

HCC TOURISM STRATEGY DEVELOPMENT WORK
Working Paper 3 – Implications of changes since 2000

Change	Implications
<p>1. Since 2000, competition in the travel world has continued to grow, and consumers have become ever better-travelled and more 'marketing savvy'.</p>	<ul style="list-style-type: none"> • Need for more sophisticated, market-focused destination marketing/skills and pooling of marketing budgets/resources to resource this • Strongest brands need support in order to compete in crowded marketplace - differentiation will be key • Importance of continuing investment in the tourism product/visitor experience in order to compete - local authorities should work together to make the area attractive to investors, and invest in the public realm
<p>2. Since 2000, there has been an explosion in the use of new media for travel information and booking.</p>	<ul style="list-style-type: none"> • Need for a strategic market-focused approach to online marketing and information • Importance of partnership work to present potential customers with a coherent message and rich source of data
<p>3. Since 2000, more and more people are making 'green' consumer choices.</p>	<ul style="list-style-type: none"> • An opportunity for Hampshire/Hampshire destinations to underline green credentials • Importance of work developing and supporting local supply chains, public transport, countryside management, green business initiatives
<p>4. Since 2000, hotel development in Hampshire has boomed, and several new developments are being planned - nearly all are corporate 'branded hotels'.</p>	<ul style="list-style-type: none"> • Need to build new corporates' needs/impacts into supply-side planning - eg tourism data gathering, advice for planners -, re-assess need and provide advice for planners related to new supply picture • Need to work with new corporate hotels to take part in partnerships, especially to use local supply chains (more difficult than local businesses)

	<ul style="list-style-type: none"> • Look for initiatives that support quality independent accommodation • Focus future development work on non-hotel sectors
5. Since 2000, passenger numbers at Southampton and Bournemouth Airports have grown significantly - but most are outbound.	<ul style="list-style-type: none"> • Partnership work with Airports and operators to increase inbound business - likely to be destination marketing work
6. Since 2000, a new planning system has come into being, resulting in a regional Plan that proposes significant economic growth and urban development for South Hampshire over the next 20 years.	<ul style="list-style-type: none"> • Opportunity to build visitor economy development strongly into economic development • Stronger economy and increase in population should strengthen visitor businesses and therefore visitor offer • New business investment will need supporting business tourism facilities (quality accommodation, meetings facilities, restaurants, bars etc) • Decision makers likely to focus on local impact; tourism likely to go down list of priorities - growing importance of advocacy • Local people (already expected to accept population growth) could resent visitors as adding to pressure on stretched services, congestion etc - tourism development must apply V.I.C.E. model, and visitor management will become very important
7. Since 2000, there has been significant investment in Hampshire attractions and cultural events.	<ul style="list-style-type: none"> • Support the best and most market-focused existing attractions • Make sure that planners and economic development/regeneration people appreciate the situation and that they only encourage new attractions if they respond to a clear market demand and add to Hampshire's distinctiveness
8. Since 2000, watersports have become increasingly popular.	<ul style="list-style-type: none"> • Watersports is a key market opportunity for Hampshire - Hampshire has great watersports potential • Learn more about the watersports market. Develop programmes for market-

	focused product development and marketing.
9. Since 2000, London has won the Olympics 2012.	<ul style="list-style-type: none"> • Make sure that the Hampshire destinations benefit from national tourist board / DCMS initiatives related to 2012 (eg pre and post event international marketing, accommodation quality initiatives) - need to get Hampshire destinations onto VB radar • Rail links between London and Hampshire destinations will be important to position them as easy-to-reach for overseas visitors to London.
10. Since 2000, we have a new, larger tourist board - Tourism South East - and Hampshire Tourism Committee has been established.	<ul style="list-style-type: none"> • Need to agree respective roles of the HTC and the Hampshire destination partners, to avoid duplication/fragmentation and exploit the benefits of partnership working as much as possible
11. Since 2000, TSE have undertaken research that identifies the key destination brands in Hampshire as (in descending order of strength): the New Forest, Winchester, Portsmouth, Southampton, the South Downs and Hampshire.	<ul style="list-style-type: none"> • Crucial to strengthen the brands in order to compete with the big brands in the market place • Hampshire places outside these brands should ally themselves to them
12. Since 2000, the New Forest National Park has been created, and South Downs National Park is planned.	<ul style="list-style-type: none"> • V.I.C.E. model critically important • Opportunity to raise national and international profile • Important to focus marketing on high-spend staying visitor segments who will travel outside peak times - need to support sensitive development of rural tourism facilities to meet their needs • Need to make sure that South Downs not just associated with Sussex in people's minds
13. Since 2000, local authority tourism departments have been increasingly under budget pressure - leading to some districts	<ul style="list-style-type: none"> • Need to identify opportunities for joined-up work - pooling resources to achieve maximum effectiveness and economies of scale • Need to develop robust data and make the political case for support for tourism -

closing or shrinking their tourism services and TICs.	persuade politicians to keep some budgets for joined-up work at the very least
14. Impact of terrorism	<ul style="list-style-type: none">• Disruption to flights favours domestic market• Important to prioritise development of domestic market over more susceptible overseas markets