

Tourism Tourism Tourism Tourism

Policy from practice

Tourism is one of the largest industries in the UK, worth approximately £91.8 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:

- 13 million visitors to our pay-for-entry properties annually
- An estimated 50 million visits to our coast and countryside properties each year
- We care for a significant proportion of the country's designated sites and buildings, opening 300 houses and gardens to the public



Kedleston Hall, Derbyshire

 We work with opinion formers and decision makers nationally and in the East Midlands; including board membership of two Destination Management Partnerships.



Hardwick Hall, Derbyshire

- With a turnover of more than £300 million a year, we currently manage over 600,000 acres of countryside and over 700 miles of coastline in England, Wales and Northern Ireland.

 We promote and use 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.

The knowledge and understanding of tourism as an industry that such a large operation gives us is supplemented by the experience and practical focus that comes from our day to day operations: we are a 'big small' operator.

Our work underpins the essential environmental resources upon which tourism depends.

 We run over 400 working holidays a year, enabling volunteers to work at our properties.



Museum of Childhood, Sudbury Hall, Derbyshire

Learning from experience

Profit from beauty

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 communities. The 2001 Foot and Mouth outbreak vividly demonstrated this link, but the lesson is already being forgotten.

This dependence is also clearly illustrated in the findings of the 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.**

In the East Midlands last year over 700,000 people visited our pay for entry properties and millions enjoyed our countryside properties.

We have Europe's largest network of owner-managed holiday cottages - with over 320 cottages and an annual turnover in excess of £5 million.

The environment - a community asset

A high quality environment can underpin a tourism business with its attendant indirect and induced employment, but it also maintains the viability of a large range of often small rural businesses and provides attractive places where businesses and communities can thrive.

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** - it has been found that over 90% of visitors engaged in informal learning while visiting a National Trust property.



The contribution of tourism to **local identity and distinctiveness** is all too often overlooked. The Trust's Workhouse in rural Nottinghamshire could not provide the experience it does without the huge numbers of local volunteers who have invested their time and energy in *their* heritage. 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 cottages generate a surplus of over £2million which is ploughed back into the Trust's charitable work.

Our 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 the 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.

There are seven National Trust holiday cottages in the East Midlands, including White Edge Lodge in the Peak District. Originally a gamekeepers cottage, when the property was converted into a holiday cottage the Trust incorporated many environmentally friendly principles that provide effectively for modern day needs. The cottage is powered partly by a wind generator and solar panels,



water is extracted from the moor via a borehole and waste water is cleaned and returned to the moor through a "reed bed" type system utilising soft rushes, which are indigenous to the moor.

The cottage is an example of how investing in our historic and natural environment can deliver economic, social and environmental benefits - this is a great example of what sustainable tourism is all about.

The Workhouse

Built in 1824, The Workhouse, in rural Southwell, Nottinghamshire is the best preserved and least altered workhouse in England. In 1997 this nationally important building was under threat of being turned into residential flats. Within a matter of weeks the National Trust stepped in to buy it with emergency funds and started working to secure its long-term survival as a unique visitor attraction.

Today, The Workhouse has brought an amazing range of benefits:

- **Community Pride** - the restoration of The Workhouse to its present standards would not have been possible without the work of well over 100 volunteers, many of whom still give their time regularly. In addition to their time many have offered unique insights into The Workhouse through oral histories and personal memorabilia.
- **Learning and discovery** - staff and volunteers at The Workhouse have developed education programmes linked to the national curriculum, using a range of different activities from role play to debating, leading to children from all over the country visiting.
- **Awards and accolades** - The Workhouse has been awarded The Sandford Award for Heritage Education and received the RICS Building of the Year award, in the Building Conservation category.
- **140,000 visitors and 14,500 school children** have visited The Workhouse since it opened in 2002.
- **Boosting the local economy** - The Workhouse has worked closely with other tourism operators including Southwell Minster, which saw an 18% increase in visitor numbers during the first year of The Workhouse being open.



Future challenges that need tackling today

The spiralling 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.** But the imbalance is even worse in the East Midlands where foreign tourists account for just 7% of spend in the region, and yet Easter 2005 saw 25,000 people leave through Nottingham East Midlands Airport. That's 25,000 who could have been spending their money in the region. This growth has been fuelled by the rise in UK residents taking foreign holidays, especially short breaks, and is encouraged through the expansion of Nottingham East Midlands Airport. Expansion of the airport is thus not in the interests of domestic tourism industry - we lose far more than we gain.

The current solution has been on encouraging more overseas visitors to the UK with, for example, VisitBritain spending 3 times the amount on international marketing compared with marketing England to the domestic tourist. 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. In the East Midlands, the difference is even greater with domestic visitors accounting for 93% of the total spend. As the graph over the page shows, at a national scale, **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. The effects would be even more dramatic in the East Midlands.**

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We are supporters of VisitBritain and members of the DCMS Tourism Reform Implementation Group (TRIG) and the Association of Leading Visitor Attractions (ALVA).

Over 80 of our farm tenants offer bed and breakfast accommodation. There are 50 camping and caravanning sites and 21 YHA hostels on our land, including Ilam Hall YHA in the Peak District.

Future challenges that need tackling today

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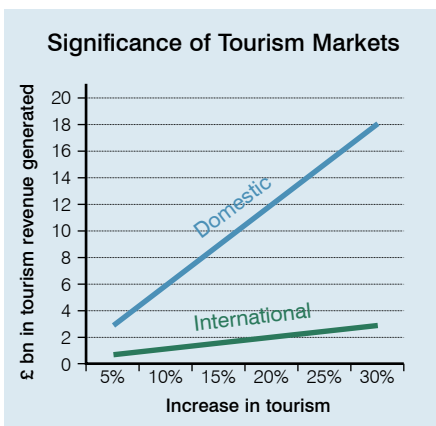
Providing better opportunities to holiday at home, meeting the growing desire for short breaks and extending the tourist season would bring welcome economic and other benefits to rural (and urban) communities. In addition it would reduce the risks involved with volatility in international tourism.



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.

So what can we do to deliver a sustainable tourism industry?

- Support, protect and enhance the environmental assets (natural and cultural) on which so much tourism depends;
- Promote and support local characteristics and distinctiveness, ensuring visitors have access to the "real thing" - a quality, authentic and inspiring experience;
- Promote the improvement of public transport and support car free tourism opportunities, including requirements for Visitor Travel Plans for new tourism developments and their introduction for existing sites;
- Have a target to reduce the current tourism deficit and an assessment of the different ways that this can be achieved;
- Promote quality, all year attractions not dependant on the weather
- 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 policy changes.



We invest significantly in domestic advertising and promotions - including events, press and media activity and as a partner with VisitBritain.

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

Tourism needs to raise its voice

Whilst many tourism strategies refer to the importance of natural and historic assets, the industry as a whole is not using its voice to ensure these assets are protected and utilised, nor is it allocating sufficient funding to improve these 'products'. The result is that policies relating to transport and land use planning which can degrade these assets are not challenged as they should be. The industry collectively needs to do more to protect its own long term interests.

We run 135 restaurants, cafes and tea rooms with a collective turnover of £17.5 million - the nation's largest network.

Contact details:

Regional Policy Officer, The National Trust, East Midlands Regional Office, Clumber Park Stableyard Worksop, Nottinghamshire, S80 3BE
 Phone: 01909 486411
 Email: matt.doran@nationaltrust.org.uk

www.nationaltrust.org.uk

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