



Nord-Pas de Calais
Créateurs d'horizons



westtoer



UNIVERSITY
OF APPLIED SCIENCES



SusTRIP

Sustainable Tourism Research
Intelligence Partnership

www.sustainabletourismresearch.eu



"Investing in your future"

Crossborder cooperation programme
2007-2013 Part-financed by the European Union
(European Regional Development Fund)

KENT GARDEN *of* ENGLAND

visitkent.co.uk

The Project

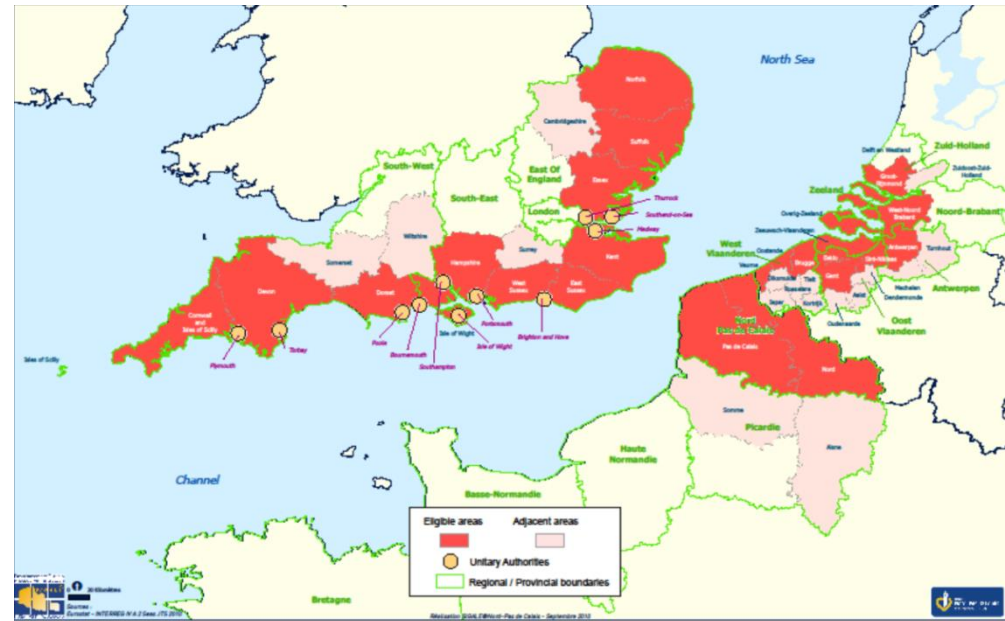
The purpose of SusTRIP was to jointly plan and implement a series of **research projects** which would help the 2 Seas region to sustain its vital **tourism industry**.

The projects were structured around the pillars of sustainable tourism

- Activity 1 – Sustainable Tourism
- Activity 2 – Supporting Tourism
- Activity 3 – Knowledge Platform

Worth 3.2m euros.

For Kent 680,000 euros



Activity 1 - Sustainable Tourism

Day Tourism

For all partners the Day Visitor market was the most important

SusTRIP enabled us to conduct a range of studies using different methodology to understand this market more.

For Kent this involved 2 Visitor Survey – one traditional face to face and one combining short face to face with longer online survey.



Activity 1 - Sustainable Tourism

Events Impact Model



Events are a key tourism offer in the 2 Seas Region.

The SusTRIP partners worked together to produce and test a common evaluation model for the economic, social and environmental impact of events.

COUNTRY	EVENT	TYPE
BELGIUM	Vlootdagen in Zeebrugge	Sport
BELGIUM	Dranouter aan Zee in De Panne	Music
FRANCE	Championnat de France de Cyclisme sur Route, Boulogne-sur-Mer	Sport
FRANCE	Tourcoing Jazz Festival	Music
FRANCE	Rencontres Internationales de Cerfs-Volants, Berck-sur-Mer	Sport
UK	Broadstairs Folk Week	Music
UK	Eurofair	Food & Drink/Cultural
UK	Dickens Festival	Festival/Cultural

Activity 1 - Sustainable Tourism

Visiting Friends and Relatives



Little was known about profile, behaviour and motivations of Visiting Friends and Relatives market in the 2 Seas Region

Through SusTRIP, Kent was able to conduct for the first time primary research into not only the market but the host community

Key Results

- Market was larger and more valuable than first thought – 51% of tourism trips to the county
- Both the visitors and the hosts were open to ideas and spending more – 15% stayed in non host accommodation and a further 37% could be encouraged to
- Active market - two thirds (67%) had gone out with their guests to eat or for a drink.
- Over half (54%) had gone shopping and more than a third (39%) had visited a tourist attraction.
- Key difference between Friends and Relatives

Activity 1 - Sustainable Tourism Accessibility

It was important to identify ways in which to make the 2 Seas Region more friendly and welcoming to visitors with disabilities.

Kent conducted 5 district audits on accommodation, attractions and transport in key areas highlighting gaps and opportunities for improvement as well as identifying barriers facing businesses in making their product more accessible.



Activity 1 - Sustainable Tourism

Image and Perception

Key Results

SusTRIP partners worked on a range of perception and image surveys to understand what are the key selling points of our area and which markets to target in the future.

Kent was able to commission perception research previously conducted in 2007. We were also able to take part in VE TRIM research through this.



- Top three aspects which are considered to make Kent unique, special or different are 'it is the garden of England' (67%), its 'long and rich heritage' (47%) and its 'proximity to the continent' (39%).
- The top five word associations selected were 'Garden of England' (77%), 'quintessentially English' (69%), 'Natural' (66%), 'Traditional' (62%) and 'Green' (58%)..

Activity 2 - Supporting Tourism

Self Catering and Camping Accommodation

Self Catering and Camping Accommodation is a key tourism asset for the 2 Seas Region.

SusTRIP partners conducted a range of surveys to understand the value, volume, motivation and behaviour of this sector.

Kent conducted an audit and a study in to future developments of the sector.



Key Results

- 111 self-catering businesses and a total 1576 letting units, 32% of which are cottages.
- 157 touring caravan and camping parks with a total 3793 pitches
- 94 holiday parks with a total 14,480 static caravan holiday homes and touring caravan and camping pitches. Kent holiday parks also have 1658 touring caravan and camping pitches.

Future Opportunities

- The conversion of existing barns into self-catering accommodation.
- The expansion, development and upgrading of existing touring caravan and camping sites and holiday parks.
- The increased development of luxury camping options.

Activity 2 - Supporting Tourism Business Barometers

The aim of each partner's business barometer mechanism is to gather year-round tourism and leisure industry performance data on the health of the tourism industry in the 2 Seas Region.



Visit Kent's Business Barometer 2011 End of Year Report

Kent's 2009 Economic Impact Model showed tourism is worth **£3.2 billion** to the county and **employs over 63,000** people who assist nearly **57 million** visitors each year.

2011 Summary

2011 proved to be a better year for weather for Kent. With good weather came good results for many and with early season sunshine, and sun during the Spring and Autumn half term, the year started and ended on a more confident basis than the end of 2010. Concerns for the economy were strong, with VAT and fuel price increases eating into profits, but people were still taking holidays and day visits and shorter breaks were strong.

Activity 2 - Supporting Tourism Economic Impact Model



*Manual for Economic Impact Studies in Tourism,
Using an Input-Output model*



Output	
Value added	Total
	Rel. to out
Income	Total
	Rel. to out
Employment	Total
	Rel. to out



The economic impact of tourism is a key but complex matter to evaluate for the 2 Seas Region.

SusTRIP looked for an approach that could be applied throughout the region and within the programme a PhD Study was conducted at NHTV Breda University of Applied Science.

Kent conducted two Cambridge Models as part of this project

A manual has been produced to guide people through the process on an Input-Output Economic Impact Model

Activity 2 - Supporting Tourism

Museum Impact



Museum and cultural attractions are a key part of the tourism offer in the 2 Seas Region and providing them with a tool to assess their economic impact will enable them to be more effective.

Piloted by Comite Régional de Tourisme and then rolled out to Westtoer a museum impact model has been developed and tested.

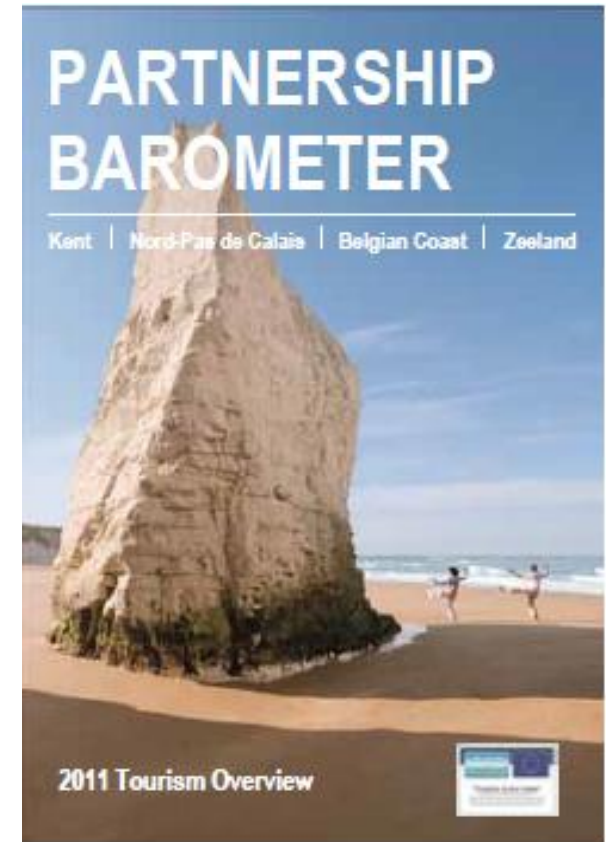


Activity 3 – Knowledge Platform

Sharing Indicators

BENCHMARK OF HOTEL STATISTICS IN THE 2 SEAS REGION, 2011

	KENT COAST	CÔTE D'OPALE	FLEMISH COAST	ZEELAND
SUPPLY				
Number of hotels	144	154	252	225
Number of rooms	3,491	5,157	6,222	4,188
DOMESTIC GUESTS				
Arrivals	-	675,680	778,957	428,800
Nights	1,516,000*	1,066,434	1,608,474	790,600
Length of stay	-	1,6 nights	2,1 nights	1,8 nights
INBOUND GUESTS				
Arrivals	-	488,129	275,280	314,200
Nights	580,000*	727,227	662,373	720,200
Length of stay	-	1,5 nights	2,4 nights	2,3 nights
TOTAL GUESTS				
Arrivals	-	1,163,809	1,054,237	743,000
Nights	2,096,000*	1,793,661	2,270,847	1,510,800
Length of stay	-	1,5 nights	2,2 nights	2,0 nights



One of the main activities within the SusTRIP project was getting to know each other's baseline tourist information: what data is collected by each region, what methodologies and definitions are used. The aim was to try and benchmark where we could

Activity 3 – Knowledge Platform Research Forums

Six Research Forums and one final conference were held throughout the partner regions on different subjects to share experience, best practice, methodologies and results of the programme.



SusTRIP

Sustainable Tourism Research
Intelligence Partnership

www.sustainabletourismresearch.eu



“Investing in your future”

Crossborder cooperation programme
2007-2013 Part-financed by the European Union
(European Regional Development Fund)

Benefits

- Funding
- Conduct Primary Research
- Pilot different methodologies
- Share best practice
- Work with knowledgeable and experienced research professional
- Support for tourism businesses
- Research becoming a central function with Visit Kent

Challenges

- Administration
- Benchmarking
- Cultural differences
- Timescale
- Maintenance and Upkeep
- Legacy

A new partnership, new connections
and new friends on which to build

Future Opportunities

- Research function continues to be a challenge to finance
- We are already working on Interreg V which is being launched in November.
 - Tourism is no longer a priority so will be more challenging
 - Unlikely to be submitting a research only project but thanks to SusTRIP research is seen as integral to any future bid
- Also looking at other programmes – Horizon 2020, Interreg Europe
- And it is all about new technologies, digital and big data – some exciting work already happening in Europe