

Appendix to Main Report

Market Analysis of Tourist Accommodation to Inform the Looe Neighbourhood Development Plan

THE LOCAL PERSPECTIVE - PROVIDER INTERVIEWS

18th February 2020

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1 Sector Interviews - Summary

Sample & Overview

- Nine hours of interviews were conducted with six accommodation providers in Looe who had been in operation for between 6.5 years and 20+ years.
- All but one of the providers carried certification and accreditation including AA stars, Quality in Cornwall, Visit England and Visit Cornwall Recognised Inspection Scheme/accommodation charter status.
- Currently 80 – 90% guests are from the UK, mostly from the Midlands, Wales and the North. These are comprised of families, couples, elderly guests (65+).
- Providers had also attracted international guests from Europe (mostly Germany and Netherlands), Australia, New Zealand and USA. (Guests from Germany were reported as attracted to Cornwall due the popularity of author Rosamunde Pilcher.)
- All providers are keen to attract more overseas visitors – having come some distance they are more likely than UK customers to book in advance more likely to stay for longer periods of time.
- Changes in customer base – more UK-born Indian and Pakistani visitors who may have a different range of cultural and religious requirements e.g. swimming pool times for women and children only.
- Brexit uncertainty, a poor exchange rate and two consecutive good weather summers have encouraged more UK staycations – this may be a temporary effect.
- Most providers now open all year and cater for long and short stays. Looe is now seen as an ‘all year round’ destination.
- Staggering of school holidays stretches the season but the Gove effect (families can be fined for taking children out of school out of holiday periods) concentrates family holidays to particular periods that are very busy.
- Guests rather than hosts are dictating the duration of stay, the days of the traditional two-week break in Cornwall are in decline and there are now more frequent short stays.
- Providers unsure as to why there are more short-term stays, ideas include: financial constraints, visitors taking their main holiday elsewhere, Cornwall visits have become an extra, aging population may not want to be away from home for long periods due to ill-health, touring Cornwall but with shorter stays across a range of locations.
- Many more bookings now made at short notice – creates anxiety and uncertainty over not knowing whether or not accommodation will be full and impacts negatively variable costs.
- Decline in the popularity of camping holidays and coaching holidays.
- Eco travel/flight shaming seen as a fad/fashion currently.
- Ancestry travel perceived as having potential.

Marketing

- Print media is dead.
- Almost all bookings are made online.
- Having your own website is no longer enough, providers need a web presence through Booking.com, Expedia etc.
- Referrals are hard to track, repeat bookings are encouraged through offers.
- Between 20% and 50% are repeat bookings.
- Repeat bookings are cheaper than finding new customers or paying booking agency fees.
- Visit Cornwall and Visit England perceived to be less relevant and helpful than Looe Town Council

Emerging trends

- Visitors want more for their money in terms of accommodation, facilities and experiences (e.g. they pay for standard hotel rooms but ask for a room upgrade upon arrival).
- Higher standard and quality accommodation.
- Dog friendly (with extras, e.g. doggy welcome packs/blankets).
- Increased vegetarian/vegan/gluten-free requests.
- Hot tubs expected as the norm.
- Recycling facilities expected.
- A percentage of the customer base is getting older and more disabled/frail.
- Disabled access/provision increasingly required for an aging visitor population.
- Parking on site or very close-by to accommodation/restaurants required.
- Visitors want greater flexibility in booking (e.g. shorter breaks of 1-5 nights).
- More authentic Cornwall experiences (rather than simply sightseeing).
- Increased numbers of visitors coming for day trips/long weekends from Plymouth (only 40 minutes travelling time).
- Campsite bars and onsite facilities are less busy as guests opt for self-catering lodges, they either bring their own food or have the local supermarkets deliver.
- Increased self-catering accommodation (including Airbnb) impacts on use of restaurants and pubs for food as guests opt to eat in.

Tourism in Looe

- Strong and likely to grow.
- More competition due to Airbnb.
- Looe could better exploit what it has to offer.
- Providers describe Looe as “quaint,” “quintessentially Cornish,” “full of olde world charm,” “a magical place that works in our favour,” “rustic, “authentic Cornwall,” as having “great facilities” “it’s got it all” and “in a class of its own.”
- Visitors described as having an emotional and sentimental attachment to Looe.
- Providers compare Looe to Padstow, St Ives and Mevagissey.

Concerns

- Parking.
- Traffic congestion in the town.
- Needs more provision for wet weather activities.
- Park and ride scheme
- Shops to stay open later to create an evening culture

Impact of Airbnb

- More dramatic impact on small/medium sized accommodation providers.
- Some providers going out of business.
- Not a level playing field.
- Lack of inspection certificates (e.g. boilers, electrical appliances)
- No risk assessments
- No safe, legal licencing system
- Lack of safety inspection (e.g. provision of fire extinguishers, fire exits)
- Lack of regulation
- Not paying business rates
- Greatly reduced cost of sales
- Not paying for business rubbish removal
- Fears there will be a serious accident/death at an Airbnb.

Looe Town Council

- Trusted, has a good relationship with providers
- Providers was support in setting up a Looe Tourism Facebook page.
- Looe Town Council to provide strong tourism leadership.
- Encourage shops to stay open until 8/9pm in the evening to provide a more continental feel to Looe for visitors
- Invest in a free or low-cost park and ride scheme/shuttle service to reduce congestion in the town.
- Build a brand for Looe.
- Encourage more out of season visitors.
- Encourage more foreign visitors.
- Introduce Christmas markets.
- Discourage/address 'wild camping.'
- Retain and develop the Looe music festival
- Introduce a booking system on the Town Council's website
- Tackle traffic congestion and parking difficulties
- Build the long-planned outer harbour to support the boat trade
- Relocate the doctor's surgery, police station, car park and petrol station that are on what is considered to be a particularly attractive stretch of the river
- Support idea generation to put on more activities and events for local children and residents using existing facilities at e.g. holiday parks

2 Sector Interviews – Findings in Detail

2.1 Sample

Nine hours of interviews were conducted with the following six accommodation providers in Looe who had been operating for between 6.5 years and 20+ years.

Company name	Accommodation type	Guest Type	Number/type of rooms	Number of years in business
Portbyhan Hotel	Hotel specialising in catering for coach parties	Mainly older 65+ couples and fewer singles	44 double and twin bedrooms	6.5 years under current ownership
Wringworthy Cottages	Self-catering cottages	Couples, families, singles, hen and stag groups	8 cottages totalling 19 bedrooms, can sleep 42 guests	17 years
Calico	Guest House	Couples	Previously 7 en-suite double rooms, downsized last year to 3 self-contained flats and 2 B&B rooms	9 years
Tregoad Park	Holiday Park	Couples and families	Manor House, camping, 11 cottages, lodges, pods	20+ years
Crumplehorn Cottages	Guest House	Couples and families	6 holiday cottages, 2 apartments sleeping up to 25 people	16 years
Tencreek	Holiday Park specialising in the budget holiday market	Couples, families, single people	120 static caravans and 200 tourers	18 years under current ownership

Prior to interview and in order to provide context, interviewees were informed that the Town Council are particularly interested in hearing about the following:

- Any characteristics of new and evolving forms of tourist accommodation, especially the impact of online booking sites like Airbnb.
- The demand of tourism accommodation, from low cost to luxury hotels and the impact on the accommodation sector.
- Changing tourist demographics and needs and customer trends.

Interviewees were given the option for their participation in the survey to be revealed to Looe Town Council and their comments to remain anonymous or be attributed to them.

2.1.1 Certification and Accreditation

All but one of the providers interviewed carried certification and accreditation including AA stars, Quality in Cornwall, Visit England and Visit Cornwall Recognised Inspection Scheme/accommodation charter status.

The provider who did not carry any accreditation or certification was of the opinion that guests are no longer interested in traditional accreditation. Guest reviews and videos and photographs are readily available online and this is how guests come to a decision about whether or not to stay at a particular property:

“Guests aren’t interested in that anymore. We have all the legally required inspections of course but four stars, five stars means absolutely nothing any more. With the internet people can see all the pictures and get reviews anyway.”

Kim Spencer, owner, Wringworthy Cottages

2.1.2 Customer Type

Interviewees were asked about the location their guests had travelled from and reported that between 80 – 90% are from the UK, “all over” but mostly from the Midlands, Wales and the North. Providers had also attracted international guests from Europe (mostly Germany and Netherlands), Australia, New Zealand and USA. Guests from Germany were reported as attracted to Cornwall due the popularity of author Rosamunde Pilcher.

Most providers are keen to attract more international visitors and feel that the combination of Brexit and an attractive exchange rate is likely to encourage more foreign visitors to come to Cornwall. Most are also of the opinion that Brexit uncertainty has encouraged those in the UK to opt for staycations rather than going abroad and hope that having experienced holidaying in Looe, guests will return in subsequent years.

Most providers catered mainly for families and couples and most were dog friendly, including holiday parks. One holiday park owner said they actively discourage large groups of young single men and women because in their experience they are likely to disturb other guests. This was echoed by other participants who commented that Looe is not an appropriate venue for large parties of young people who may be on hen or stag parties and that this was better suited to places like Newquay. Where parties of young people are accepted, they are usually asked to pay a large deposit in advance.

There was one exception who said that the type of people who visit has changed in recent years and that although originally they had set up as a provider to serve family holidays, they had found it necessary to diversify in order to maintain bookings and now offer accommodation to all; singles, couples, families and even hen and stag groups.

“When we first came into business, we were very family orientated, now that’s gone out of the window, completely out of the window. Now we cater for anymore, you have to be open to absolutely everything. We take stag and hen groups, we take parties, we take religious groups, we take couples, we take families. You have to try and diversify your offer as much as you can these days.”

Kim Spencer, owner, Wringworthy Cottages

When questioned about what had brought about this change the provider said it was mainly as a result of two issue that occurred around the same time: the advent of Airbnb and families being fined for taking children out of school out of the school holiday period:

“We were full of families from September half term to the end of October, families with kids being taken out of school. It changed in about 2013 with Michael Gove saying you can’t take children out of school, that’s when it started to bite. And it’s a perfect storm really because that was when Airbnb and booking.com started up, it all kind of coincided at the same time. We lost 60% of our bookings.”

Kim Spencer, owner, Wringworthy Cottages

One provider interviewed said they used to be open for eight months but stay open all year round now and cater for increasing numbers of families with young children in the summer months but have seen an increase in and ‘newly-weds and nearly deads’ across the rest of the year.

2.1.3 Seasonal Variation

Providers say that where their guests come from varies according to the time of year. During the school holidays most visitors are likely to be from between Cornwall and Manchester and several mentioned having many Welsh visitors which they account for as part of the Celtic connection.

It was also noted that staggering of school holidays timing across the UK is enormously beneficial to accommodation providers because it helps spread the season over a longer period, especially at half term.

“It’s organised chaos in the summer, it really helps when the half term holidays are spread out though.”

Henry Joce, joint owner, Tencreek Holiday Park

A number of providers said that the season has changed and some went as far as to say the holiday period is not seasonal any more. Traditionally properties used to close in October and re-open in February in time for Valentine’s Day, now however many are open all year round. Providers described guests visiting for short breaks throughout the year, sometimes more than once and maintained that the days of the traditional two-week break in Cornwall are in decline.

"People come when they want, they come for short breaks or a long weekend. You've got to be open to the whole gambit of things, got to be more flexible, take October half term, you take everything from full week bookings to people taking only a couple of nights, it's just all over the place."

Kim Spencer, owner, Wringworthy Cottages

All providers noted that guests are booking for shorter stays and felt that rather than providers offering stays of a week or two, guests are now taking control over how long they want their stay to last. Providers were unsure as to why they are seeing more short-term stays, some thought it is due to financial constraints or being careful with spending, others felt it might be because visitors are taking their main holiday somewhere other than Cornwall and Cornwall visits have become an extra, or it may be due to the aging population who favour Looe but may not want to be away from home for long periods due to ill-health. One provider suggested that shorter stays may be because visitors are touring Cornwall rather than taking shorter holidays:

"I don't know that it's people coming for shorter breaks or whether they're moving around more, splitting up their holiday, three days with us, three days somewhere else...you know, 'doing Cornwall' or something."

Henry Joce, joint owner, Tencreek Holiday Park

One provider highlighted green issues in this context and said she would not take people for less than a three-day stay because this is more sustainable in terms of the travelling costs of the visitor and cleaning and laundry services for the provider:

"People are coming for shorter stays, that's a huge change but less than three days isn't really sustainable in terms of the petrol visitors are using to get here and the laundry and cleaning we would have to do. You've got to be kind to the planet."

Victoria Richardson, co-owner, Crumplehorn Cottages

Interviewees also noted that many bookings are now made at much shorter notice and this is an ongoing change that presents challenges, not least because it this gives rise to anxiety and uncertainty over not knowing whether or not accommodation will be full. This also impacts negatively on cleaning, laundry and other variable costs.

"We used to be able to look at the books and see July, August and most of September booked well in advance, now it's a case of wait and see. It fills up but it tends to be last minute/late bookings."

Henry Joce, joint owner, Tencreek Holiday Park

Some providers pointed out that Cornwall is 'not as far as people think' and that if this were more widely known it might encourage more visitors to take a short break in Cornwall:

"I hear people saying, 'oh I'm not going all the way down to Cornwall, it's 7 hours from the West Midlands, it's not, it's 3! I don't think this area makes enough of the fact that we're accessible for a weekend break."

Kim Spencer, owner, Wringworthy Cottages

Providers report that although elderly visitors come throughout the year, they tend to avoid the school holiday periods and opt for quieter periods with less crowds. On the other hand, foreign visitors were more likely to visit during the summer months although this was not exclusively the case.

All providers view Looe as an 'all year round' destination and said that now, as in the past, the summer months are very busy, attracting high volumes of visitors but more people are now seeking short breaks across the winter months too and are undeterred by the weather because there is plenty to do in Looe.

"The season has stretched, it's longer, we don't close in the winter anymore. It used to be quiet in the winter but now we can be really busy."

Victoria Richardson, co-owner, Crumplehorn Cottages

Company name	Accommodation type	Percentage of UK customers	Origin of UK customers geographical area	Percentage of International customers	Origin of International customers
Portbyhan Hotel	Hotel for coach parties	95%	Wales, Yorkshire, Midlands	5%	Germany
Wringworthy Cottages	Self-catering cottages	99%	All over the UK	1%	Netherlands, Germany
Calico	Guest House	90 – 95%	Midlands, North, Wales, Scotland	5 – 10%	Australia, New Zealand, USA, Germany
Tregoad Park	Holiday Park	99%	Midlands, North, Wales	1%	Europe (mostly in the summer months)
Crumplehorn Cottages	Guest House	98%	Midlands, North	2%	Germany, Australia
Tencreek	Holiday Park	80%	Midlands, Wales, Devon, Somerset, North as far as Manchester	20%	Netherlands, Germany

2.1.4 Changes in Customer Base

One of the holiday parks noted that there has been a large increase in Dutch and German guests over the last two years and there has been a large increase in the number of UK-born Indian and Pakistani visitors.

All providers had some experience of international guests and were interested in attracting more foreign visitors:

“Cornwall could do more about bringing in foreign visitors to help us keep our head above water.”

Kim Spencer, owner, Wringworthy Cottages

“It’s particularly important for us with the decline in the UK coach holiday market. We want to expand this and we’re looking to 2021 to increase the European incoming market as well as those from America and Australia. The upcoming generation of 65+ are more savvy with the internet and booking their own thing and I think we’re losing some of our market to cruises because they are so cheap.”

Ann Lines, Group and Guest Relations Manager, Portbyan Hotel

Attracting more foreign visitors is viewed as particularly important for coaching hotels because there is a decline in the UK market for this type of holiday. Traditionally this type of holiday has been popular with those aged 65 and over but the upcoming UK generation are looking for something different. It is felt however that coaching holidays still hold appeal for the European market, particularly in Germany for those seeking a literary experience with Rosamunde Pilcher and Daphne du Maurier tours. A further advantage of encouraging foreign travellers is that they are more likely than UK customers to book in advance and, having travelled some distance, are more likely than UK visitors to stay for longer periods of time.

Providers feel that the type of visitors who come to Looe in the age range 40-70years have more disposable income than in previous years and look to spend this on experiences in Cornwall as well as eating out:

“People in their early 40s right up to those in their 70s have more disposable income and we have more upmarket eateries now. We’ve also got a Cornish shop in Looe selling Cornish produce because people want something to take home with them.”

Victoria Richardson, co-owner, Crumplehorn Cottages

Some providers were of the opinion that Looe is likely to need more provision for elderly and disabled visitors in the near future and that this should be encouraged with more information about disabled access in Looe:

“I think we’re going to see more and more elderly and disabled people wanting accommodation, accommodation with no steps and parking like right outside. If we cater for them, we can encourage them to come.”

Kim Spencer, owner, Wringworthy Cottages

Some providers had not noticed any change to the customer base:

"It's the same sort of people coming from the same sort of places, it's the length of stay that's the biggest change."

Victoria Richardson, co-owner, Crumplehorn Cottages

2.2 Emerging Trends

All accommodation providers consider provision to be vital to the local economy in creating year-round jobs not only for those employed in the business itself but for support staff (e.g. maintenance, cleaning) as well as builders, plumbers, electricians and shops and restaurants. The coaching hotel had figures to show that they had increased tourism in Looe by 30%.

All providers told us that there have been a number of emerging trends, many focused on changing customer demands and expectations as follows:

- Visitors want more for their money in terms of accommodation, facilities and experiences (e.g. they pay for standard hotel rooms but ask for a room upgrade upon arrival)
- Higher standard and quality accommodation
- Dog friendly (with extras, e.g. doggy welcome packs/blankets)
- Increased vegetarian/vegan/gluten-free requests
- Hot tubs expected as the norm
- Recycling facilities expected
- A percentage of the customer base is getting older and more disabled/frail
- Disabled access/provision increasingly required for an aging visitor population
- Parking on site or very close-by to accommodation/restaurants
- Visitors want greater flexibility in booking (e.g. shorter breaks of 1-5 nights)
- More authentic Cornwall experiences (rather than simply sightseeing)
- Increased numbers of visitors coming for day trips/long weekends from Plymouth (only 40 minutes travelling time)
- Campsite bars and onsite facilities are less busy as guests opt for self-catering lodges, they either bring their own food or have the local supermarkets deliver
- Increased self-catering accommodation (including Airbnb) impacts on use of restaurants and pubs for food as guests opt to eat in
- Camping is still catered for but is becoming less popular
- Decline in coaching holidays
- More last minute or late bookings
- Increased staycations (possibly due to two good summers and Brexit uncertainty)
- Small increase in foreign visitors
- More UK born Indian and Pakistani visitors who may have different cultural needs

Visitors' expectations and requirements for different types of accommodation have changed; in the case of holiday parks, luxury lodges with hot tubs are more popular than cottages:

“People want more – our cottages can be empty but our lodges with private hot tubs are always fully booked. When people are opting for staycations they want the top end accommodation and good deals on winter breaks.”

Caroline Ellis, Receptionist/Warden, Tregoad Park

This extends to pets too, not only do guests expect accommodation to be dog friendly they also expect extras such as dog blankets, towels and doggy welcome packs with treats and biscuits.

Several interviewees were of the opinion that more could be done to aid recycling. Holiday parks tend to pay private companies to collect their recycling and feel that this should be covered by the rates they pay to the Council. There was also some concern that although providers sorted their recycling into cardboard/plastic/paper etc., when it was collected it all appeared to go into the same container.

Although most providers were aware of trends such as specialised accommodation catering for those with specific dietary requirements most had been addressing this part of the market for some time and noted only that it was on the increase. Although veganism, vegetarianism and gluten intolerance are catered for the general feeling amongst providers was that restaurants could do better and offer a wider selection of foods to suit restricted diets. Many providers also spoke about the popularity of local Cornish produce and took care to provide this for their guests wherever possible.

Providers were aware that the apparent trend for staycations may be temporary and might be a result of two consecutive good summers and/or Brexit uncertainty and a poor exchange rate and a giving rise to reluctance to travel abroad.

Providers were aware of trends for cycle tours, walking holidays and outdoor activities but again, this was not considered new and they were well versed in directing guests to appropriate provision or in the case of holiday parks, providing appropriate equipment and activities.

“We can tell people where to go to do stuff, we know what’s on and we’ve also started selling extras; people want to book an experience more than just a trip. They want authentic Cornwall.”

Henry Joce, joint owner, Ten creek Holiday Park

One provider also mentioned catering for choirs and bowls clubs:

“We do have walking tours where we arrange for luggage to be forwarded to hotels and that sort of thing but we also cater for bowls clubs and sports groups and we cater for choirs which is lovely because they all know each other.”

Ann Lines, Group and Guest Relations Manager, Portbyan Hotel

In terms of other trends such as ancestry travel, environmental travelling, Home-tels and Aparthotels, providers in Looe were aware but had little experience of guests enquiring about this. Possibly this is because Looe tends to attract older, retired visitors and families, hence providers do not perceive these trends to present any barriers, challenges or opportunities at present.

“This eco-travel, it’s a fashion really, you’ve got the same people saying, I really want to save the planet as wanting a hot tub. A hot tub takes gallons and gallons of water and huge amounts of energy to heat it.”

Kim Spencer, owner, Wringworthy Cottages

“We’re budget, it’s a different market from us, the environmental travel thing is for the more affluent with more disposable income. It’s almost a fashion now, we don’t see much of it. We could do it as an add-on, yurts or hobbit homes if it took off.”

Henry Joce, joint owner, Tencreek Holiday Park

Two providers had experience of ancestry travel and felt that this could be developed to attract more guests:

“I’m part of the Polperro Historic Society and people come from all over the world, as far as Australia, Tanzania and Canada. They want to trace their family tree and we can help them with that. I’m going to look into this.”

Victoria Richardson, co-owner, Crumplehorn Cottages

“We’ve had some, I think it will grow, especially the Celtic connection with Wales.”

Ann Lines, Group and Guest Relations Manager, Portbyan Hotel

Accommodation providers believe that green credentials are important and are aware that it is becoming increasingly important to customers. However, some had more difficulty than others in stepping up and described their efforts as more to do with responding to customer requests and expectations than something they had decided to prioritise.

With regard to an increase in more UK-born Indian and Pakistani visitors, providers may need to be aware of different norms and mores arising from cultural differences. For example, Muslim visitors may require women and children only access to the swimming pool at certain times of day.

2.3 Marketing

There have been a number of changes in how accommodation providers market their offerings in the last five years.

2.3.1 Print Media

There is far less use of print media than there was five years ago mainly because customers no longer want brochures or look for advertising in print media. A further problem is that it is difficult to track the level of response from e.g. advertisements in a newspaper/brochure unless an offer code is provided and this creates more work for providers.

“Less and less people look at print these days and it’s really hard to track, people rarely call up asking for a brochure. You have to have an online presence as a service, it’s expected.”

Henry Joce, joint owner, Tencreek Holiday Park

“We don’t go to publications any more, print media is out of the window, nobody wants it. The only time we ever use it is if we’re doing competitions with a code to enter so we get them on our database.”

Kim Spencer, owner, Wringworthy Cottages

“It wouldn’t be worth putting an advert in the paper these days or even in the Looe brochure, you’d get nothing back. It’s all online now.”

Victoria Richardson, co-owner, Crumplehorn Cottages

An exception to this trend is coach operators and coaching holidays who advertise mainly in the trade press e.g. Coach and Bus weekly and at trade fairs e.g. the British Travel and Tourism Show held at the NEC in Birmingham.

2.3.2 Online sites

Having an online presence is viewed as vital to business by all providers and it also makes tracking response to marketing spend much easier, all providers have their own web sites and those who use e.g. Booking.com and Expedia track their spend and return on investment carefully.

“We know to the penny where our marketing spend goes. We know what our market is and we target it carefully.”

Henry Joce, joint owner, Tencreek Holiday Park

Interviewees said that almost all their bookings are now online. Most widely used booking sites are:

- Hoseasons
- Expedia
- Booking.com
- Airbnb
- Owners Direct
- Cottages.com

Most providers felt that online booking sites are ‘a necessary evil’ to ensure bookings but described them as expensive and many felt the burden of the financial hit on their profits.

“Organisations like Booking.com charge a percentage but we don’t pass that on, or change our prices, we have to swallow that, it’s a big cost to us.”

Henry Joce, joint owner, Tencreek Holiday Park

Some providers had sought niche holiday websites to advertise their accommodation and increase their customer base:

“I’m on quite a few websites, most of them are niche, things like ‘Group accommodation,’ ‘Dogs Welcome,’ ‘Away with the kids.’ that kind of thing.”

Kim Spencer, owner, Wringworthy Cottages

Providers noted that it is more difficult to sustain a robust online presence as a result of the rise in online booking sites. Having your own website for your property is no longer enough:

“It’s getting harder and harder to have an online presence, something that people will notice and respond to; it’s things like Booking.com and Airbnb, that’s where people will look and you have to make sure you’re on there. Places like Trip Advisor have heavy fees so that’s another issue.”

Victoria Richardson, co-owner, Crumplehorn Cottages

2.3.3 Referrals

Providers said that they do get a number of referrals from previous guests but these are difficult to track. If a potential guest calls to make a booking, on occasion they will volunteer this information but if not, they are asked if they have been referred by someone else or sometimes referrals become evident in the course of a guest’s stay:

“About 5% of our guests are from referrals, we see them at check in and we talk to them during the stay so often it’s kind of something that falls out of a conversation that you’re having with them.”

Kim Spencer, owner, Wringworthy Cottages

“A lot of our guests are from referrals; we ask people if they’ve been referred and we cultivate that.”

Victoria Richardson, co-owner, Crumplehorn Cottages

Again, an exception to this is coaching holidays where referrals come from coach drivers who get feedback and share experiences with other coach drivers.

2.3.4 Repeat Bookings

All providers reported high numbers of repeat bookings over the course of many years, this is viewed as a signal of success and all providers are keen to increase repeat bookings. One interviewee said that one couple had been returning to their family business for seventy years.

Providers said that between 20% and 50% of their guests are repeat bookings and some offer discounts for repeats because this is preferable to paying booking agency fees.

“It’s a cheaper alternative to finding new customers and better than paying Booking.com.”

Henry Joce, joint owner, Tencreek Holiday Park

“I’m not sure how many referrals we get because they are harder to track but we get about 20% of our guests through repeat bookings.”

Caroline Ellis, Receptionist/Warden, Tregoad Park

“We get between 20 and 25% repeat bookings, you do anything to encourage repeat bookings. Anyone booking for 2021 who is coming in 2020 would get their holiday at 2020 prices if they book now, we’ve always used that approach.”

Kim Spencer, owner, Wringworthy Cottages

“We get lots of repeat bookings, I’d say about 30%, people like it here and they like Looe. We offer special ‘returners breaks’ so people actually want to hear from you to see what you’ve got on offer.”

Victoria Richardson, co-owner, Crumplehorn Cottages

The provider above also made the point that guests now like to feel that they have a personal relationship with their accommodation provider, rather than the more formal business relationship of days gone by:

“It’s a big change, you can’t be remote from your guests any more, they want to feel that they know you and that you know them. The formality has gone.”

Victoria Richardson, co-owner, Crumplehorn Cottages

The importance of building more personal relationships with guests is unlikely to be confined to smaller guest houses and may have appeal for all but it is more difficult to establish in holiday parks where so many more guests need to be catered for.

The coaching hotel made a point of greeting and saying goodbye to each coach party and reported a high number of repeat bookings with many visitors returning again and again, often more than once a year:

“If they come back, we know we are doing something right. We always see a familiar face on every coach, there are always two or three and they keep coming back.”
Ann Lines, Group and Guest Relations Manager, Portbyan Hotel

2.4 Tourism in Looe

Most accommodation providers feel that tourism in Looe is strong and likely to grow.

"It's always busy, especially in the summer, we get a lot of older people who enjoy Looe, that's definitely increased."

Caroline Ellis, Receptionist/Warden, Tregoad Park

It was noted by several participants that there is more competition now due to the ease and use of online booking and the impact of Airbnb.

"People will book with Expedia for example and they have everything. We're competing with the whole spectrum now, not just other holiday parks."

Henry Joce, joint owner, Tencreek Holiday Park

Others felt that Looe is not making the best that it could of what it has to offer and that this is ripe for exploitation to a more beneficial degree. It was suggested that there should be a Looe Facebook page that could be run by volunteers who have businesses in the area who could use it to advertise free of charge and drive trade. It was felt that this could also facilitate businesses talking to each other so that, in quiet periods for example, restaurants could open in rotation rather than spread the few available customers across a range of venues.

"We need to promote ourselves more, we could go more upmarket, we've got so much to offer, our blue flag beach, the conservation area, the countryside."

Victoria Richardson, co-owner, Crumplehorn Cottages

"I think it's got huge potential but isn't being expressed. I think the lack of a sort of centralised place for people, both in terms of a proper website, or even a Facebook page causes us to lose visitors."

Kim Spencer, owner, Wringworthy Cottages

Most providers shared the opinion that once guests had visited Looe, they were likely to return but the main difficulty providers encounter is in getting new guests to Looe in the first place.

"They sort of fall in love with it once they come and they want to come back. It's about getting them there in the first place, telling them there's all these different opportunities, and things nearby as well. It's a good starting point for lots of different experiences."

Kim Spencer, owner, Wringworthy Cottages

2.4.1 Destination Looe

Looe was invariably described by interviewees as: "quaint," "quintessentially Cornish," "full of olde worlde charm," "a magical place that works in our favour,"

“rustic, “authentic Cornwall,” as having “great facilities” “it’s got it all” and “in a class of its own.”

Providers were very enthusiastic about Looe, all mentioned the blue flag beach and the many activities on offer such as fishing trips and visits to Looe island and described it as both family and dog friendly:

“Looe is lovely! Not that I’m biased! Looe is quiet and cute and it’s got class. It’s got nice restaurants and pubs, it’s not tacky, it’s got the fishing and it’s quaint, we need to preserve this.”

Caroline Ellis, Receptionist/Warden, Tregoad Park

“Looe’s got a really unique character; it’s a good little seaside town with some excellent facilities and a nice beach and it’s dog friendly. It’s a good base for exploring. It just doesn’t make enough of itself really.”

Kim Spencer, owner, Wringworthy Cottages

Many felt that Looe has a unique quality that brings visitors back again and again and for these reasons, providers were very keen that Looe should preserve what visitors and residents alike appreciate about the town. There was some concern that in an effort to increase the number of visitors, not all might appreciate the quaintness of Looe:

“Big caravan sites are doing very cheap breaks and that may bring different sorts of visitors but we are a really quaint town and we need to keep our quaintness and attract people who respect that.”

Victoria Richardson, co-owner, Crumplehorn Cottages

The majority of accommodation providers described visitors as having an emotional and sentimental attachment to Looe:

“The whole sentimental attachment to Looe for visitors is big. They came here as children on family holidays and they come back with their children so they can share that. It’s what memories are made of, the angling, the safe family beach with a blue flag again now, the town has kept its character and it’s what people love.”

Victoria Richardson, co-owner, Crumplehorn Cottages

“Cornwall is a ‘go to’ place, everyone wants to say they’ve been to Cornwall, it’s a reminiscing place, often they came here as children.”

Ann Lines, Group and Guest Relations Manager, Portbyan Hotel

However, others felt that visitors’ decisions to visit were more likely to stem from a ‘let’s go to Cornwall’ mentality rather than a desire to visit Looe specifically.

"I'm not sure if visitors are deciding to come to Looe especially or whether it's that they decide they want to go to Cornwall and coming here is almost incidental."
Henry Joce, joint owner, Tencreek Holiday Park

In comparison with other similar places providers mentioned Padstow, St Ives and Mevagissey but noted that each has its own unique attributes and did not feel that there was anything in particular that Looe could learn from or emulate in making such comparisons:

"We're similar to Padstow though of course, they have Rick Stein but Looe is more up and coming now and we've got more culinary appeal than before. People are coming with more disposable income and some of them want to eat out all week."
Victoria Richardson, co-owner, Crumplehorn Cottages

"We like Looe as it is and so do our visitors, we don't want to be like somewhere else, Looe is unique, we need to keep it like it is, stay traditional and calm."
Ann Lines, Group and Guest Relations Manager, Portbyan Hotel

There was one exception to this from a provider who noted that St Ives has an excellent web site that Looe could learn from and suggested that a Looe tourism working party should be set up by accommodation providers and local businesses.

However, when asked what they would not like to see in Looe providers were unanimous that it should not become like Newquay, no 'kiss-me-quick' hats or 'tackiness' or as a venue for hen and stag parties. All providers felt that large groups of youngsters should be discouraged because Looe caters primarily for couples, families and retirees. Providers also noted that Looe should not become like Polperro which they feel has suffered irreparably due to Airbnb provision:

"I worry about the huge number of Airbnb properties and I don't want us to become like Polperro. I don't think we'll see the effect for a few years but it's going that way. It's dead there in the winter now, no pubs, shops, restaurants, they're all closed for the winter. The local people will turn around and say, 'blimey where are all the visitors?' When all the pubs and restaurants disappear, and all the post offices and shops, because they can't make any money, then they'll say, 'Oh it's not nice living here anymore, there's no heart and no life left, let's move on.'"
Kim Spencer, owner, Wringworthy Cottages

Providers were also concerned about traffic congestion in the town and lack of parking and described elderly people in particular driving around and around looking for somewhere to park close to the amenities they wish to visit. This was noted by almost all interviewees and gave rise to suggestions for a free or subsidised park and ride scheme and one provider suggested introducing a tram service.

Looe was described as having few weaknesses other than traffic congestion and parking problems but providers said they would like to see more provision for wet

weather conditions, particularly in the summer. Holiday Parks are making efforts to provide facilities and activities for families on rainy days and would welcome day visitors but providers said they would also like to see an all-weather play area built outside of town.

2.5 Impact of Airbnb

Providers said one of the most dramatic and for some, devastating change in Looe has been the rise of Airbnb, now the fastest growing holiday website. The rise in popularity of Airbnb has impacted smaller and medium sized businesses more than the larger holiday parks:

“Airbnb has had a massive impact on our business. We advertise on there now, we have to. They don't do any of the things that I have to do which cost me money like fire risk assessments, play safety stuff. They don't do any of that and consequently, I'm spending money and they're not, I pay 20% business rates, they don't.”

Kim Spencer, owner, Wringworthy Cottages

“It hasn't really had much of an effect on us because we are a holiday park and we're offering a whole experience, it's different for B&B people and the guest houses.”

Caroline Ellis, Receptionist/Warden, Tregoad Park

Although the advent of Airbnb has caused a great deal of consternation in Looe amongst smaller accommodation providers in particular, others could see its advantages:

“I love Airbnb, I think it's biggest selling point is that you get to stay somewhere you would never have stayed in the past or even had access to.”

Henry Joce, joint owner, Tencreek Holiday Park

“It's helpful for tourism, you need an open market for everyone. It gives tourists more choice. Anything that brings more people in is a good thing, it's bringing people in who couldn't afford a hotel.”

Caroline Ellis, Receptionist/Warden, Tregoad Park

Some providers thought that Airbnb provision might account for the trend in taking shorter breaks and bookings being made at shorter notice but for most, the impact on the price guests are prepared to pay for their holiday accommodation was of most concern:

“Before Airbnb we would be booked up for the summer, now there are many weeks available. More people are driving us down to the lowest price, it's detrimental to accommodation prices across Looe.”

Victoria Richardson, co-owner, Crumplehorn Cottages

Participants also fear that Airbnb is likely to impact standards. Although, like all accommodation on offer, some will be better than others, standards are likely to go down because they are not inspected or expected to be of a recognised standard. Providers feel that over time, this is likely to reflect negatively on Looe and accommodation offerings more generally in the town.

Airbnb in Looe is viewed as having created greater competition in the accommodation business and whilst competition per se is not seen as a bad thing, Airbnb provision is viewed as creating an uneven field of operation that is causing some longstanding providers to go out of business.

"We've got to sell, I've been trying for 15 months and but there's no one buying. I know of at least 20 other properties, very similar to me who are doing exactly the same thing. And it's really down to the lack of a level playing field. It's a perfect storm that's caused by Airbnb. It's the cost of getting your property to a decent standard, paying for all the risk assessments etc., £27k a year in business rates ...when Airbnb places aren't doing it. We are too small to get the kind of discounts that the really big boys and the caravan parks get but we're too big to avoid paying all of the taxes. These people are making a lot of money. Even students in Falmouth are letting their student accommodation in the summer."

Kim Spencer, owner, Wringworthy Cottages

"Smaller guest houses are closing down, they can't compete, you have to do more and more to get the bookings. Guest houses are closing down and becoming private houses."

Victoria Richardson, co-owner, Crumplehorn Cottages

To compound the problem, providers also noticed that some vacant properties in Looe were being bought up and offered as Airbnb accommodation but were paying neither business rates or Council Tax because they are registered as second homes, let for a number of days a year. The result of this is that these properties can be rented at a reduced rate, undercutting registered accommodation providers whilst still providing a profit for the owner. This becomes a vicious circle as smaller guest houses of e.g. 6 bedrooms fail and are then bought up to become Airbnb properties.

"They're actually operating as a business, but they're not paying rates and no Council Tax. I read somewhere that there's 44,000 properties doing that. That's a lot of money the Councils across the country are losing. We are the most affected by this and we need to lobby central government to change it."

Kim Spencer, owner, Wringworthy Cottages

Most unease regarding Airbnb provision centres on perceived unfairness of the system and the demands that other accommodation providers are required to comply with that do not apply to Airbnb providers.

"My main worry for my businesses is unregulated Airbnb, we can't compete with that, we pay for complying with various rules and regulations, business rates, rubbish disposal, it all costs money that I have to pay out and they don't."

Victoria Richardson, co-owner, Crumplehorn Cottages

Most often cited grievances with Airbnb concern the following:

- Lack of inspection certificates (e.g. boilers, electrical appliances)
- No risk assessments
- No safe, legal licencing system
- Lack of safety inspection (e.g. provision of fire extinguishers, fire exits)
- Lack of regulation
- Not paying business rates
- Greatly reduced cost of sales
- Not paying for business rubbish removal

In terms of the impact of Airbnb on Looe in particular, some accommodation providers believe that this has led to the demise of a number of smaller guest houses that have now become private residencies, others took a more sanguine view:

“You can’t beat them {Airbnb}, so you join them, don’t you? It’s definitely created more competition, not that that’s a bad thing, but it’s not a level playing field. Where smaller places are concerned, people need to wake up and join in, go on Airbnb.”
Henry Joce, joint owner, Tencreek Holiday Park

Taking the view that Airbnb is here to stay, a number of providers have already opted for listing their accommodation on Airbnb or are thinking of doing so shortly.

Providers are of the opinion that the impact of Airbnb in Looe is reflected all over Cornwall and elsewhere. It is considered to have dramatically increased competition but most feel it is operating from an unfair position.

“Airbnb is attracting different sorts of people who wouldn’t come usually and that can be a good thing or a bad thing but one thing for sure is that we need legislation and it needs to be enforced with proper risk assessments and insurance and that sort of thing.”

Victoria Richardson, co-owner, Crumplehorn Cottages

Many providers fear that at some point there will be a serious accident or even a death at an Airbnb and that this should be pre-empted before the event rather than after a tragedy, and that this requires a change in the law. In particular providers feel that there should be more regulation of Airbnb provision, that this needs to happen soon and needs to come from central government to ensure that it is adhered to by all.

2.6 Support for Market Development

Providers were aware that support for market development was available but although some had approached Looe Town Council and had built a good relationship, few had approached Visit Cornwall or Visit England, many chose instead to undertake market development for themselves:

"I do a huge amount of marketing that's my job 24/7. I've got a degree in Management Studies I know all about the marketing mix, I have to get it right and I know how to do it."

Kim Spencer, owner, Wringworthy Cottages

2.6.1 Looe Town Council

Interviewees feel they are supported by and have a good relationship with Looe Town Council. Not all initiatives have been successful but accommodation providers showed great willingness and trust in the Council and have a number of suggestions for how they might work together. For example, it was noted that several years ago funds had been spent on a tourism in Looe website that had been unsuccessful because its purpose was not well understood. In the course of interviews providers volunteered to work with the Council to build a Looe Facebook page that could benefit accommodation providers and local businesses alike.

Provider's suggestions for support they would like to see:

- Support in setting up a Looe Tourism Facebook page with the Town Council acting as facilitators for businesses and accommodation providers
- Looe Town Council to provide strong tourism leadership
- Encourage shops to stay open until 8/9pm in the evening to provide a more continental feel to Looe for visitors
- Invest in a free or low-cost park and ride scheme/shuttle service to reduce congestion in the town
- Build a brand for Looe
- Encourage more out of season visitors
- Encourage more foreign visitors
- Introduce Christmas markets
- Discourage/address 'wild camping'

"Make it like the ones they have in Germany, Looe is really pretty at Christmas."

Henry Joce, joint owner, Ten creek Holiday Park

"If we had a proper Christmas market with quality crafts and food, we could market that to coach parties. We need more things that suit the ambiance of the town."

Ann Lines, Group and Guest Relations Manager, Portbyan Hotel

- Retain and develop the Looe music festival

- Introduce a booking system on the Town Council's website

"They had one but it didn't work very well. Ours works really well and I'd be happy to offer my assistance to the Town Council, ours could roll out to the whole town."

Henry Joce, joint owner, Tencreek Holiday Park

- Tackle traffic congestion and parking difficulties
- Build the long-planned outer harbour to support the boat trade
- Relocate the doctor's surgery, police station, car park and petrol station that are on what is considered to be a particularly attractive stretch of the river

"All our services like the doctor's, the police station, the car park, are on the best part of the river, they need to relocate, it's a waste. We'd be better served with bars and restaurants along there; visitors would love it."

Henry Joce, joint owner, Tencreek Holiday Park

- Support idea generation to put on more activities and events for local children and residents using existing facilities at e.g. holiday parks

2.6.2 Visit Cornwall

Few interviewees had used Visit Cornwall for marketing support but as one provider pointed out, this is because they had not approached them:

"We've not had any direct support from them but we're not great at asking, they seem very good at some stuff they do."

Henry Joce, joint owner, Tencreek Holiday Park

One provider felt that Visit Cornwall are more interested in other areas of Cornwall than Looe:

"It's a waste of time to be honest with you, they're not interested in Looe."

Kim Spencer, owner, Wringworthy Cottages

Provider's suggestions for support they would like to see:

- Provide advice on how to deal with Airbnb in creating a level playing field.

"The number of Airbnb properties in Looe probably equates to a holiday park. We can't beat them on price so it's not fair and needs to be addressed."

Henry Joce, joint owner, Tencreek Holiday Park

"I'd like to see them do more about Airbnb, make sure it's regulated and inspected and check that they are paying rates and for refuse collection. Weed out the dangerous properties and make sure they all have proof of insurance and public liability."

Victoria Richardson, co-owner, Crumplehorn Cottages

- Encourage more visitors to come to Looe.
- A more interactive website
- Provide advice about attracting more European visitors

2.6.3 Visit England

Providers consider Visit England to be city-centric and less interested in more rural destinations, hence interviews did not consider this to be a valuable resource for Looe:

“They’re not relevant to us. I don’t get what they do really.”

Henry Joce, joint owner, Tencreek Holiday Park

“It costs money to join and I don’t know that anybody {guests} take any notice.”

Kim Spencer, owner, Wringworthy Cottages

Provider’s suggestions for support they would like to see:

- Concentrate more on Cornwall rather than London and Bath to increase visitors to Cornwall
- Act as an agent, advertise Looe and push business to accommodation providers
- Provide a booking system and promote Looe
- Offer constructive support in how to attract more overseas visitors

2.7 Concerns impacting on tourism

Accommodation providers raised a number of concerns they believe are impacting on tourism in Looe and a number of changes they would like to see.

2.7.1 Road conditions and public transport

Interviewees cited transport difficulties and congestion in Looe's town centre as major areas of concern. Buses and delivery vehicles find it difficult to move through the town during the summer months due to congestion and illegal parking.

Public transport was noted as being both in short supply and problematic in Cornwall generally and the poor condition of many roads in Cornwall was also a source of concern.

"Once you get past Plymouth the roads are awful and there's no public transport, what we really need is to expand the M5 to Looe!"

Henry Joce, joint owner, Tencreek Holiday Park

"Our infrastructure lets us down, the buses and rail, that could be a barrier to people coming to Looe or coming to Cornwall generally."

Victoria Richardson, co-owner, Crumplehorn Cottages

It was felt by many that if access via train or bus/coach could be made easier this would enable Looe to promote itself as an environmentally friendly destination and attract a more eco-minded clientele:

"We only get two or three guests a year coming by train or bus, it would be good if we could increase that."

Victoria Richardson, co-owner, Crumplehorn Cottages

2.7.2 More activity in the evening

Providers feel strongly that Looe could benefit from longer opening hours for shops in the evening to give visitors more opportunities to browse and create more of a café culture for the town in the evenings, especially in the summer.

"We could be busier in the town in the evening to attract more people instead of them having to go back to camp sites or wherever for entertainment."

Ann Lines, Group and Guest Relations Manager, Portbyan Hotel

"We have plenty of entertainment on the site but it would be nice to have more to do in the evening in the town, create more of a continental feel."

Henry Joce, joint owner, Tencreek Holiday Park

Some participants noted that in the past the town had been more lively in the evenings but that now, shops close in the evenings and many are also closed on Mondays, even in summer.

2.7.3 Revision of parking restrictions

Providers feel that parking restrictions are appropriate in the summer months but would like to see them relaxed for the winter months. If free parking was provided in the winter it is felt that this would encourage first-time day trippers who might then return in the summer. It was also suggested that free parking for coaches in the winter would be appreciated and would serve to increase winter trade.

2.7.4 Strains on infrastructure

In the summer months Looe is very busy and this can put a good deal of strain on the local infrastructure, not only in terms of traffic congestion but also on local shops and visitors use of amenities such as the doctor's surgery. Supermarkets are out of town and small local food shops often find it difficult to keep up with demand resulting in empty shelves.

2.7.5 'Wild camping'

Some providers were concerned about a trend for 'wild camping; (i.e. not on designated sites) in the height of the summer. This largely concerns, but is not confined to, an area in Hannafore where camping vans regularly pitch up on an area of free parking that provides beautiful sea views and effectively, they camp for free. Providers said that waste water from camper vans indulging in such activity is often disposed of on grass areas where other guests might like to picnic, overlooking the beach and makes it difficult to maintain the standards that paying guests expect. One provider stated that this area is even advertised on a wild camping website but feels that little has been done by the Town Council to curtail such behaviour.

2.7.6 Need for an outer harbour

A number of participants spoke about plans to build an outer harbour that had not yet come to fruition. All were enthusiastic about this venture and talked about how it would bring in and serve the yachting/boating fraternity providing them with an opportunity to come ashore and avail themselves of all that Looe has to offer. Providers felt that this would help to give Looe a stronger identity and would attract an additional clientele with more spending power who might also be likely to visit outside of the traditional holiday period. Providers were disappointed that plans for an outer harbour appear to have been shelved for the time being and feel that it could give Looe a new lease of life.

2.7.7 Extend the sea defence wall to the harbour

Providers would like to see the development of an evening culture in Looe and noted that there is a gap between the sea defence wall and the harbour that if joined, could provide excellent promenading opportunities in the early evening. Combined with shops staying open later providers feel that this would be a welcome contribution to the development of evening activities.

2.8 Business Outlook

Providers talked about how difficult the accommodation market has become for small and medium sized businesses. As a result, one had decided to sell and one had downsized:

“Ideally, I’d like to sell Wringworthy as a going concern. I would love a young couple like we were when we took it on, to buy it and have as much fun with it as we’ve had but realistically, I don’t know if that will happen.”

Kim Spencer, owner, Wringworthy Cottages

The table below shows the accommodation providers interviewed plans for the immediate future over the next twelve months and their longer-term plans for the next three to five years,

Company name	Accommodation type	Plans for the next 12 months	Plans for the next 3-5 years
Portbyhan Hotel	Hotel specialising in catering for coach parties	REDACTED	REDACTED
Wringworthy Cottages	Self-catering cottages	Sell the business, hopefully as a going concern.	Stay in the area, provide 1-1 business support to those in the tourism sector as a volunteer
Calico	Guest House	Invite regular guests to try out new apartments. Make any appropriate changes.	Continue to look at changes that can improve the guest experience.
Tregoad Park	Holiday Park	Phasing out camping as it is becoming less popular. Setting up Airbnb pods. Prepare to be even busier. Install more dog bins and improve facilities for recycling.	Increase the number of luxury lodges with private hot tubs. Continuous upgrading and providing the best experience.
Crumplehorn Cottages	Guest House	Be more flexible with short breaks. Do change-overs for themselves to offset costs. Planning to down-size a little. Investigate potential for ancestry holidays	Increase down-sizing and close/sell two cottages.
Tencreek	Holiday Park specialising in the budget holiday market	Possibly adding hot tubs but costs are prohibitive. Adding extras providing experiences rather than trips to see something. Extend the hire fleet of static caravans. Build a children’s soft play area. Encourage and be more open to locals using the facilities.	Support the Forest for Cornwall initiative by planting a tree for every booking. Build the new customer base. Increase repeat bookings.

3 CoaST Interview

Defining Eco tourism

We need to be rethinking the frame on this for two reasons: eco-tourism is to do with flora and fauna watching, it's not the same as low impact and sustainable tourism. You could go out in a boat and go and see a whale, but cause devastation with the boat, and that would still be called eco-tourism. Somebody who walks down to the beach, didn't throw rubbish on it and just enjoyed the place in such a way that they only left footprints, and they were staying at green accommodation, provided with local foods and travelled by cycle, that would be sustainable tourism. It's important to define what we mean to begin with.

What must accommodation providers be aware of?

The big point is the issue of the climate emergency and the ecological collapse issue. People aren't aware enough of that but there is an increasing understanding that we need to become more aware.

What will happen in terms of climate breakdown and ecological collapse will have an impact on the tourism sector and the visitor economy as a whole. We are talking about the infrastructure, transport routes, interruptions to harvest, changes in energy supply, impact on water supplies and we've seen some extreme weather just over the last 18 months. That will all have an impact on how the tourism industry operates. It will have an impact on the landscape, particularly in the southwest, that we rely on so enormously to draw people to come here. It will have a physical impact, in a very visceral way.

The other side of it is that there is a growing awareness, again, not enough, but there is definitely a growing awareness amongst a number of tourism providers who've been looking at how they can operate sustainably. They are really thinking very carefully about what their role is as a business in a local community and their impact on the social, economic, and environmental fabric of their community.

Has CoaST noticed a change in narrative, enquiries etc?

The CoaST network is full of very progressive minded businesses, the most progressive are moving into the notion of the climate emergency. I'm having a number of conversations with tourism businesses to find a way of articulating the impact of the climate emergency with a visitor charter we developed two years ago. It is a very simple, five-point tool for businesses to engage with their visitors on things like energy, transport, local procurement and enjoying the local culture in ways in which could be positive for tourism. If you're a service accommodation you're not doing the laundry every single day unnecessarily. If somebody's staying for three days, they can use the same towels and same sheets.

We're really breaking the mould and saying to change the way we're doing things quite dramatically. Some businesses are reconfiguring how they operate their business in to take account of climate issues. It's no longer business as usual.

Opportunities for Looe

We can't be looking at what's referred to as volume, as value. It's not about getting as many tourists in or making as much money as possible. It's about understanding that that is not the sort of tourism that we're encouraging. It's also about social equity and making sure that what we provide is low impact, possibly high quality, but it means that we think about building an eco-lodge.

Start by understanding that tourism should always be for a place, and it should contribute to that place rather than the place being there for tourism. There should also be the notion of social equity, and that also applies to our visitors, so that what we're promoting isn't unwittingly excluding those who can't afford top-end niche, allegedly green and eco holidays and enjoying ways of having a low impact holiday. The best ones are where you actually sleep in a field.

People are looking for more eco-friendly tourism destinations probably for the last 10 years. A rule of thumb would be that 25% of people really get this, and are looking for it. But there's a big chunk in the middle who haven't thought about it but often come away thinking it's really cool, so as long as you make sure that you have a quality experience. That experience could be anything: a fantastic conversation with somebody who knows their place really well and shows you where you can get a fantastic local pint, a fantastic local fish soup or a fantastic walk. That actually costs very little, but it has a huge benefit to the visitor and a very low environmental impact. It also has a beneficial social and environmental impact on the local community, so depends what you mean by quality. Quality has lots to do with authenticity and connection, well-being and often it's found in a sensory experience, standing on a cliff top, a fantastic meal, a mug of tea at a local beach café. These things will be the highlight of many people's holiday. As long as it's local, and you're talking about local businesses and local foods, that might be slow food, you're going to be having a positive impact on the world.

It's mostly women who book the family holiday and mostly the people who tend to be receptive to this sort of messaging are women. If you're a tourism business you need to talk about what it is you're trying to do and understand it, then people who are booking that holiday will be receptive to it. Some businesses will be overt about their green credentials but with others will be very quiet. When visitors are there, they'll say of course we manage our waste, of course we have rainwater harvesting, of course we're really careful about where we buy things, of course we train our staff really well and we make sure that they can manage the hours to fit their family commitments. This is part of social, environmental and economic sustainability. You have to think about how you want to articulate it in a conversation with visitors that invites them into that space to say how can we work together.

The aim should be to ensure that guests have an amazing time and contribute positively to a place so that they might want to come back. That is the best sort of tourism for Cornwall. Getting more and more visitors in who leave litter everywhere and just give us lots of money is prostitution of a place that's not tourism. Rather than give them a hard time for doing that offer them an amazing experience, come down on the train, hire an electric car, use a bike, go for a walk, tell them about amazing cultural experiences they can be involved in while they're here. Otherwise we are literally burning the boat.

Waste/recycling

I came into tourism through waste, I was working in waste management and recycling in Bristol 20 years ago. It's never as good as it could be, but it's much better than it was. In terms of businesses, there are many ways that visitors can behave that contribute, like using public transport instead of a car. It's much easier for the tourism business owner to find out, than it is for the visitor and that's something they should have in their information packs. There's lots of local cultural events that they can be encourage to go and see, lots of car free activities. They can look at the archaeology, the heritage, the natural history, the social and cultural history of a local area. It's about going to small local shops and selling local food and local locally made goods and encouraging people to think about these things when they're on holiday. There's information on our website about how you can frame it as a business for your visitors. You're just saying this is how you can help us keep it fabulous. It also means they might just change their behaviour slightly when they're in that place, and in such a way that it helps the place. It's never one thing in isolation, it's how they all contribute.

Airbnb

If it's properly done by local people taking control of their own destiny it can work well but it's understanding that you need to do it collectively as a place, and decide what you think your carrying capacity is. It's not Airbnb if it's moving into somebody else's home that's basically a business trying to pretend it's not a business. It's understanding how to use the tool.

4 Visit Cornwall Interview

Figures on serviced vs non-serviced accommodation for Cornwall

There are no accurate figures available. We know the volumes but the best we have are assumptions and those assumptions were made some years ago, we do not know if they are still valid.

We need an industry that's data driven and intelligence led but we haven't got that, so we don't actually have any figures on serviced versus non serviced accommodation.

There is a breakdown for Looe (contact Malcolm for more details) he did not have access to the figures at the time of interview), and the area around Looe for 2018. This is about the best that is available and Airbnb information has been factored in.

Value, average spend per night

As above, there may be some data available but Malcolm did not have it to hand, it is possibly more of a guesstimate than hard facts but there is data available for Cornwall more generally than Looe specifically. The figures are recorded as part of Caradon District Area which would provide an idea of how much tourism there was.

What visitors want

It's a race for quality, going up the chain, high end lodges, hot tubs. There are campaigns to develop businesses and it's all about providing better quality. The problem with hot tubs is that the regulations mean that they have to be emptied after they're used and that's expensive and it's not very green. It's OK if you have a full week's let but for two or three nights it's a lot of water and they are expensive to heat too.

People want more short breaks and they do extend the season. That doesn't mean you get away with less though, not less quality, less facilities.

Which other resorts does Looe compare with?

Charleston, Mevagissey, Porthleven, Dawlish, Padstow to some extent. Is it used to be called tourism, but in reality, it's the experience economy now because people can see places online and they can look at videos, this is all new and it's changing tourism. It's all about developing unique, personal experiences, and how you sell those.

Changing tourist demands

People want authentic quality Cornish experiences these days, not just sightseeing. Looe has got some good options, Looe island and fishing for example, it wouldn't be

too difficult to find a Looe fisherman to take people out on a boat and explain the fishing industry in Looe, and it doesn't have to be expensive. It's why the cookery schools work elsewhere, like Padstow. People want new experiences.

Experiential Looe

The food is quite good in Looe, we're trying to get that across. We need to get people talking about it and tell other people. Whatever we are offering, whatever experiences we offer, we need to make it easy for people. We need to sell good experiences. It would be useful to get some mystery shoppers to go and try things out in different segments and ask them what they really think about their experiences in Looe. It would be a really valuable thing to do and it would probably knock a bit of complacency out of people and you could see what has to change. A lot of the people we talk to are willing to change.

Changes in the tourism market

The market is changing and it's changing quite dramatically in the next 10 years. For instance it will be things like accessibility and whether places are dementia friendly, mental health issues, that kind of thing. That is where the new hygiene factors exist. It's very different from 20 years ago. That and green issues, the question that's going to be asked is 'Why haven't you got a green policy? Why haven't you got better disabled facilities?'

Looe has had its problems, they don't get anything like the numbers they used to get, and they still can't get them using the same methods they're using, it's a different market. You're not talking about people who want to spend £80 or £90 a night in a hotel, that's the parents' generation, now it's the baby boomer generation and they're not arriving by coach it's more likely to be a minibus or a people carrier. They are much better off. It won't be health tourism in a patronising way. These are people who will spend money but as they get older, their world shrinks because they don't want to travel twenty-three hours to Australia. As soon as health insurance hits they won't be able to travel other places and the EHIC card will be a thing of the past. The amount of healthy days in my life is going to be exactly the same as my grandfather, all the extra days, if I'm lucky will come from medical assistance. That means there is a market over the next 10 years, made up of wealthy 70 to 80 year olds who aren't going to behave like the 70 or 80 year olds of the past. They won't want the same product that was given to them, they're very different people. Then there's people in their 30s, 40s and early 50s who are feeling very stressed and tired and they need rest and recharge opportunities.

We need to start thinking about the motivation for travel, some of those new, new emerging motivations. We need to stop thinking about when this market is coming or that market and think about what experiences you can you deliver in those weeks. What can you offer at different times of year? In December the seal centre is full of seals pups but they're gone by the summer. We want to get people to really start

thinking about where the customers are moving to and where some of the technologies will come in.

People actually want it very easy but still 'my choice.' Instead of thinking of attractions, attractions, attractions, you need to think of yourself as a venue for experiences, experiences you can build into that venue.

Some of the holiday parks are working very hard to get the locals to take part in this as well, to be attractive to them too. That's good news.

Taking children out of school

That's not going to change; however much people would like us to lobby in favour of taking kids out of school for holidays, that's not going to change. We've had lots of complaints about the Gove effect. But for schools, the Ofsted reports, teachers are not going to want to lose points on their roster because somebody wants to take Jimmy on holiday.

Dogs on beaches

Last week the council made a decision to change the rules about dogs and allow them on the beaches up until July. That's difficult, it presents challenges for tourism, we have to make sure that we work with every provider so that every dog that comes down on holidays is slapped with a code of conduct. It isn't just about dog poo, it's about being on the lead if you can't control your dog. It's about being respectful to people that haven't got dogs as well as picking up the poo. This one is a code of conduct for how you behave. They've been banned normally from Easter right to the end of September, and of course people don't want to put their dogs in kennels, they want to holiday with their dog. For these rich baby boomers, they are replacement children. It's not pester power, it's paws power.

What next for Looe?

The problem is some places tried to become too many things to too many people so that's where dollars are lost. If you want to go back to and look at where you were in the 1930s and 40s and 50s, what your market was...places that were more middle class or aspirational. Now we have a big issue about ethnic minorities. You need Muslim swimming sessions for women and children, they'll say 'Please put in morning and evening female and children only sessions.' It's the simple little things of understanding, the significant portion of the family market is moving and you've got to think about the culture of those people which of course is all new to our providers, they're not aware of it.

I think there are opportunities, I don't know what the policy should be like of putting the package together but it is new and interesting. If we look back to the 1970s we can say, yes, we were getting it right then and we need to get it right now.

Let's go forward in time, and let's go back and just remember why we are where we are. We need to look at these upcoming age groups and look at the customer base and see where they'll be in five years, that's the customer base you should be looking at.

Last minute and late bookings

It's interesting because people will be talking on Boxing Day about their holiday, they'll be talking about it two or three months before they book a short break or a traditional holiday. What happens is the transaction takes place later, because they can, because of technology. People keep their options open thinking it will be cheaper last minute but it doesn't work like that anymore. You used to be rewarded for leaving it until the last minute but look at Ryan Air, they reward you for booking early. More importantly you've got to incentivise people, provide an experience that is valuable to them but doesn't cost too much.

You've got to create a buzz, that's why events programmes are very important, it anchors people into a date. Just create a buzz and get people to sell it, it doesn't have to be huge, it's just reasons to prefer that week. It could be stuff in the streets, performers. It doesn't have to be huge, putting in 51 weeks of work for one week of benefit, we mustn't get distracted by things like that.

The industry has to avoid outsourcing its problems to other people to solve. If you get the industry to have a vision of where they want to go, then the other sectors can come in and give support, it's not a case of 'We've got a problem, you solve it.'