



TSE Briefing to the SEEDA Board March 2008

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3. In the Spotlight:
 - 2012 Games
 - Centre for Sustainable Tourism
 - Skills
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Scale and Importance of Tourism in the South East

- Worth £10bn+ to the region
- 7% of regional GVA
- 250,000 direct jobs (FTEs) (400,000 including multiplier effects)
- Flexible job options for low-skilled, immigrants, students, parents and 'returners' (NSO: 80% of those who work part-time want to)
- Delivers income boost to the cultural sector
- Critical component of disadvantaged and declining areas (Rural and Coastal)

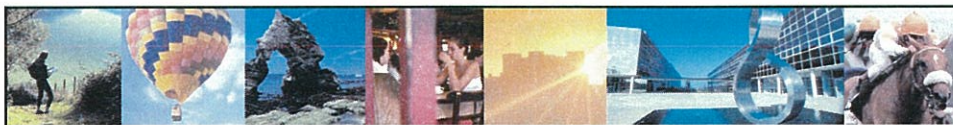
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Outline TSE corporate planning 2008/9 to 2010/11 'Hosting the World'

- Moving from annual core SEEDA funding of TSE to 3-Year funding settlement.
- Corporate Planning Options for TSE in '**Hosting the World**'
 - *"A strategic Partnership between SEEDA and TSE to deliver a sustainable visitor economy in the South East for 2012."*
 - Prepared September- December 2007
 - Considered at the May SEEDA Board
 - 2008/09 will be transitional
 - (Historic core funding of £2m. p.a. for the last 4 years)
 - 5 planning options prepared
- Full strategic review of TSE role and activities conducted during 2007. Main Findings:
 - The visitor economy is a key component of the SE region
 - TSE activity has a close and improving fit with the RES Implementation Plan
 - TSE has performed against the brief
 - Resources are scarce in the SE region



Outline TSE corporate planning 2008/9 to 2010/11 'Hosting the World'

- Corporate Planning Options for TSE in '**Hosting the World**'
 - *"A strategic Partnership between SEEDA and TSE to deliver a sustainable visitor economy in the South East for 2012."*
- '**Steady as you go**' options:
 - Option One: £1.9m core funding p.a.
 - Option Two: £2.0m core funding p.a.
 - Option Three: £2.1m core funding p.a.
- '**Investment for 2012**' option:
 - Option Four: £2.5m core funding p.a.
- '**Step Change**' option:
 - Option Five: £5.0m core funding p.a.
- All based on the churn of £200k of current resources to exciting new projects...



Outline TSE corporate planning 2008/9 to 2010/11 'Hosting the World'

- New projects:
 - 2012 Games
 - Centre for Sustainable Tourism
 - Innovation Challenge Fund
 - Bidding Unit
 - '100% Pure Quality' Initiatives
 - Sustainable Community Model
 - Mobile Marketing
 - Waste Oil for Transport
- Good Fit with RES:
 - **Whole RES** e.g. Voice of Tourism, Industry Engagement & Partnership
 - **Global Competitiveness** e.g. Global marketing, Developing ICT Infrastructure
 - **Smart Growth** e.g. Driving Up Skills/Knowledge Transfer
 - **Sustainable Prosperity** e.g. Resort Renaissance, Sustainable Communities

TOURISM IS THE PRINCIPAL BENEFICIARY OF THE OLYMPICS

- Between 50% - 75% net benefit of staging the Games is expected to accrue through tourism
- Potential earnings to the region = £1 billion
- Opportunity to achieve lasting legacy
- Three part plan
 - **On Your Marks...** - strategy work
 - **Get Set...** - action planning
 - **Go!** - progress reporting

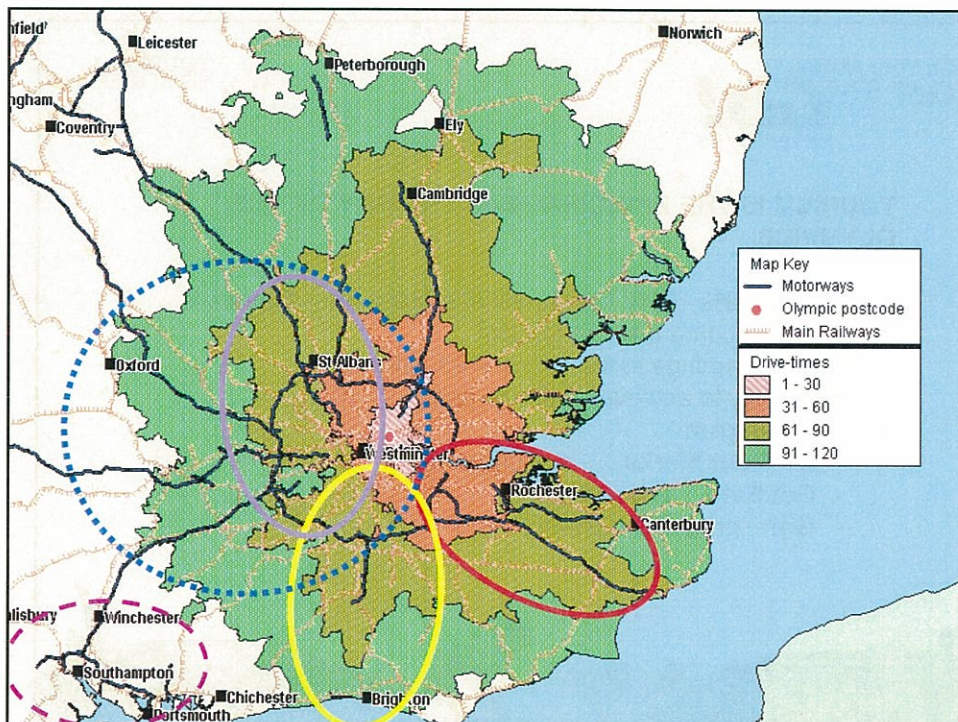


Objectives:

- Optimising **tourism** income
- Optimising **Cultural Olympiad** benefits
- Exploiting **sporting events**, venues and heroes in the SE
- Securing a **skills** legacy
- Securing an enhanced tourism infrastructure and public realm **legacy**

Action Plans:

- VE1** – Regional plans to raise awareness & improve image
- VE2 – VE6** – 5 Action Plans for **Gatwick, Heathrow, Kent, Eton Dorney and Solent Corridors**
- VE7** – Individual Destination Plans
- VE8** – Sporting Events
- VE9** – Customer Care training packages
- VE10** – Transport improvement plans
- VE11** – Accessibility
- VE12** – Sustainability





Centre for Sustainable Tourism

- Rationale
 - Knowledge Capture
 - Knowledge transfer
 - Knowledge Application
 - *to aid businesses in the South East of England, to enhance their competitiveness and derive strong economic returns from pursuing a sustainability agenda.*
- Cross-cutting theme for the RES
- A key forward challenge for the tourism industry
- Complex sector – needs co-ordination
- Business-focused 'centre' needed to realise benefits
- A regional partnership as a repository of shared best practice
- Development of 'points of excellence'
- Application of new technology and approaches

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Skills & Training

- Core TSE role
 - Regional Tourism Skills strategy
 - Tourism Skills network
 - Lead region for the 'Welcome' suite of customer care programmes
 - Train to Gain pilot
 - Hosting the World (Eton Dorney)
 - Fresh Skills for Chefs
- Key Challenges
 - Improving Productivity
 - Skills shortages
 - Skill gaps
 - Investment in the workforce
 - Encouraging Enterprise
 - Innovation
 - Recruitment and retention

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Some 2007/08 Highlights

- Fast help for the challenges of FMD and Floods (with SEEDA support)
- New initiatives for the sustainability agenda
- New funding sources secured for the skills & training activity
- 3000 delegates put through customer care training
- Effective leadership of the Visitor Economy to prepare plans for the 2012 Games
- Revised marketing activity with improved reach and results (Web traffic doubled – year on year)
- Improved leverage of core SEEDA funding
- Step change on Accessibility activity (with SEEDA support)
- Running the UK's biggest travel trade show in London – 'Excursions'
- Commercial membership support – up by 15%

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Issues for Tourism in the South East

REGIONAL

- Differential funding in the English Regions
- Pressure on Local Authorities
- Industry take-up of web trading
- Quality Assurance
- Renaissance and regeneration of the South Coast
- Skills and Training
- Size and Complexity
- Accessing Funding
- 2012 Games
- Sustainability

NATIONAL

- DCMS support for Tourism
- Quality of Research output
- Funding for VisitBritain
- Leadership (Non Marketing)
- Red Tape/Legislation
- 2012 Games
- (£19.3bn) Tourism balance of trade deficit

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