
Locum Forum

Turning the tide: Renewing the UK's Coastal Destinations



On Wednesday 9 January 2002, Locum Destination Consulting staged a one-day seminar at Thames Tower, the headquarters of the English Tourism Council and the British Tourist Authority. The latest in the ongoing series of Locum Forum events, the seminar examined a series of key issues affecting resorts and coastal destinations.

Chairman's address

Richard Tibbott (Chairman, Locum Destination Consulting)

Locum Destination Consulting is Europe's leading provider of destination consultancy services to the sectors of leisure, tourism, culture, regeneration and property development. We work with local authority planners, government policy-makers, Regional Development Agencies, advisory bodies, strategic agencies and destination operators, advising on a wide range of strategic and financial management issues. Coastal destinations are of particular importance to Locum - we've worked with colleagues throughout the UK - from Cardiff Bay to Plymouth, Southampton to Scarborough - and beyond.

Today's Locum Forum seminar is the latest contribution to the destination industry by Locum Destination Consulting. As well as publishing *Locum Destination Review*, the quarterly journal of record for the sector, Locum stages regular seminars such as today's in order to push forward debate on key issues, to share insights and good practice with industry colleagues, and to offer an opportunity for open discussion. We are delighted to be able to welcome you all to the Thames Room here at Thames Tower, home to both the English Tourism Council and the British Tourist Authority. Particular thanks to Claire Dinan of the ETC, from whom we will be hearing a little later, whose help in setting up the event is much appreciated.

I would also like to welcome all of our other speakers today, especially James Whelan, fresh from his term as Mayor of Atlantic City. We thank him for his presence. James will be talking us through the introduction of casino gambling in Atlantic City as a tool of resort regeneration - and the

sustainable economic benefits it has brought to the residents of his city. Our first speaker, Marc Etches, will present his ambitious plans to achieve a similar economic turnaround in Blackpool through the development of casino hotels. We will also hear from Tim Whitehead, who has been leading the plans to regenerate Torbay's resort economy for a number of years. Tim is also heavily involved with the British Resort Association's new Resort Action Group. Our final two speakers, Yinnon Ezra of Kent County Council, and Seán Young, a fellow Locum Director, will address different themes again. Yinnon has been closely involved in the planning of The Turner Centre, the new visual arts destination to be developed on the sea front in Margate. He will discuss some of the issues that led to the development, and outline the vision for the Centre. Seán, meanwhile, will introduce some of the key market insights and strategic principles that guide our work at Locum Destination Consulting.

A unique opportunity

Marc W. Etches (Managing Director, Leisure Parcs Ltd)

We have a vision for Blackpool that places the development of its tourism product at the heart of the town's economic and social regeneration. If Blackpool is to survive and prosper, it must find ways in which it can once again become internationally competitive as a destination resort. The development of Las Vegas-style resort casino hotels here in Britain's favourite seaside town would provide a powerful catalyst for economic and social regeneration that would have an enormous impact throughout England's North West.

The issue of UK competitiveness in international tourism is an essential consideration in determining where resort casino hotels might be located. We believe that the success of our proposals depends on focusing such development in a single location thereby ensuring sufficient critical mass of high-quality attractions, including global brand names, to attract sufficient visitor numbers to support the investment and jobs created.

We believe the Government has the opportunity to make this happen. Whilst the recommendations of Sir Alan Budd in his recent review of gambling would make resort casino hotels possible, the Government must bring about legislative change to facilitate a development that will not only be internationally competitive but will also inspire young, quality-driven people possessing sufficient creativity, enthusiasm and talent to build successful careers and make a real difference to the consumer's experience of tourism and hospitality in the UK.

Las Vegas is the entertainment capital of the world. More than 300,000 people from Britain alone visit there each year, more than from any other European country. Why do they go? For the best hotels, the best casinos, the best entertainment, the best restaurants and the best shopping. Perhaps Blackpool would never match the scale of Las Vegas but we can aspire to match the style of Las Vegas.

The Atlantic City Experience

If we look at the history and experience of Atlantic City in New Jersey, we see a town with extraordinary similarities to Blackpool. Like Blackpool, it was a popular coastal holiday resort back in the 1930s and 1940s - it even advertised itself as 'The Blackpool of America'. But by the 1970s it faced the same economic challenges Blackpool now faces - fewer visitors, low employment, and crumbling infrastructure.

Gambling was placed at the heart of the recovery plans for Atlantic City, as a unique catalyst for urban regeneration. By offering tourists the opportunity to walk off the street into a casino and play the tables or machines for a few hours, it was hoped that the town could be given the vital boost it needed in attracting not just new visitors but also those who would be needed to make the whole thing happen - investors, developers and operators.

Casino gambling was duly legalised in New Jersey, enabling development to commence. The belief of the public authorities that the new casinos would drive an upturn in the fortunes of Atlantic City has been proven conclusively. Some 50,000 people are now employed in its casino industry, and it welcomes 34 million visitors each year. Its 1,450 gaming tables and 32,500 slot machines generate annual tax contributions of \$450 million to the regional economy, which is invested directly in housing, infrastructure, community and economic development projects.



As was the case for Atlantic City, Blackpool sees the development of resort casino hotels as a unique opportunity to drive economic and social regeneration. By creating new jobs, new training opportunities and increased economic activity resort casino hotels can help reinvigorate the local and regional economies and deliver regeneration. It would be a fantastic new beginning for the town.

Pharaohs Palace

The first property we would like to develop has the working title of Pharaohs Palace, which would be strongly themed both inside and out. Estimated to cost in the region of £150 million, the development would be on a grand scale, comprising 100,000 square feet of themed gaming space (on which 80 table games and 2,500 slot machines would be available), 1000 hotel rooms and suites, 40,000 square feet of conference space, a 3,000-seat theatre for the performing arts, and 200,000 square feet of leisure and retail attractions.

We have calculated that Pharaohs Palace alone could generate 3,000 jobs and inject £100 million into the regional economy each year. More importantly, it would act as the catalyst to further development. We have been working in partnership with Blackpool Borough Council, the North West Development Agency, the North West Tourist Board and the British Tourist Authority to develop a long-term vision for Blackpool. All are in agreement with our view that Blackpool's history, location and economic situation make it the best destination in which to pilot resort casino hotels, as a test case for any new gambling legislation. We believe that the town has the capacity for several such resort complexes, which would bring with them not just added value to the town's tourism proposition but also huge benefits to the region as a whole.

Blackpool has a once-in-a-lifetime opportunity to embrace an economic catalyst powerful enough to re-establish itself as the premier seaside resort destination of Europe. Such radical change will not happen overnight, it will require

unprecedented partnership between public and private sectors and it will need enormous energy from all those involved. But it can be done.

Gaming: a tool for regeneration

James Whelan (Former Mayor, Atlantic City)

As a young man, I had what I thought to be one of the best jobs in the world - a lifeguard working on the beach at Atlantic City. It only lasted a brief time, but I would be out in the boat, in the sunshine, enjoying life to the full. One of the things I used to see every day was the main attraction at the end of Steel Pier - a high-diving horse that would leap into a big tank of water. It must have been bizarre and impressive at first sight to visitors. But after a few weeks of seeing the back-end of the same horse, I got used to it. It was a great novelty, but ultimately that was all it was. Novelties on their own aren't enough to keep visitors interested and keep them coming back.

Origins and evolution

When Atlantic City first started to emerge as a tourist destination in the 1930s, its visitors would often be workers from the major cities nearby - Philadelphia, Washington DC, New York and so on. Having a beach, and being a short journey away from their homes, Atlantic City was a natural choice. This was the first time in America's history that members of the working class had been able to take a vacation of any description, if only as daytrippers in most cases. It was as a result of the increased numbers of visitors to Atlantic City that our world-famous Boardwalk came about. Thousands of coastal resorts have boardwalks today, of course, but we in Atlantic City built the first one. It evolved in a very simple way, with planks of wood being laid down along the beach for people to walk on. Pretty soon, someone wanted to open a fairground ride next to it, to attract the passing visitors. Then came along food vendors, and so on. A critical mass built around the boardwalk, attracting more and more

visitors in the following decades. During this period, Atlantic City became known as 'The Queen of Resorts'.

But by the 1970s, it was clear that things weren't as busy or vibrant as they once had been. Atlantic City was not attracting the same volume of visitors from its traditionally strong local and regional market that it had done in its heyday. We still had the boardwalk, of course, and the piers. But the critical mass that had built, which had been so crucial to the resort's earlier success, had not evolved or moved on. Something was needed to bring about new momentum. We had fallen behind the times and were facing a pretty bleak future, especially in an age when affordable international travel to increasingly exotic destinations was becoming a real possibility for the first time. Not only that, but the standard of living and personal environment had also moved on - many people had swimming pools in their gardens, air conditioning in the house. There were fewer and fewer obvious reasons for Atlantic City's traditional visitors to make the trip to the beach.

Renewal through gaming

Something radical was needed to spark an upturn in the resort's fortunes and to bring about serious regeneration. It was proposed that that something should be casino gambling. Subsequently, gaming licences were granted to Atlantic City - purely as a tool of urban redevelopment. It remains the only place in the state of New Jersey to receive this permission. A series of Vegas-style resort casino hotels were developed along the sea front, which have succeeded in attracting back millions of visitors. Before opening their doors to the public, the casinos were offered a choice: either make a voluntary corporate contribution of 1.5 per cent of earnings towards the local economy or face a 2 per cent tax. It's not too difficult to see which was their better option. Thanks to this system, millions of dollars have become available for improved housing, education, healthcare and transport. Atlantic City has enjoyed a remarkable economic and social renaissance over the past 20 years.

With more visitors and increased spending in the casinos and other attractions has come massive infrastructural change. Hotel gaming has worked for Atlantic City exactly as it was intended to: as a tool of regeneration. During my own tenure as Mayor, I oversaw a wide range of new developments including housing, significant community facilities like the Boys and Girls Club, a new professional baseball stadium, a \$250m convention centre and the billion dollar Borgata Casino Hotel, currently under construction. Life has changed for the better, not just for our visitors but also our residents.

In Atlantic City, we have an old saying: 'Ocean, Commotion, Promotion!' It's possibly over-simplified, but it touches on the slightly 'naughty but fun' image that the resort has



traditionally had. It's certainly true, for example, that in the early part of the century, prohibition was only ever a rumour in Atlantic City. Bars would serve beer and nothing was concealed or secretive. This image is something that we are not afraid to embrace. It's part of our history, and as long as we manage it correctly, and use it to the advantage of our visitors and residents, then it's a positive for us. Resort managers can learn much from our experience:

- don't be afraid to try something radically new;
- work closely with the private sector from the earliest opportunity;
- use your traditional brand strengths to your advantage;
- always look to maintain your critical mass and forward momentum.

Sea Changes: making it happen

Dr Claire Dinan (Policy Manager - Sustainable Tourism, English Tourism Council)

I'm sure that the first thought that springs to all our minds at such a seminar is, 'Here we are again...!' The issues are well known, and most resorts are still in decline. The familiar question we face is 'How can we make it happen this time?' There is, of course, no all-singing, all-dancing panacea, but one thing is absolutely clear: we need to work together to bring about real change. That means the Government, strategic agencies, local authorities, tourist boards, destination managers and private sector operators.

The first step in recognising and addressing the scale of decline faced by the UK's resorts was the production of the Sea Changes report by the English Tourism Council. Tasked to investigate the issues of resort regeneration by the DCMS strategy paper, Tomorrow's Tourism, the ETC published Sea Changes in 2001. It was produced with the assistance of the Resort Regeneration Task Force, a group of industry experts. The report outlined the key factors behind resort decline, and made a series of recommendations covering funding solutions, the profile of resorts within Government, product quality and development, research, transport links, information and communications technology (ICT), and the roles of local authorities, Regional Tourist Boards and small business.

Time for action

The time has now come to implement the recommendations of Sea Changes. In order to achieve this, we need to identify the key processes and actions required. The key to success will lie in resorts deciding what the best actions are for them, taking into account market conditions and tourism trends,



geographical location, competition, image and promotional issues and funding possibilities. Some, for instance, may decide that tourism is no longer for them, or that it cannot be expected to continue to provide the mainstay of the local economy. Whatever they decide, a partnership approach will be required, led by resorts and supported by others.

We at the ETC have no doubt about the potential role of tourism in helping to deliver economic regeneration of seaside resorts. We believe such regeneration will only be possible if a number of key principles are followed. First and foremost, resorts require a clear vision, sound planning and strong leadership. Second, it is time for an holistic approach to the tourism experience to be adopted by all involved with resort management. It is abundantly clear that resorts need to be viewed both as destinations for visitors and homes to residents - master plans must take into account the needs of both groups. And third, if resort master plans are to be delivered effectively, the required tools must be secured.

So what needs to be done at a national level? Coordinated funding for resort regeneration should be a priority for the Government and the Regional Development Agencies (RDAs). The DCMS should produce guidance for funding agencies to ensure that coordination and take-up of funding for resorts is improved. It is equally important that the profile of tourism within Government should be raised to a level commensurate with the scale of economic challenge facing the UK's hundreds of struggling resorts. This covers not just the department responsible for tourism itself (DCMS) but also those departments responsible for Government Offices in the Regions and Business Coordination (Cabinet Office), funding (DTI) and local government (DTLR). Local government also needs to review its own regeneration activity, and should make the most of local strategic partnerships.

Additionally, resorts will need to make qualitative improvements, and will need to make crucial decisions about product development and possible diversification. Whatever decisions they make will, in turn, depend upon market intelligence – another area requiring considerable improvement. And most coastal resorts, by virtue of their peripherality, will need better transport links. In the age of the internet, ICT should be employed by resorts to their advantage. And last but not least, it is vital that entrepreneurialism is harnessed in resorts.

In order to help bring about the above, the ETC will continue to help resorts improve the quality of their tourism product, and will work with the British Resorts Association (BRA) and others in a coordinated approach. The BRA will act as a key process driver, source of expertise, advice and lobby group. And on the ground, destination managers themselves will seek to translate ETC strategy into action in resorts themselves.

The ETC is convinced that the market for resort-based tourism still exists, provided the vision, determination, co-ordination and investment are forthcoming. Collective action and a holistic interpretation of resorts should ensure that we in the UK can create quality tourism experiences through our resorts that will compete with the best in the world.

Action for resorts

Tim Whitehead (Director of Strategic Services, Torbay Borough Council)

The most important thing to remember about resorts is that they are, first and foremost, about people – visitors and residents. If the inhabitants and guests of coastal resorts were animals, birds flora, rock types or buildings, I bet an organisation would list them, protect them, zone them or give them endangered status. Resorts need that status too, but for the species and habitat to survive not as a museum piece but as a competitive economic entity.

If we look at the economic factors facing resorts, a few home truths emerge:

- Economic active below national average (-8%)
- Above average part-time working (+25%)
- Above average self-employed (+24%)
- Above average unemployment (+9%)
- Significantly below average manufacturing base (-25%)
- Higher than average service base

Resorts promote sun and sand and strive to create a high-quality, stylish image. They do their best to sound prosperous, and to promote quality shopping, a variety of theatres and

other forms of entertainment. But the reality is different: resorts share the same economic and social problems of urban areas. Among the key challenges facing resorts are:

- Distorted demography
- Low GDP
- Higher unemployment and low wage levels
- Seasonality problems
- Peripherality issues
- Deprivation
- Social issues
- High benefit society

Most UK resorts were developed in Victorian times as holiday destinations, usually for the wealthy. Resort growth came in the postwar period, during which time visitor numbers and populations grew for mass markets. Then resorts became 'nice places to retire'. But the infrastructure had been built for tourism. As a result, little other industry had been attracted – or wanted. The peak of visitors was reached by most resorts in the 1960s and 70s, before competition from overseas destinations took away, firstly, many of our wealthier visitors, and secondly, many of our mass market tourists. In reaction to this, our marketing became more proactive, and as traditional holidays have declined, the short break and themed holiday markets have developed. The result is that we have:

- too extensive a tourist infrastructure for the 2002 market place;
- a downsizing of the seaside resort market;
- spare capacity for buildings;
- growing social and economic problems;
- areas not attracting alternative industry.

Sadly, what binds most UK resorts together today is the fact that they all appear on the index of most deprived wards in the UK. Even the countries most economically successful resorts, Brighton and Bournemouth, have a sub-100 per cent score on the index.

What this all adds up to is that there is an unprecedented need for resort regeneration in the UK.

Following the publication of *Sea Changes* in 2001, the political profile of resorts has increased, but further action is now needed. A National Resorts Action Group has been set up at the move the agenda forward at the national level. The RDAs are expected to become more involved in regeneration activity, and individual areas and districts are aware that they need to move their plans forward. A masterplan is needed for each resort, building on distinctive features and brand values. Action Teams are also needed for each resort or area, as is Government Aid for small businesses in resorts.

According to a survey in December 2001, 50 per cent of resorts have the plans or strategies for regeneration in place, and are starting to be holistic in their planning. Additionally, they say they have projects they need, but it is difficult to see progress being made. They also generally lack gap funding, and are still suffering a lack of private sector investment potential.

The Torquay experience

In Torquay, we have our own regeneration challenge, which focuses on the land in and around the harbour. Some form of new development was being encouraged by the hotel operators and local traders, who wanted to see improvements made to the harbourside area. Over recent years, funding applications for Objective 2 and SRB have been submitted and accepted. With previous schemes over some 10 years we have had to deal with a series of setbacks to our plans, as potential private sector partners have pulled out of proposed new developments. Viability was always an issue.

When in 1999 we finally had a scheme to progress, which involved the waterfront around the harbours as well as the Beacon site, progress was once again halted by the Grade 2 star listing of two concrete D-Day embarkation ramps on the prime quay area (pictured right). The project had proposed their demolition to provide state-of-the-art regeneration facilities for the scheme and for watersports. Subsequent structural and safety surveys have highlighted that they will cost £1 million to repair but will not be used as they are too steep. A classic case of preserving things - in this case, useless things - rather than taking into account the considerations and needs of the area's people. Thanks to the intervention of English Heritage, the whole of our regeneration planning was turned upside down.

On the positive side, alternative plans for different parts of the harbour and site have now been considered, and a solution has been agreed. This will entail the development of a highly innovative marine aviary called 'Living Coasts' at which the public will be able to view birds diving underwater, along with sea otters and other aquatic wildlife. The lessons for other resorts that come out of our experience in Torquay can be summarised as follows:

- planning for destination regeneration must be holistic, taking into account more than just 'tourism';
- the local authority must work closely with the private sector on specific projects that will improve the overall economic performance of the resort;
- it is essential for local authorities to increase private sector investment confidence;
- funding is critical, and will most likely come from public and private sources.



In addition to all of these points, it is important to add that all resorts could benefit from the contributions that can be made by their own 'champions'. The power of local celebrities to raise the profile of resorts should not be underestimated, and neither should their potential to increase political support for resort regeneration at large.

Resort regeneration in Majorca

It's also worth briefly mentioning the Majorca experience. In Majorca, the local authorities and tourist operators decided upon collective, coordinated action to rectify the problems that were being experienced by their own tourism-based economy. Many of Majorca's resorts were developed in the 1960s. High-rise concrete hotels featured prominently along the shoreline, along with pseudo British fish and chip shops, pubs and other forms of inappropriate, unrestrained development. Through a combination of tactical marketing in the short term, strategic planning in the medium term, and a visionary approach to long-term resort regeneration, Majorca managed to turn around its ailing resorts. The island's political leaders provided drive and vision; an island-wide hotel federation was formed, helping to bring dynamism and focus to the industry; and an organisation that brought together 25 hotel associations, representing 837 hotels (197,134 bed-spaces and 74% of the total beds on the island) was formed.

Through collective action, resort regeneration became a reality. The flow of visitors was re-organised; coastal areas were reclaimed from former developments and cleaned up; huddled town centres were cleared out. The action plan also included the demolition of earlier 'mistakes' - hotels which had only been in existence for 20 or 30 years - to make way for more appropriate developments.

The Majorcan authorities enforced stringent laws and made sizeable investments in order to improve infrastructure and

appearance, reduce capacity and extend the season. All of this was made possible because the parties involved collectively woke up to the fact that modern consumers are, not surprisingly, very sensitive to their holiday environment. Which brings us back, once again, to the fundamental realisation that should now be hitting home in Government, in the RDAs, in local authorities, and in the private sector: resorts are essentially about people, whether we are taking about residents or visitors.

To summarise, UK resorts are now in desperate need of the following:

- holistic vision and strong public leadership;
- changes in culture that reduce bureaucratic delays and uncooperative behaviour;
- better partnership between all resort stakeholders and decision-makers;
- more and better funding options;
- up-to-date research;
- the support of the community.

Margate and The Turner Centre

Yinnon Ezra (County Officer for Community and Cultural Services, Kent County Council)

Kent is a much bigger county than is often realised, and, contrary to its traditional image as the well-heeled 'Garden of England', not all of it is prosperous. It boasts the port of

Dover, and several major employers in the region, such as Pfizer (the producer of Viagra). But it is somewhat lacking in the facilities that it needs to keep its residents interested. Kent residents need to go into London to visit major galleries, exhibitions and attractions. There is currently no major visual arts venue in the whole of Kent.

All that is about to change, however, with the creation of The Turner Centre.

The Turner Centre is to be located in Margate, which is part of Thanet, where Kent County Council and its partners are initiating a wide-ranging regeneration programme. The Turner Centre is to be a major new visual arts facility, which will forge links between historical and contemporary arts, and strengthen long-standing links with mainland Europe. It will provide the whole population of Kent and the South East with a valuable new cultural resource. As such, it is exactly the type of development that the region's major employers have been calling for - something that will act as a new source of interest to the area's workforce, and convince them to stay in the area.

An international architectural competition for the Centre was launched, and culminated in the appointment of Snøhetta and Spence Associates Ltd. According to their design, which was unveiled last year to widespread acclaim, The Turner Centre will be housed in a wonderfully innovative sculptural structure, situated partly on Margate's pier and partly in the sea itself. The external skin of the building is to be untreated oak, which will be fixed to a reinforced concrete structure. This clear and confident building will undoubtedly have strong visitor appeal. It will re-activate the pier, and the surrounding area will also be landscaped. Inside, a series of exciting galleries will house a range of exhibitions. The competition assessors felt that the design scheme presented a strong design statement in terms of its form and location, combined with a simple and effective internal layout and clear strategy for the remainder of the site. The cost for the building will be in the region of £7 million, with further sums being required for the surrounding works.

The Turner Centre will be a landmark destination, which will breathe new life into the pier and its surrounding area, and reinvigorate the whole town. The Centre's development will also create many jobs, of course, and make a significant contribution to the local economy. With the development of The Turner Centre will come increased profile for Margate, Kent and the South East as a whole. We can build on this to attract more visitors and investment into the area. In the longer term, the Centre can be held up as an example of what can be achieved in Kent, through strong public leadership. It will also demonstrate the county's aspirations to deliver leading-edge cultural and leisure experiences to its citizens - and to its increasing numbers of visitors.



Rethinking and sustaining coastal destinations

Seán Young (Director, Locum Destination Consulting)

In Locum Destination Consulting's experience, strategic planning initiatives for resort regeneration often have rather disjointed beginnings. Issues of 'secondary' importance, such as transport and access, architecture, design and detailed planning frequently dominate discussion at this early stage. We strongly believe, however, that the fundamental questions that need to be addressed are 'How will this resort work as a consumer proposition?', and 'How can it be branded for success?'

Creating a destination that is sufficiently strong, differentiated and marketable as a consumer proposition is, in the long term, even more important than the key 'front-end' questions of funding, investors and capital development needs. It is, after all, not investors and public funding authorities who sustain the profitable operation of a destination. It is consumers. The destination's return on investment depends ultimately not on buildings, but on individuals, seeking a destination experience.

Destinations and the experience economy

Locum Destination Consulting defines a destination as 'somewhere worth leaving home for', and this is as relevant to a coastal resort town as it is to an attraction, a museum or a theme park. People make destinations - the people who conceive them, the people who develop them, the people who manage them, but above all the people who consume their products.

In a successful destination, the product on offer is experience itself. Committing time to that experience must be rewarding for the individual; spending money on that experience must be worthwhile. In the experience economy, destinations must constantly 'reinvent' themselves to encourage repeat visits and survive. This economy of experience is about quality, service and choice - it is not about size. Every destination is experienced on the smallest possible scale - by an individual visitor making an individual choice. Successful destinations of whatever size sell expectations, experiences and memories to individual consumers.

The changing visitor destination marketplace

In addition to the demands of the new experience economy, the visitor marketplace itself is changing.

Destination consumers are now spoilt for choice, and they are becoming more and more sophisticated. With budget

airlines offering competitive packages for leisure breaks overseas, it can often be cheaper to take a leisure break in a European country than a UK destination.

The short break market is growing at a phenomenal rate - the UK alone has experienced an average annual growth of over 10 per cent between 1993 and 2000. The encouraging news for resorts is that, according to research, short break visitors are particularly interested in themed cities and maritime / coastal destinations which offer a wide choice of activities and events.

We are also becoming a more cash rich, but time poor society. So those destinations that win, will win big. Resorts must therefore offer value for time as well as value for money by offering a range of activities and experiences within an integrated package.

Finally, to respond to the demands of the experience economy and the changing marketplace, visitor destinations must provide consumers with ever more personalised media content.

How can resorts compete?

To respond to the new experience economy and changing visitor destination marketplace, new types of visitor destination strategy are needed for resorts.

'Destination makers' - those people planning the development of their resort - need to consider a consumer-orientated, not supply-driven approach. First ask how to find, reach and retain consumers/visitors and only then start thinking about product.

With this approach in mind:

- Reliable market research and analysis is the bedrock. It is vital to understand the visitor and their needs.
- A clear vision for the unique consumer proposition and destination experience of the resort will focus development, management and marketing thinking.
- This vision and the values of the destination experience must be captured in a powerful brand promise.
- High quality experiences through a series of integrated products and services are needed to make a visit to a destination worth consumers' time and money are required to match the brand promise.
- Strong, personalised, targeted marketing is needed to attract consumers' attention.
- Destination managers must always be concerned to build brand loyalty to encourage regular and repeat visitation.

Planning an integrated destination

A comprehensive Destination Review - a thorough analysis of the resort's 'destination offer', which will identify strengths

and weaknesses - is a useful process in planning for an integrated destination. Locum Destination Consulting suggests that all parts of the visitor experience are examined by analysing and testing the resort's offer against the following list of key elements that should comprise an integrated visitor destination:

1. 'Attraction' projects - which create awareness and attract the market

- These are the capital 'building' projects that raise the profile of the resort and motivate visits - including hotels, visitor attractions, museums, galleries and event venues.

2. Support projects - which create a sense of place

- These are the infrastructure and support projects that are needed to ensure that the resort works for the visitor - including public transport, roads, car parking, accommodation, signage, interpretation, shops, restaurants, visitor information centres and visitor amenities.

3. Service and management projects - which manage and sustain the destination

- These are not capital build projects but rather the services that require on-going revenue support. They are absolutely vital to the long-term sustainability of the resort as a successful visitor destination - including marketing, promotion, brand management, visitor management, city centre management, crime prevention, cleanliness, and events and activities.

A Destination Review following these guidelines will help to identify gaps in both physical provision and, crucially, service and management provision. It should then be possible to

prioritise the projects that need to be completed to fill the gaps and prepare an informed action plan for development and funding.

Build your destination brand values

A commitment from the start to develop a destination brand is a powerful 'secret weapon' in the competitive visitor destination marketplace.

Every resort has a brand, even if it has not been proactively developed by the destination manager. But proactively developing and shaping a destination brand helps a resort to gain a competitive edge and to differentiate itself from its competitors. The brand strategy can encourage closer integration between individual tourism providers and partners as well as joint marketing and promotions between them.

The brand serves to provide the foundation for all marketing activity and helps to promote the destination experience more effectively. Brands are highly valuable - they can engender consumer loyalty and long-term commitment, which encourages repeat visitation.

As the diagram illustrates, a brand must encapsulate all the key elements of the integrated destination experience.

A resort for visitors, residents and investors

Strategic planning for the regeneration of a resort as an integrated visitor destination necessarily involves consideration of almost all elements of the resort experience and offer - from road and transport infrastructure through to parks and public spaces, retail, catering, attractions, museums, the night-time economy, leisure facility provision, signage, interpretation and so on.

As a result, visitor destination planning addresses many of the issues of direct relevance to both residents and investors. Therefore an approach to strategic planning that recognises the needs of the visitor (and the benefits that tourism brings to the city economy) also recognises many of the needs of residents and investors. A resort that is attractive to visitors will also be attractive to residents and investors.

It is also possible to apply the Destination Review approach to the resident and investor market, as outlined in the table below. A number of components of the resort offer are common to the needs of visitors, residents and investors.

In conclusion, the key lesson in applying destination thinking to regeneration planning for resorts is to always start with the consumer. Ultimately, it is people that make destinations successful, not buildings and infrastructure. Destination managers must always hold the consumer proposition and resort destination brand firmly in mind when undertaking strategic planning.

