Appendix I

Welcoming Visitors

STRATEGIC TOURISM VISION & ACTION PLAN

2015-18

Lewes District Council, September 2014

Contents:

SECTION 1 - VISION & STRATEGIC PRINCIPLES

"Lewes District is an area of contrasts – with the rural countryside of the South Downs National Park sitting alongside more urban coastal areas. However, irrespective of the location, our District is a place of outstanding beauty. It is extremely well connected to key destinations such as London, Gatwick Airport and, along the coast to Brighton and Hove, Hastings and Eastbourne. The District also offers a convenient gateway to mainland Europe for leisure and business via the Port of Newhaven." Cllr Rob Blackman Cabinet Member for Business, Economic Development and Tourism

We have some incredible tourism, arts and cultural assets in our District. We have good access, stunning rural settings, historic towns and villages with a coastline where the South Downs meets the sea. There are unique attributes with stories of national and global recognition. These include Glyndebourne, Thomas Paine and the *Rights of Man,* Charleston and the Bloomsbury Set and the South Downs National Park which are four compelling foundations for our destination.

Tourism already brings in significant benefit to the local economy from thriving tourism, arts and cultural businesses. However we currently operate in a traditional and less effective way, supporting tourism through two staffed Tourist Information Centres and annually produced brochures alongside a basic online and digital presence supported by a budget-restricted marketing plan.

Our Vision looks to change our current public sector-led tourism and visitor economy support function, moving towards a more business-led, public sector supported role to deliver wider economic growth throughout the year plus bringing benefit to local residents. Specifically, tourism will be spread more evenly throughout the year by generating new visitors at off-peak times. And it will allow the District to be distinct as a destination, recognisable and standing apart from competitors.

By 2018, our Vision is to have a distinctive, well packaged, clearly signposted and well marketed tourism, arts and culture offer where leisure and business visitors come to the area, confident of the choice available and quality of provision. We will work with tourism, arts and cultural partners; seek external funding and support from businesses to achieve this.

By 2018, the value of tourism to the local economy will have grown on average by 3% per year, generating an additional 600 jobs, contributing to the wider Vision to improve the reputation of the District as a place for investment, to live, to study and to visit.

This will be achieved by getting the basics right, increasing our focus on cultural tourism, , having the right infrastructure in place and improving our destination marketing in partnership with our tourism businesses.

Lewes District Council's primary role will therefore be to act as an **enabler**, **supporter**, **facilitator** and **advocate** of the tourism sector and wider visitor economy.

SECTION 2 - Thematic Action Plan

The Action Plan is built around seven core themes:

1. **Visitor Information Provision**

   How key information about the District's tourism offer is collected and disseminated to visitors and residents alike

2. **Destination Marketing**

   How the District and its tourism assets are promoted and marketed

3. **Events & Attractions**

   How events and attractions can be effectively supported through the Council's position as a strategic leader

4. **Local Business Engagement**

   How the Council can better engage with and help support the wider tourism industry

5. **Wider Partnerships**

   How the Council can effectively engage with and work with strategic and tactical partners and stakeholders to deliver growth in the visitor economy

6. **Research & Intelligence**

   How the Council can support the wider tourism industry through essential research and intelligence gathering

7. **Quality & Skills**

The Action Plan is designed to cover the next three years from 2015 to 2018, working towards the longer term destination Vision. It is a living document and will be periodically updated and rolled forward by the stakeholders. The actions cover a mix of things - work that is currently in hand, new initiatives, revised priorities and ways of doing things differently.

Year 1

Action	Milestones & Indicators	Next Steps
1. Visitor Information Provision		
Explore options for future provision of TIC services, district wide.	Production of completed study and recommendations into TIC services	Create and implement detailed plans for the future of each TIC. To feed into TIC report.
Investigate the provision of an information centre service based at Southover House		Feasibility study of alternative locations within Lewes. Reception at Southover House or possible partnership arrangements. To feed into TIC report.
Look at the feasibility of a mobile TIC service.		Research and feasibility appraisal of a LDC wide mobile TIC service. To cover core locations, key events and to be used as a distribution vehicle to the VIPs. To feed into TIC report.
Feasibility of official satellite LDC managed Tourist Information Point (VIP) sites – with phone-link/display-only options.		Identification of potential sites, feasibility study, what legal MOU/SLA agreements needed. To feed into TIC report.
Explore potential for information desks and displays within partner locations, independently managed but LDC supported		Work up concept with possible partners, feasibility study any agreements needed. E.g. in hotels, visitor attractions, retail shops etc. To feed into TIC report.
Inform and consult with wider tourism industry about changes and transition of the TIC service	Prior to production of TIC report.	Communications plan with public and partners/stakeholders
2. Destination Marketing		
Look at the viability of continuing with an annual printed destination guide and its distribution	Immediate. Marketing programme and methodology need preparing for 2015 season.	SLA for outsourcing of production of guide (including distribution), mobile enabled website and social media. Identify seed-corn funding profile on a reducing basis for contract period.
Ensure the Visit Lewes website is fully enabled for mobile devices		
Develop a social media strategy, specifically a Visit Lewes, Twitter and blog opportunities		

Action	Milestones & Indicators	Next Steps
Integrate Lewes independent B&B Group content within the official destination web site		
3. Events and Attractions		
4. Local Business Engagement		
Create a definitive database of tourism related businesses and contact points	Completed database	Compile list, cross-check with directories and databases. Maintain list and key information including email addresses.
5. Wider Partnerships		
Finalise exit from Enjoy Sussex Partnership		Immediately complete exit.
6. Research and Intelligence		
Collect data from businesses on market segments and reasons to visit.	Access to industry data	Identify key industry contacts that will share data. Possibly via focus group methodology.
7. Quality and Skills		

Year 2

Action	Milestones & Indicators	Next Steps
1. Visitor Information Provision		
Maintain the role of collection, co-ordination and distribution of visitor information to both visitors and wider industry.	To follow preparation of TIC report in year 1	Develop procedure for collection coordination and maintenance of key district wide visitor information dissemination.
Assess the provision of local visitor literature collection and distribution services		Assess service currently available, possible linked to the creation and servicing of a VIP/Partnership network.
2. Destination Marketing		
Look at the viability/scope for a Visit Lewes/pan-District 'App'	Ideally for 2016 season	Review existing App provision e.g. Lewes Chamber of Commerce App - discuss taking space on current provision.
Assist local tourism businesses to access digital marketing expertise	% tourism businesses digitally enabled. No of businesses receiving digital training	Digital audit of LDC tourism businesses to identify local best practice. Explore digital training package for rollout across the District.
Look at digital relationships with neighbouring destination web sites and portal sites e.g. Love Sussex, Visit Brighton	Prepare for 2016 season. Amount of links and traffic stats to LDC sites.	LDC to engage with key site managers to procure exposure, preferably on a partnership basis but to consider some paid-for exposure.
Look for opportunities on third party high-profile web sites e.g. Ferry Company, Glyndebourne, SDNP, Train Companies, University	Prepare for 2016 season. Amount of links and traffic stats to LDC sites.	LDC to engage with key site managers to procure exposure, preferably on a partnership basis but to consider some paid-for exposure.
3. Events and Attractions		
Enable Artwave to develop into a community-led event supported by and not run by the Council	Transition to community-led, independent status format. Increase participation across whole District.	Create joint steering group and agree transition plan, whilst continuing building and developing Artwave success.
Assess the scope to use annual headline events such as Jazz Supreme and Glyndebourne season to generate additional bed nights in the District	Secure key event for 2016 onwards. Additional bed nights stayed.	Review EIS for previous events. Plan maximisation of EI for future events e.g. ticket packaging with accommodation. Encourage external events to allocate more 'packaged' tickets with accommodation.

Action	Milestones & Indicators	Next Steps
Provide event support services such as ticketing and 'one-stop shop' advice across all public sector organisations. Manage Council involvement for hosting events.	RoI/leverage indicators. Events budget 2016/17. Number of events supported.	Identification and formation of a one-stop service across all public services. Assistance and advice to events on securing alternative funding.
Undertake an audit and scoping work of the wider heritage provision, interpretation and visitor experience within Lewes District e.g. town walk and trails, Lewes Castle, Newhaven Fort, Seaford Martello	Specific inclusion within the visitor survey. User-generated content. Number promoted within LDC.	Identify opportunities with heritage providers, local heritage groups and Town Councils to maximise visitor experience across District heritages sites.
4. Local Business Engagement		
Integrate tourism categories into Lewes District Council Business Awards Scheme	Next awards Additional categories	Seek sponsorship for tourism categories.
Develop business engagement strategy and look at the scope in the longer term to establish a formal public and private sector tourism partnership and identify the stepping stones to achieve it.	Programmed communications e-shots, newsletters, events.	Compile an annual B2B comms plan. Consult with key LDC tourism industry representatives as to desire for a district-wide DMO/DMP
Identify opportunities for senior officers and Members to directly engage with tourism industry	Number of engagement opportunities created	Identify which officers and Members are appropriate for industry engagement. Briefing and training.
5. Wider Partnerships		
Strengthen relationships with local partnerships such as the Love Sussex Group, Cultural Destinations Partnership, East Sussex Arts Partnership and Sussex Tourism Officers Group	For 2015 season. Webstats and links to LDC sites	Maintain participation in groups, maximise impact of investment. Review results. Consider joint marketing initiatives such as Excursions 2015.
Identify tourism opportunities arising from the "hub" and "gateway" designation to the South Downs National Park	On-going Status of Lewes as a key SDNP gateway & hub	Maintain participation and assess what benefits are available to LDC
Ensure tourism in Lewes features within Tourism South East, Coast 2 Capital and South East LEP initiatives	On-going Support of visitor economy in both LEPs	Maintain participation and assess what benefits are available to LDC
6. Research and Intelligence		
Commission an annual Cambridge Economic Impact Survey	Bi-annual Comparison of key stats and trends	Commission bi-annual Cambridge volume & value model, encourage pan-Sussex participation for benchmarking data/findings

Action	Milestones & Indicators	Next Steps
Carry out a bi-annual visitor survey in the main District towns	Bi-annual Comparison of key stats and trends	Commission bi-annual Visitor Survey, encourage pan-Sussex participation for benchmarking data/findings
Share appropriate LDC tourism data & research with other organisations and businesses	Industry feedback on LDC research commissioned	Event and/or mechanism to disseminate research to industry e.g. annual conference
Carry out an annual industry "health check" survey	End of season 2016 Basket of key KPI indicators	Agree data required, compile survey and use industry database to secure responses. Possibly use independent research company for impartiality.
Carry out research on events, specifically Artwave and major events	Detailed disclosure by all participants. Visitor surveys to assess event.	Disclosure contract with participants. Commission specific event visitor survey and EIS.
Carry out research to support the LDC Core strategy and hotel futures work	2015/16 Identification of possible hotel sites	Link to planning policy to identify need for hotel futures study
7. Quality and Skills		
Link up tourism industry with wider apprenticeship and young worker schemes, particular reference to LEAP and Newhaven UTC	No of apprentices and young workers employed in industry as a result of LDC intervention	Engage with LEAP and Newhaven UTC (also reference SELEP/C2C schemes)

Year 3

Action	Milestones & Indicators	Next Steps
Monitor and manage external online material about the destination, specifically Trip Advisor and key User Generated Content (UGC) sites	On-going task, quarterly reporting of content.	Nominate responsibility. Initial audit of current UGC, setting up of monitoring and alerts.
Review the change of policy to work with non-graded accommodation	Integration of all accommodation within LDC marketing.	Formalise LDC non-assessed policy and procedures for dealing with providers. Inform accommodation providers of changes.
Create greater awareness of access and equality issues and standards across the industry both in private sector and public sector/public realm	Number of mobility accreditations within district	Access audit of sector and key public realm locations commissioned. Programme of industry education and mentoring to become accessible.
Work with strategic partners e.g. SDNP on environmental, sustainable and green tourism initiatives e.g. Green Tourism Business Scheme	Number of green accreditations within district	Audit of sector and key public realm locations commissioned. Programme of industry education and mentoring to become sustainable.

SECTION 3 -BACKGROUND

- **The Strategic Context**
- **Market Insights**
- **SWOT**

The Strategic Context

1. This Vision and Action Plan has been produced with the Council's "One District, One Council" approach at its core:

- unswerving commitment to excellent services
- uncompromising commitment to quality
- unlocking the talents of staff to improve services

2. We have referenced the Regeneration Strategy for Lewes District Council 2012-15 "Building a Brighter Future" which has 'Welcoming Visitors' as one it's five key priorities. The target is to increase visitor spending, achieve higher levels of visitor satisfaction and boost awareness of the area amongst visitors and local businesses.

3. The actions and outcomes from the LDC 'Lewes District Public Realm Framework' (Draft 2013) will also impact on the wider tourism and visitor economy as well as local residents. We support the report findings and references to the importance of quality public realm to the wider visitor economy.

4. From a wider County-wide perspective we acknowledge and reference East Sussex Economic Development Strategy 2012 which states: "By 2021, East Sussex will boast a thriving and high value visitor economy, renowned for its natural assets, unique heritage, culture, market and coastal towns."

5. Also from a wider Countywide perspective we acknowledge and reference the East Sussex Cultural Strategy 2013-2023 which states: "Priority Three: Develop and promote a well packaged cultural tourism offers which celebrate the identity of East Sussex, raises its profile and attract more visitors and businesses to the County".

These local references to the value of the tourism sector and wider visitor economy are supported by national strategies and recent statistics demonstrating the contribution of the wider visitor economy to the nation's economic growth:

A Strategic Framework for Tourism 2010-2020: produced by Visit England. Outlining the growth potential within the industry. Setting the wider aspiration to grow the industry year on year by 5%.

Government Tourism Policy, March 2011: The long-awaited and most recent Government tourism policy, setting the scene for 2012 and the Olympics and the legacy impact goals thereafter.

Britain Tourism Strategy: Visit Britain April 2013, to deliver a 'Golden Legacy' 2012-2020 through: Enhancing Britain's image, Ensuring Britain is packaged and sold more widely, Broadening Britain's strong product offering and Making visiting Britain easier.

Domestic Leisure Tourism Trends 2013-2023 produced by Visit England in late 2013, charts the positive impact of the 'staycation' phenomenon and growth potential of the domestic market.

Also in late 2013 Deloitte and Oxford Economics produced the most detailed study on the economic impact of tourism in the UK for some years. Their headline findings were:

- UK tourism economy set to grow 3.8% per annum – faster than manufacturing, construction and retail
- Currently worth £127bn – growing to £257bn by 2025 - 10% of UK GDP
- Supported 3m jobs throughout the UK in 2013 (9.6% of UK total)
- Accounted for 1/3 of the net increase in UK jobs between 2010 & 2012 (175,000 additional jobs) - and is forecast to support 3.7m jobs by 2025
- Inbound tourism driving force of growth - forecast to grow from over £21bn in 2013 to £57bn by 2025

Local Enterprise Partnerships: (LEPs): Lewes District is part of two LEPs - South East LEP (SELEP) and Coast to Capital (C2C). Both LEPs have identified the visitor economy as a key economic driver within their respective Strategic Economic Plans, submitted to Government in December 2013 to be finalised in March 2014

SELEP: Extracts from Strategic Economic Plan

- *"…There are other significant sectors in the SE LEP area. These include the tourism sector, which employs 95,900 people, accounting for about 6.6% of total employment and 2.7% of total economic output49. The visitor economy is particularly important in SE LEP's rural and coastal areas; we estimate that 23,000 jobs in coastal areas are directly dependent on this sector in our coastal communities".*
- *"…Together, creative and cultural industries and the visitor economy*
- *are important drivers of economic growth, particularly to realise opportunities in our coastal and rural Communities".*
- Referencing the East Sussex Area: *"…The prime local environment of the county forms the foundation for the visitor economy; this includes the only National Park within the SE LEP area.*

C2C: Extracts from Strategic Economic Plan

- *"…The visitor economy is very significant for the Coast to Capital area – both in terms of direct and indirect employment. It contains the country's second largest airport, significant coastal resorts and a major part of the South Downs National Park". Overall, the tourism and leisure sector accounts for 5,500 businesses and employs 37,000 people, around 4% of total employment in the LEP area..."*

- *"Additional (priority) sectors also importance in the Coast to Capital area include tourism, horticulture/food and drink…"*

- *"…In addition we have also identified two local sectors which will generate growth and jobs:*

- *"Tourism – particularly the South Downs National Park, the Coast, Brighton and fully exploiting the advantage conferred by Gatwick Airport…"*

Market Insights

This section of the report looks at tourism markets, the impact of the recession and lifestyle trends. There are six components of the tourism market.

DAY TRIPS FROM HOME (trips of 3+ hours) A core market for most destinations and visitor attractions in terms of visitor volumes. This has been driven by a huge rise in wealth and leisure time over last 20 years and strong demand for food, drink and retail (with significant changes in eating and shopping habits). It is also health driven witnessed by the growth in gym memberships and greater participation levels in walking, cycling and various specialist pursuits. There is growing interest in the countryside, our landscapes, heritage, arts, market towns and quiet coastline.

SHORT BREAKS (typically 1 to 3 nights) A core market for most destinations and especially accommodation in terms of visitor volumes and spending. Growth is mostly coming from the same people taking more frequent trips, particularly couples on weekend breaks, midweek breaks by older age groups and coach tours for the less mobile. There has been the renaissance of UK city destinations and rising popularity of European cities.

VISITING FRIENDS AND RELATIVES The Economic Impact Study indicates 63% of all bed-nights in Lewes are spent at friends and relatives. Their behaviour here is influenced by local residents who provide advice and accompany them on days out (over 3 hours). The sector is growing due to the recession, our increased mobility, the nature of extended families and their geographic dispersion (including ex-pats on trips back). It typically encompasses family functions, special occasion gatherings and reunions. This stimulates the food and drink sectors, visits to attractions, events, entertainment and leisure.

LONGER HOLIDAYS (typically 7 to 14 nights) A segment now in renaissance with more people switching from overseas to UK holidays due to the recession. This is family dominated, focused on the school holidays and is very seasonal. Self-catering and caravanning is popular particularly in coast and countryside locations. Holidays in the UK appeal most to families with very young children, those on lower incomes, the less mobile and those who simply prefer the UK product.

OVERSEAS (typically a few nights within a longer itinerary away). This is a volatile and growing market. The UK is now perceived as a world leader with a global image post Olympics and Diamond Jubilee. However, it is volatile due to exchange rates, oil prices, threats of terrorism and unemployment. National debt within the EU and the impact on overseas economies has in places been worse than the UK. The key markets are USA, France, Ireland and Germany although the fastest growth is coming from the Far East and China (which tend to be non-English speaking markets). This sector includes foreign language students.

BUSINESS (typically 1 to 3 nights or day meetings) A core market for serviced accommodation and meeting venues with good spin-off across the hospitality sector. Whilst a lot of business travel is non-discretionary (people away on business wherever and whenever it takes them) there are sectors which can be influenced such as conferences, training courses, business meetings, exhibitions and product launches. The small meetings market is important (up to 30 delegates), held mostly midweek and outside of school holidays, in convenient and accessible locations for the delegates.

THE ECONOMY AND THE RECESSION

The impact of the recession has been regularly monitored over the last few years by Visit England. It has had a big impact on tourism and travel over the last five years. Most people have been very concerned about the economy and most expected it to get worse before it got better. The main concerns have been job security and making ends meet. Nearly 30% of the population have been seriously affected with only 8% unaffected. Overall 63% of people have been going out less and 41% have been spending less on holiday, especially amongst 35 to 54 year olds and families. The greatest optimism has come amongst under 35's, men, those in the private sector and those in London.

As a result the holiday market was flat in 2012. The impact of the poor weather also influenced 17% of trips with people going abroad, shortening or cancelling trips. Yet "staycations" have continued to grow with 21% switching from holidays abroad to the UK. This switch has been due to financial concerns, the opportunity to see more family and friends, attend events, generally being more positive about England, and wanting to try somewhere new or going back to a place they liked. More interest is being shown in coastal locations and rural escapes.

The increase in domestic trips and parallel decline in overseas travel was initially driven by cost but other factors are now contributing to this trend as we start to move out of the recession.

The emerging trends now indicate there is a rising desire for a break from routine and reality as an antidote to the daily stresses and strains. This is leading to multiple short breaks in a year, rather than waiting for the big holiday. A further factor is the concern about being away from work for too long by the self-employed. There is less enthusiasm about European short breaks with some disaffection with low-cost carriers, increased flight prices, airport hassle and inconvenient departure times or airport locations.

There is a greater search for quality and value from people taking more time to research deals and get added value, aided by the proliferation in social media and web sites with inspirational ideas.

There is also the planning v last minute dynamic. The last minute trip allows decisions to be deferred until budgets are certain, coupled with a belief that this leads to lower prices, plus the technology which allows booking "on the hoof". However, some people still prefer to book well ahead and know they have something later in the year to look forward to.

Looking to the future three different sets of intentions are now apparent: those who will yearn to return to taking more trips abroad; those who will keep the UK short break habit; and those who will take more UK holidays and short breaks but only as finances permit.

However, frugality is becoming a way of life. Household behaviours have changed such as switching energy suppliers, using discount supermarkets and generally searching (mostly online) for better deals.

TECHNOLOGY

The fast changing pace of technology is having a major impact on tourism. The world has moved on in the last five years with around 90% of UK adults now using the internet and 83 million mobile subscribers in 2013. The key signifier is now how people are using technology, not who uses it. Whilst younger consumers are more likely to "live" online, older consumers use it for more practical activities.

MOBILE DEVICES

Smartphones are quickly becoming ubiquitous in the UK with their penetration standing at 72% (86% of the under 35's and 42% of the over 55's) in 2013. Tablet ownership is currently at 51% (having grown from 16% in 2011). The top mobile searches include shopping, travel and weather.

This now creates a new and significant mobile advertising environment. This is the way people expect to find information in the future and expect to find free wifi hotspots out and about wherever they go.

The growth in mobile devices used "on the hoof" makes those web sites redundant which now take a long time to download to mobile devices and contain a mass of information which is difficult to navigate through and read on a handheld device. Apps will redefine how we do business over the next five years. Two-thirds of smartphone users regularly use dedicated apps.

SOCIAL MEDIA

Social media has now gone main stream. Facebook has 310 million daily unique visitors with 63% of the market share. Twitter by comparison has 22 million daily unique visitors but is rising fast.

Social media is fully incorporated within some people's lives especially families and pre-families. Whilst it is easy to think of this as a young person's world, around 44% of those over 55 use some form of social media. Different segments use social media in different ways for travel and tourism:

Pre-families: emotive inspiration and education

- Young families: discounts, packages, ease of doing things

- Older families: bonding, sharing, nostalgia
- Empty nesters: how to get the most out of the trip, learning

WHAT THIS TELLS US

There are two important conclusions from this technology summary.

1. The tourism sector must continue to provide inspiration, ideas and calls to action for UK short breaks so that the underlying goodwill prompted by the recession translates into future behaviour, yet still appealing to a frugality mentality.

2. Social media and mobile technology must lie at the heart of marketing and communications.

Lewes District SWOT Analysis

Strengths

- Lewes is a popular historic picturesque town and the county town for East Sussex
- Strong District-wide creative arts & culture focus
- Strong District-wide support for local food & drink
- South Downs National Park covers large proportion of the district
- Ditchling Beacon is an iconic South Downs 'destination'
- Strong annual programme of events throughout the District
- Good, small rural attractions
- Glyndebourne international profile event and cultural destination
- Unspoilt Seaford seafront
- Newhaven Port is a gateway to/from mainland Europe
- Proximity to Brighton & Eastbourne both SE 'attract' destinations
- Visitor Economy identified as a priority in both adjacent LEPs

Weaknesses

- No single focus for the destination or large attractor
- Newhaven currently in pre-regeneration phase
- Seasonality of core attractions e.g. Charleston
- Perceived accessibility to travel across entire district
- Consumer understanding of East vs. West Sussex
- Lack of quality branded accommodation stock
- Limited and very traditional destination marketing outputs
- Uncoordinated and under promoted events programme
- Limited use of mobile websites and social media innovations
- Lack of engagement with wider tourism industry

Opportunities

- Provision of financially sustainable visitor information service
- Exploit consumer trends in cross-platform digital information
- Integrate and potentially outsource marketing functions/outputs
- Inclusive engagement with accommodation providers
- Investigate District-wide skills packages e.g. Welcome Host Gold
- Commitment to the infrastructure and public realm
- Visitor welcome/management, initiatives/measures e.g. signage
- Provision of cultural tourism packages
- Targeted support for and key events and events organisers
- Potential from student population and learning resources at Newhaven UTC
- Greater engagement with wider industry and stakeholders

Threats

- Ability to support visitor economy with reduced public finances
- Competition from destinations with greater budgets & capacity
- Lack of continuity of joint marketing initiatives e.g. Enjoy Sussex
- Decline of Lewes area consumer recognition as a 'destination'
- Lack of inward investment by tourism industry e.g. hotels
- Loss of accommodation space to residential development
- Loss of economic benefits a vibrant visitor economy can bring
- Consumer demand for high quality instant visitor information
- Failure to react to consumer digital information trends
- Failure to meet emerging consumer demands and trends

• Identification of partnerships/alliances that will benefit LDC • Commissioning and collecting key research and intelligence data	• Softening or cessation of current 'staycation' trend