The Economic Impact of Cornwall's Visitor Economy 2019 report.

Regardless of Covid-19, the county has continued to benefit from a very high proportion of repeat visitors which has been further strengthened by visits made during and post the pandemic.



Data derived from previous Cornwall Visitor Surveys undertaken between 2019-early 2023.

Does Cornwall still hold appeal post pandemic?

The South West Research Company

Has Cornwall lost its Shine?

In summary to the key points raised for this question:

- There is no doubt from all of the research that Cornwall ***remains a very special and unique holiday destination for domestic holidays and is indeed seen as a premier brand and destination***.
- However, ***the cost to holiday in the county is an issue that needs to be addressed both in real terms in some areas and in changing the perceptions that current and potential visitors currently have***.
- ***It's also highly likely that even those that holiday in Cornwall and consider it to be affordable will still be cash conscious in the current economic climate and thinking carefully about what they spend and what they do.***.
- ***Overcrowding being an issue during the summer months*** and also certain specific areas. However, this perhaps ***offers an opportunity to promote quieter holidays in the county away from the peak season to attract those that wish to avoid the crowds*** of July and August.

Was the county over-holidayed during Covid?

In summary to the key points raised for this question:

- ***All of the research suggests that no damage was caused by over holidaying during Covid and in fact the popularity and appeal of Cornwall is likely to have increased as a result. The more people visit the more they want to visit***,
- ***Increases in expectations being exceeded, visitor recommendation scores and the likelihood to re-visit during and post-Covid are all good news for Cornwall.***.
- ***Overall, the key points covered for this chapter are largely positive for Cornwall looking ahead although also present some challenges for both the industry and for marketing and communications with visitors and potential visitors.***
- ***In particular, actual costs, perceptions of costs and the image of areas of Cornwall being for the well off and second home owners only all have the potential to impact visitor numbers.***

What's been happening and is likely to happen in Cornwall in 2023 and 2024

Where is Cornwall now in terms of a visitor destination for this year?

In relation to holidays in Cornwall this year the focus groups suggest:

- For most, ***Cornwall remains a consideration***.
- However, holidaying patterns ***have yet to fully settle post-pandemic and the cost-of-living squeeze is also having an impact on how much families are prepared to commit to holidays and trips away in the months ahead***.
- In general, there was a strong sense in many groups that currently everything is in a state of flux or more accurately, patterns that have been constant have been undermined. ***Consequently, holidaying patterns have not yet formed again: what people used to do is not necessarily what they're doing now or will do in the future.***
- ***A key influence in this is cost***: Cornwall is seen as expensive, especially in the peak summer period and, much as families love to visit Cornwall, the price of family accommodation in July/August is seen as prohibitive: it's more likely for many that they'll visit during the Whit half-term or later in the year (e.g., October half-term)…..
- … ***but household finances are tight, so cheaper alternatives are being considered***.

Data derived from Mindset Research Qualitative Research Findings summary report May 2023

What’s happening during visits to Cornwall this year?

The cost-of-living crisis is likely to impact the majority of visits to the county this year during the actual visit as people look to cut costs and budget.

- The food and drink sector is likely to see the largest levels of cutbacks.
    - ***34% will spend less on eating and drinking out***
    - ***26% will spend less on eating and drinking out by eating out less in at restaurants/pubs/cafes etc.***.
- The attractions/leisure/activities will also be impacted.
    - ***29% will look for more ‘free things’ to do.***
    - ***13% will visit fewer visitor attractions.***
    - ***8% will do fewer activities***
- **Retail impact – 29% will cut back on buying gifts/shopping**.
- ***Overall, 18% of 2023/24 visitors will be on a budget for the whole of their visit with those with children and under 55 years old without children likely to be feeling the strain the most.***

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The view that Cornwall has become an expensive option is almost universal from the Focus Groups backed up the survey data.

- However, on a positive note, Cornwall at its best is all about free stuff anyway: families visit Cornwall in order to spend long, sunny days on the beach.

Data derived from Mindset Research Qualitative Research Findings summary report May 2023

What's been happening and is likely to happen in Cornwall

- *Booking patterns haven't yet settled down and returned to what would be considered as normal pre-Covid*.
- ***Seasonality data currently suggests that there will be increased trip volumes outside of the peak season in September and October***.
- ***It is likely that there will be more later bookings than usual.***
- ***Potentially up to approximately a third of visitors could be switching their accommodation type, although around half of those still haven't definitely decided as yet.***
- Overall, and amongst all segments for those changing accommodation types a noticeable shift ***away from serviced accommodation, a smaller decrease in self catering (all segments showing decreases excepts seniors – no kids 55+) and a shift towards camping/own caravan, statics caravan/holiday park and other accommodation types, all of which will see increases.***
- Potentially up to approximately a quarter of visitors not changing their type of accommodation ***will be looking for cheaper alternatives within their usual accommodation type.***

Is there potential for out of season growth in Cornwall?

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The research suggests yes, without doubt.

- Many respondents have already had great experiences in Cornwall out of season – but it is important that ***potential visitors are reassured that Cornwall and all it has to offer will be properly open (i.e. they'll be able to find restaurants and cafes; National Trust houses won't be mothballed for the winter; festivals and events will continue to take place).***

Survey data confirms good levels of interest:

- In the latest Cornwall online survey ***73% of respondents agreed with the statement "Visiting Cornwall and the Isles of Scilly outside of the summer season is of interest to me".***

- ***56% of the nationally representative sample*** surveyed through the BDRC Monthly tracker agreed with the same statement.

- Agreement was ***highest amongst visitors in the last five years (68%), social group AB (60%) and South East respondents (65%).***

Data derived from Mindset Research Qualitative Research Findings summary report May 2023/ BDRC/ Cornwall Online visitor Survey 2023

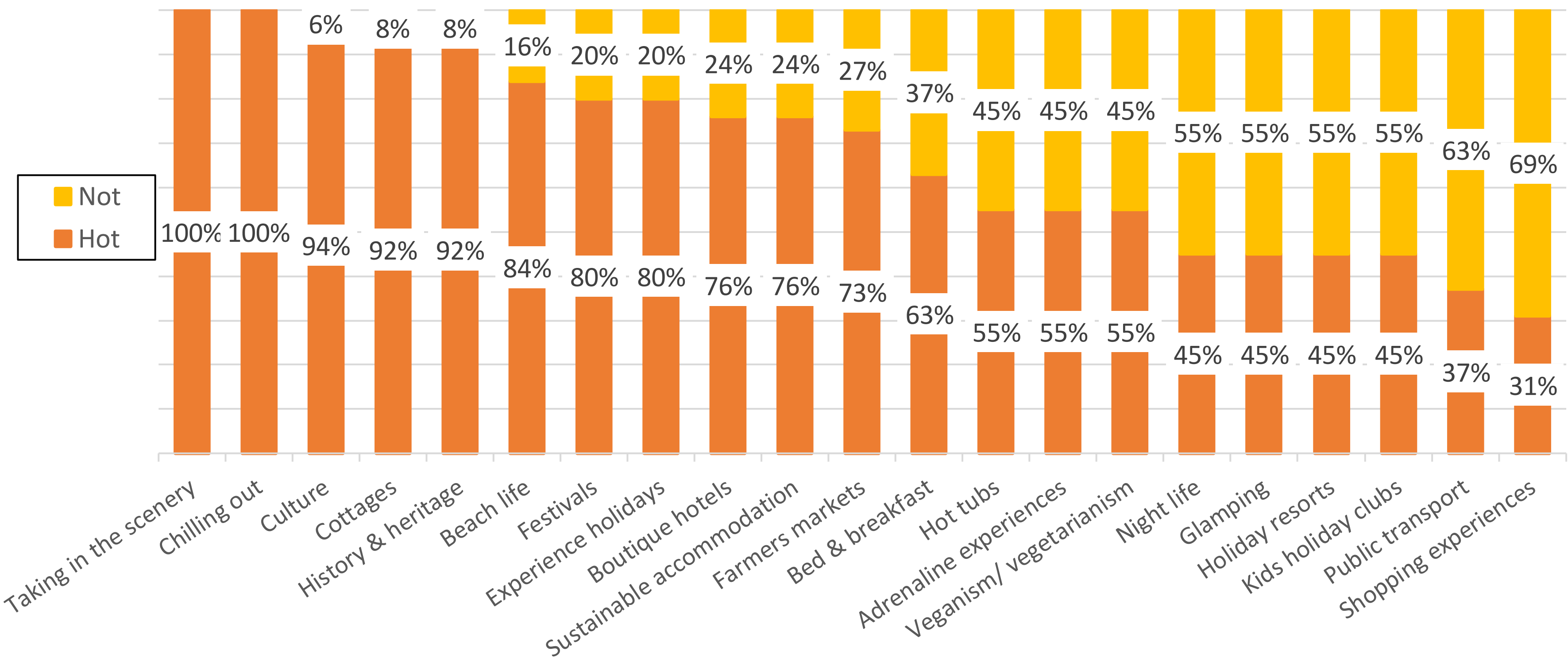
Visitor insights

What's hot, what's not?

The Focus Groups tried to get under the skin on any new emerging trends for tourism but with limited success.

- From the outset, it was clear that respondents struggled to answer from the perspective of trends relating to society more broadly and instead, tended to answer with reference to what they personally or as a family would engage with and see as desirable whilst on holiday. Here's what they said…

- There are probably few surprises in what was selected as hot, although they still provide some useful reminders for marketing. Probably more surprising and interesting are the things cooling off towards the end of the chart where the majority respondents didn't feel those aspects were hot – or perhaps they just felt they weren't hot in Cornwall. Perhaps another area for more focused research moving ahead.



Data derived from Mindset Research Qualitative Research Findings summary report May 2023

What’s fallen out of fashion?

The focus groups explored some of those areas that weren’t hot and the reasons why:

- It’s difficult to identify consistent trends in this respect, especially in relation to Cornwall, where the core attractions of sandy beaches, beautiful scenery and quaint fishing harbours have a timeless quality.
- In many instances, the experience parents want to give their children is similar to their memories of Cornwall from their own childhood: to an extent, little has changed.
- However, there is a sense that they are more demanding:

- They are not prepared to put up with dated caravan and holiday parks…
- …especially when then are seen to be charging premium prices for a sub-premium offer.

- They also expect activities, attractions and experiences to be on hand for all the family (in the same way that recent generations of children have in general enjoyed – and expected – a far greater range of clubs and activities than their parents did when they were growing up).

Data derived from Mindset Research Qualitative Research Findings summary report May 2023

Looking ahead – emerging trends

What are the emerging trends?

The Focus Groups undertaken for this project suggested that for all groups – families and post-family – holidaying patterns have been greatly disrupted in recent times, primarily by Covid but, post-pandemic, the cost-of-living crisis is also influencing the way that people think about and plan for holidays.

- Other emerging trends amongst the groups were:

  - ***A greater emphasis on activities and experiences***. Certainly 'adrenaline experiences' are becoming more and more popular, ***but the range of interests is broad*** (e.g. photography; fishing; yoga; wellness; foraging; walking; cycling etc.)

  - There is interest both in these types of activities being available to access while they're on holiday **but also in dedicated special interest and activity** *holidays.* Many empty nesters and seniors expressed an interest in holidays of this type, but it was also interesting that ***mums and dads are organising 'me-time' breaks, away from their families*** – this looks like an emerging trend?

  - Foreign holidays are once again an option for many, and it is clear from the focus groups and depths we conducted that many holidaymakers are being drawn towards these ***on the basis of value for money. In this respect, all-inclusive deals are especially attractive, and this looks like being a trend set to continue.***

Data derived from Mindset Research Qualitative Research Findings summary report May 2023

What are the emerging trends?

The Focus Groups suggested that ***sustainability is not a key consideration at this stage when choosing a holiday, indeed some already felt that taking a UK holiday in itself was taking the sustainable option***. However, the latest Cornwall Online Survey data gave results to the contrary with the *majority claiming it was an important factor in the decision making process*. T

- However, groups acknowledged that there ***are growing pressures towards greater sustainability*** in relation to holidays.

- Currently, very few claimed that, for example, they include sustainability credentials amongst the list of requirements when searching for and booking holiday accommodation: **there are too many other factors – including price – to consider.**

- However, in contrast, the latest survey findings (Cornwall Online Visitor Survey) indicate that sustainability is important or very important in the decision-making process for the majority of respondents when considering which destination to visit **(77% stating the sustainability of their visit was an important or very important factor in their decision-making process). But maybe be a tie breaker rather than a deal breaker.**

Data derived from Mindset Research Qualitative Research Findings summary report May 2023/ Cornwall Online Visitor Survey 2023

What are the emerging trends?

When asking domestic holidaymakers about the three most important aspects when deciding on a holiday destination in the UK, ***scenery ranks first***, selected by 53% of respondents, followed by ***wide range of activities nearby*** (44%) and ***low-cost accommodation*** (43%).

- ***Physically-challenging activities, such as rock-climbing or mountain biking, will offer a way to encourage younger Brits to engage with nature on holiday***. 39% of domestic holidaymakers would be interested in taking part in such an activity on holiday in the UK, peaking at 60% of 16-44 year olds. Offering different levels of activity, such as easy or challenging, will help to make physical activities accessible to more people and reduce the barrier to those who fear they are not fit enough to participate.

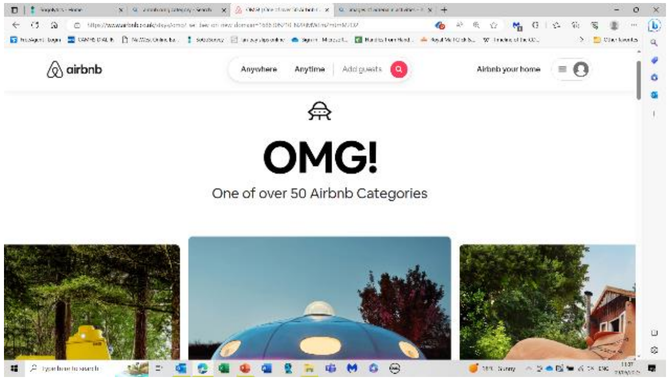
- There are clear differences between age groups though. ***Over-55s are more likely to be drawn by scenery, historical/cultural landmarks and a short journey to the destination***, while younger audiences care more for a ***wide range of activities nearby, low-cost accommodation and unique accommodation.***

Data derived from Mintel "Domestic Tourism UK: 2022"report 2022

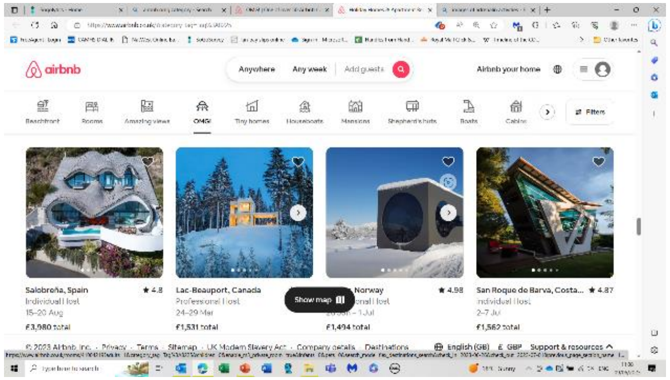
Accommodation trends

Whilst low-cost accommodation was in the top three most important aspects when deciding on a destination there are some differences between groups and the research goes on to suggest that unique accommodation will help to attract more visitors to a region. Another reminder that not everyone will be impacted by the cost of living crisis when taking a UK holiday and brands are investing in unique accommodation to make them stand out

- The Mintel research states that for ***20% of domestic holidaymakers aged 16-34, unique accommodation is among the most important factors when deciding on a holiday destination in the UK***. Those with an annual household income of at least £50,000 also place a higher importance on the uniqueness of the accommodation ***suggesting that a surcharge can be added when offering something unusual or special***.



- In June 2022, Airbnb launched its $10 million OMG! Fund to help finance the development of unique spaces that offer an immersive guest experience.



Data derived from Mintel "Domestic Tourism UK: 2022"report 2022

Attraction trends

With regards to Visitor Attractions The Mintel Visitor Attractions UK 2022 report suggests that:

- Consumers will increasingly expect to see tangible value within their purchases – including within visitor attractions.
- Brands should focus on promoting exhibitions or shows included in ticket prices, which will also help to boost visitation during off-peak times.
- Operators should publish schedules online for visitors to plan their visits around, as well as offer interactive experiences for consumers to fully immerse themselves within the attraction.
- Whether this be helping out at feeding time at the zoo, taking part in a drawing class at an art gallery or participating in a workshop at a garden, such experiences will be memorable for visitors and encourage them to return for another experience in the future.

Data derived from Mintel "Visitor Attractions UK: 2022"report 2022

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