

# Tourism in Torbay

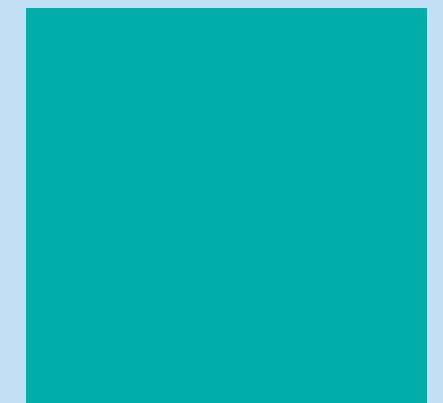
## Tourism Strategy 2005–2015

If you would like to receive a copy of the Tourism Strategy in large print, please contact us.

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# Tourism in Torbay

## Tourism Strategy 2005–2015

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## Executive summary

**This strategy identifies the issues facing the tourism industry in Torbay and sets a clear agenda to ensure Torbay and the English Riviera brand is recognised as a leading resort with a sustainable future. It is evident that Torbay must be mindful of the changes in the market place and competition from domestic and international destinations. However, and most importantly, Torbay must respond positively to customer perception and expectation in terms of service quality and delivery, and product offer in general.**

Tourism is Torbay's biggest single sector, and it directly and indirectly represents an economic impact of £442 million per annum and 32% of the district's employment.

The Torbay Development Agency (TDA) is responsible for the operation of the English Riviera Tourist Board and will ensure that all tourism work fits within the wider remit of stimulating the development of a prosperous economy and creating increased employment in Torbay for a more sustainable future.

The English Riviera Tourist Board will be responsible for leading this strategy and aims to realise the potential of the English Riviera as a tourism destination of national and international importance, by:

- 1 Ensuring that research into tourism trends focuses and underpins all infrastructure, product and promotional activity.
- 2 Ensuring that all aspects of the industry are engaged and working to a common goal, enabling realistic and relevant product and infrastructure development.
- 3 Ensuring that there is connectivity with infrastructure developments and other external factors, including communications and access, which will impact on the tourism product.
- 4 Ensuring that the tourism product and associated marketing is developed to meet the needs of market segments that will provide a sustainable future for the resort.
- 5 Ensuring that promotional campaigns, press and PR and events are focused to reach those targeted market segments, as well as elevating the external profile of Torbay.

## Current position

Torbay first became fashionable as a resort in Victorian times when the country's wealthy began to enjoy the fine weather and beautiful scenery of the English Riviera. Torquay was then described as the "Queen of the Riviera" and in the 1980's the modern day English Riviera brand was developed.

Tourism in Torbay today accounts for 1.45 million staying visitors plus 3.8 million day visitors, generating a direct and indirect spend of £442 million per annum. This represents around one third of the area's wealth and also one third of its jobs.

Visitor numbers peaked in the 1970s at over 12 million tourist nights. By the start of the 1990s this had fallen to just under 10 million and by 2003, just under 8.5 million. Although the figures now appear to be static there is a real risk that further decline will significantly affect the viability of many operators within the sector. Torbay's loyal, core markets are not high spending, and this lack of higher spend has stifled strong investment.

### VISITOR SURVEY 2003

- Torbay attracts a high proportion of staying visitors (87%), day visitors (6%) and touring visitors (7%) featuring less prominently
- The majority of visitors are adults holidaying without children
- 63% are 55+, 16% 45-54, 10% 35-44, 9% 25-34 and only 2% 16-24
- 59% are C2DEs
- 80% are repeat visitors
- They spend their time shopping, walking and spending time on the beach as well as attending events and the theatre
- 16% were part of an organised group

In summary, tourism is an important industry to the area and should be embraced by the local industry to maximise its impact to the economy of Torbay and the local population. We must be mindful of, and respond to, the fact that visitors now gain experiences from other products and destinations around the UK and around the world, and they have become more sophisticated in their tastes from these experiences.

Torbay is an incredibly strong resort which has placed an unsustainable reliance on core markets and has not maximised opportunities to build new markets with real volume, and value potential for the future – an issue which this strategy aims to address.



## Future potential

The 1995–2005 tourism strategy illustrated a 10 year decline in tourist nights and predicted that this would continue without investment, co-ordination and the determination to succeed. It is clear that some of the elements required to buck the trend are in place, however, the lack of connectivity of these elements and an unfocused approach means that potential has not been harnessed and Torbay has not yet grasped the opportunity.

The last decade has seen tourist nights decline by a further 6.5% with the exception of a slight, yet encouraging peak in 2002. It is evident that this peak cannot be converted into sustained growth without focused product development and promotion of year round tourism.

### THE NATIONAL PICTURE

Continued large-scale growth in the tourism industry world-wide is forecast with long haul destinations seeing the highest growth. The 1990's saw a 34% increase in holiday related domestic trips, with the highest increase in the 'visiting friends and relatives' (VFR) market and a continued move to 1–3 night trips.

It is important to note that more short or additional holidays are now taken in the UK rather than long holidays, and the long main holiday in the UK has declined significantly. The growth of short breaks is reducing seasonality but this is predominantly weekend based in its demand, and seaside destinations have experienced lower growth than city destinations. VisitBritain's Business Confidence Monitor notes that businesses are generally more optimistic with two thirds anticipating growth in 2004.

The consequences of these trends for the English Riviera are likely to be:

- increasing demand for quality, convenience and security
- increasing demand for activities, relaxation and learning skills
- increasing demand for 1–3 night holidays
- increasing demand for 'one person' holidays
- increasing shoulder month demand
- increase in grandparents taking grandchildren on holiday (and a desire for more traditional holiday activities)
- a family market more accustomed to higher standards and broad range of leisure options
- growth in VFR market
- arts, culture and history featuring strongly in destination choice
- increasing success for new, authentic and innovative holiday concepts and products that distinguish themselves by added value
- increasing demand for 'holidaying with the tribe' be they friends, sporting groups, reunions etc.

Non-tourism leisure spend is also in competition with UK holidays and many urban centres in particular now offer a huge range of activities. The 'stay at home' holiday is also a threat – with DIY, gardening and computer games, all competing for the leisure pound.



Living Coasts



Torquay Harbour footbridge



Torbay Leisure Hotels Leisure Pool



Torquay Waterfront Regeneration Project (phases 1 and 2)

Torbay is in an excellent position to take advantage of these national trends and aim for planned and sustainable growth; resort management is strong and Torbay benefits from natural resources and comprehensive year round product offering. The physical infrastructure and product can and should be developed to appeal to a wider market place, this should include public realm improvements and events of regional, national and potentially international importance, whether these be focused on Torbay or part of a wider experience.

It is clearly crucial to support tourism in Torbay in its widest sense, and realise the potential of all of the key elements (sports tourism, event tourism, business tourism, and cultural tourism). This strategy aims to be the launch pad for this connectivity, to drive the individual elements forward in a connected approach.





## Strategy for a sustainable and profitable future

There is a great potential to attract a wider market to the English Riviera, and this should be the aspiration of the local industry, in partnership with the English Riviera Tourist Board and the Torbay Development Agency. Core principles of the strategy:

### WORKING STRATEGICALLY

All actions detailed within this strategy are based on industry research, proven tactics, industry benchmarking and best practice knowledge.

### WORKING IN PARTNERSHIP

Torbay's tourism sector must be co-ordinated and focused working in partnership, not only in targeting key market segments, but also in developing the product and raising quality standards in every aspect of the customer experience. Partnership is essential so that the visitor of the future can experience the highest standards of customer service and quality at all times – from enquiry to booking, arriving, staying and enjoying their holiday.

Additionally, partnership working with neighbouring destinations will maximise the ability to capture the touring market; visitors do not remain within set boundaries. It is crucial to harness the planning system to help deliver any land use objectives within this tourism strategy, and the Adopted Torbay Local Plan (1995–2011) is fundamental in guiding regeneration.

### RAISING THE GAME

There is clearly the potential to widen the range of market segments enjoying an English Riviera holiday. We need to work to target and to attract the growing segments that have more flexibility, more spending power and more propensity to promote the destination. We must realise the need to adapt in order to offer a different experience; a holiday that exceeds quality expectations, can be easily booked and one that includes the activities and experiences that will bring that customer back again and again.

The implementation of a dedicated quality approach to destination and product development will ensure that the English Riviera offers excellent levels of customer care, service quality and experiences to its visitors. This approach will focus the improvements and developments which are essential elements of achieving such aspirations. All work in raising quality will be developed in conjunction with the VisitBritain Quality Strategy, to ensure national connectivity and maintain the importance of the national grading schemes; local schemes will not form part of this process.

### ADDRESSING NEGATIVES

The industry must recognise the limitations of Torbay's product offering and ensure that, by working together, it strives to effect changes in the experience within Torbay and the profile generated externally. There is a need to concentrate on those areas which can positively and negatively effect the profile of Torbay, including the customer care, nightlife offer and policing, management of the public realm, out of season events and promotions and the physical infrastructure (traffic, transportation links) of the current product.



### SUSTAINABILITY

A holistic approach to developing elements of the Bay's tourism sector in a way that is wholly sustainable from the viewpoint of the visitor, the industry, the community and the environment.

### ATTRACTING NEW CUSTOMERS

There are clear opportunities for building on the existing core markets by targeting new market segments; Torbay must work together to develop the product that those markets require and promote the product in a way that results in measurable business growth. This growth will be year round growth and will represent a higher spend in our accommodation, our attractions and our retail and dining sectors.

Torbay, as the English Riviera, has a strong core product and external image. However, in developing future markets it is important to ensure that the holiday experience exceeds the expectation of the visitor. Complacency is likely to result in the continued slow decline of the sector, conversely, a sharp awareness of changes in the market place and an ability to evolve to meet the requirements of visitors can result in a sustainable and profitable future for Torbay.

### THE LOCAL TOURIST

Every local resident has the potential to be a tourism ambassador; their pride in and understanding of the tourism product should be maximised through targeted and monitorable campaigns.

Community groups, the education sector and individuals should be engaged and encouraged to support the resort, its resources, attractions and events.

The VFR market is a key segment for the English Riviera and programmes should be in place to facilitate visits for local people and their guests. Everyone in Torbay 'owns' the English Riviera and should be proud to promote what it can offer at every opportunity.



## The key actions

To position Torbay, and the English Riviera as a leading resort, achieving sustained tourism business and aiming for growth compared against the national market, a clear action plan must be in place and supported across Torbay. The main pillars of this action plan are:

### STRATEGY AND POLICY

The TDA is clearly positioned with the responsibility for regeneration, and this strategy will focus the work of the TDA and the English Riviera Tourist board and act as a tool to stimulate local industry support. In engaging with the local industry and offering a co-ordinated and focused direction, the TDA is best placed to enable the English Riviera to realise its potential and future sustainability.

The TDA will champion, lead and communicate all policies and ensure connectivity across Torbay. The TDA will also integrate this strategy with those of relevant economic and tourism bodies in neighbouring authorities at county, regional and national level.

We will:

- adopt and adhere to the aspirations of this strategy to take Torbay forward and realise its potential
- work with all relevant tourism related bodies to promote this strategy and its aspirations
- produce an annual operating plan, with targets and aspirations which can be tracked and reported on
- work closely with partners in defining long term policies which will lead to a more appealing and sustainable destination, including quality and alcohol management
- work with South West Tourism and partners in Devon to ensure connectivity to Towards 2015 the regional tourism strategy and proposed delivery
- work closely with the Cultural Partnership to improve, celebrate and showcase the cultural offer of Torbay, and particularly to maximise the impact on Torbay of national and international events (Tall Ships, Olympics 2012)
- work to seek external funding to support events and develop experience based visits
- ensure strategic development supports tourism in its widest sense, including business tourism

We will encourage others to:

- work closely with us and maximise our external impact
- consider their future strategies and how we can link together
- adopt the principles of this strategy, and consider how they take part in realising the future of tourism in Torbay

### RESEARCH

An annual programme of research, monitoring and benchmarking, which will assess not only customer expectations and perceptions, but also identify areas for development, improvement and key opportunities which should be maximised.

We will:

- monitor and benchmark effectiveness of tourism activity on an ongoing basis
- respond to the outcome of research and ensure that the product meets the aspirations of visitors
- inform the tourism sector of verified trends and related business growth opportunities

- measure our impact in key markets through an annual programme of data capture, surveys and programme research
- monitor external perception of the English Riviera, by visitors and non-visitors and respond accordingly
- commission destination benchmarking on a three yearly basis, and participate in annual benchmarking and sharing best practice through the DP:UK (destination performance UK) network
- produce an annual research bulletin to forecast and update the industry on market changes

We will encourage others to:

- shape tourism product to meet current and evolving market demands
- share market intelligence
- participate in data collection
- monitor the effectiveness of new campaigns, and identify the requirements of visitors and the need for product development

### PRODUCT AND INFRASTRUCTURE DEVELOPMENT

Product and infrastructure must be in place to maximise the potential of the development of new market areas, and clearly position the English Riviera. In the face of stiff international competition the resort has been in decline. Major product and infrastructure development is required to reverse this trend.

The TDA's tourism arm will prioritise schemes that promote local distinctiveness and develop packages and promotions that are accessible and targeted at key market segments. The booking infrastructure will evolve to meet the information and booking needs of the 21st century customer.

We will also engage with those agencies, which can positively impact on the atmosphere and environment of the English Riviera, to ensure that a clarity of vision and strategy for holistic product development is in place.

With Torbay Development Agency colleagues we will work to develop capital projects worthy of a 21st century resort and demanded by 21st century customers.

With Torbay Development Agency and Torbay Council colleagues we will ensure that the Local Plan reflects this strategy and evolves to meet the long term needs of the tourism sector. This includes tourism and tourism related businesses, sustainable retail development and the public realm.

We will support public and private sector colleagues across the industry to develop relevant product including new and substantial events, new and enhanced visitor attractions and enhanced water sports facilities. We will also support the development of promotional packages and sales channels in line with market projected market demand.

We will develop the Quality in Torbay standard, to ensure that we can respond to the needs of the visitor, industry, community and environment, and enable the local industry to focus on attaining a sustainable destination. This sustainable approach will incorporate real targets on environmental and accessibility issues.





We will:

- use benchmarking of the destination, its management and its promotions to maintain a strong position in the market
- develop the English Riviera Tourist Board, the call centre, website and booking mechanisms to ensure that we are able to deliver the product to the customer
- work closely with the current product (accommodation, attractions and tourism services) to ensure that they are prepared to meet the needs of existing and new customers, and can effectively compete in the wider tourism market place
- develop 'off the shelf' products and packages, with the current product, which can be targeted at new market segments
- develop 'attractors', which are relevant to the destination and which appeal to the local market and encourage visitors (water based activities, events, packages, themes and experiences)
- offer business support, networking and facilitation to encourage product development

We will encourage others to:

- focus their development and work to ensure that their product offer meets the needs of the customer
- work with agencies such as Enterprise South Devon and Business Link to ensure continuous improvement and development through sharing best practice and learning from others, training, development and business planning
- support this product development in strategies at organisation level within the wider public sector and the private sector
- realise the importance of sustained product development, and the need to ensure that their product remains relevant and in line with customer need and expectation
- source and prioritise the use of local products, and maximise the impact of promoting local distinctiveness

## PROMOTION

The TDA will continue to support activity which attracts traditional markets. This continues to be the backbone of the resort's customer base and tourism spend. However, the TDA will embrace all opportunities to increase visitors and visitor spend. The TDA will particularly concentrate on attracting sustainable and more affluent visitors at off peak and shoulder periods, targeting specific market segments with dedicated packages and promotions. Growth in new markets will be specifically targeted at business outside of the July and August peak.

### TRADITIONAL MARKETS – CONSUMERS

The traditional markets (older couples and families) will be supported, and we will ensure that the product meets and exceeds their aspirations and expectations and that quality information is developed to optimise trade from these sectors.

### TRADITIONAL MARKETS – TRAVEL TRADE AND GROUP

The travel trade and group market will be fully engaged in a programme of product development and promotion to meet the specific needs of this market sector.

### NEW MARKET DEVELOPMENT – DOMESTIC CONSUMER

To underpin the traditional markets, new markets will be developed to ensure a wider and more sustainable tourism offer.

### NEW MARKET 1 – FINALLY FREE

This market is the 50+ couples whose children have flown the nest. They are enjoying more breaks and wish to discover new places, enjoy new experiences and do things they couldn't do when bringing up a family. For this group the English Riviera is about enabling them to do whatever they want to do – long walks, arts & craft, history and heritage and of course relaxing.

### NEW MARKET 2 – FAMILY FUN

Families with young children looking for hassle-free holidays and able to enjoy the English Riviera's sandy beaches, paddler friendly waters and rockpools, family friendly attractions and friendly welcome. They will come to us to create those special family moments and memories – sometime recreating moments from their own childhood.

### NEW MARKET 3 – RIVIERA RUSH!

This market is the under 50s who wish to try something new, learning new skills and have an adrenaline-rush holiday break. They will come to the English Riviera to enjoy our fantastic Bay and its 16 square miles of sheltered warm seas. Specific activities promoted will include sailing, windsurfing, water-skiing and jetskiing. All will be aimed at encouraging and making it easy for people to enjoy a personal challenge or just try something new.

### NEW MARKET 4 – SEASIDE CHIC

This market is the young, free, singles who enjoy events and festivals, exploring trendy places, clubbing, cappuccinos and travelling for the buzz of something new. They will enjoy the Riviera for its continental feel, huge range of eateries and entertainment and as a touring base for wider exploration.

### NEW MARKET DEVELOPMENT – OVERSEAS CONSUMER

We will work closely and consistently with DACOM, to attract visitors from both traditional and new segments. We will particularly focus on countries with opportunity for growth, which include France, Germany, Holland, Belgium, Scandinavia and North America.

We will:

- ensure that promotions are in place to support and maintain core markets
- produce annually the mechanisms to raise the profile of the English Riviera with the chosen market segments
- ensure that these mechanisms meet the needs of the customer and responds to their requirements, whether this be in the form of a traditional guides and leaflets, publications aimed at key segments, DVD / CD-ROM / online
- continually review the media we utilise to attract leads and generate interest in the resort
- develop and implement campaigns aimed at delivering measurable responses and strong conversion to bookings through the above mechanism
- enhance consumer convenience and 'bookability' by developing packages and products which will appeal to the selected market segments
- promote the English Riviera by highlighting key strengths and distinctiveness – water-based activities, beaches, produce and activities



We will encourage others to:

- consider the markets in which they can have the most impact, and focus on developing their product to meet the needs of these markets
- support the above activity to maximise impact and minimise duplication
- support the development of packages and booking mechanisms
- identify partners to develop tailor made packages

### PRESS AND PR

The TDA, working with an external PR agency, will raise the profile of Torbay as a destination of choice, with an emphasis on attracting new customers and maintaining the highest profile regionally, nationally and internationally.

The TDA will develop its role of promoting the use of Torbay locations in Film and TV, working with partners including South West Screen and the Local Authority Film Friendly Steering Group.

We will:

- Aim to attract over 50 journalist visits to Torbay per year
- Aim to receive coverage in all major mass media and travel media to the value of over £1million per year
- Position Torbay and the English Riviera as a leading resort through media which is relevant to the targeted market segments, both nationally and internationally
- Ensure that positive PR raises and maintains a positive perception of Torbay, and use research to monitor effectiveness
- Generate enquiries for film and TV location work and service requirements of crews

We will encourage others to:

- adopt a unified approach to press and PR, channelling all energies in a cohesive and co-ordinated fashion, ensuring Torbay has one, pro-active and focused voice with external media
- consider the positive and negative impact of PR, and our responses to stories and to work to ensure that a positive approach is taken at all times
- support itineraries and stories, and offer opportunities to maximise external publicity
- support journalist visits through complimentary rooms, meals, visits, and most importantly, meet, greet and hosting; ensuring the skills and expertise from the industry in Torbay is utilised with external visitors

### BUSINESS SUPPORT AND COMMUNICATION

The TDA will engage with and work closely to co-ordinate the local industry. There will be regular tourism forums, e-news and front of house familiarisation visits, connecting hospitality and attractions.

We will work strategically and engage with all tourism groups, including the Torbay Hospitality Association, English Riviera Association of Tourism and other relevant organisations representing tourism in Torbay. We will also exploit our regional and national networks to ensure that Torbay is at the forefront of tourism development and promotion in the UK.

We will:

- hold regular Tourism Forums and individual workshops to launch specific products and initiatives
- offer training and support for new and improving businesses through strong links with relevant business support agencies
- circulate a monthly email newsletter, and encourage the industry to use the members section of the website to update themselves on key actions within the English Riviera Tourist Board
- publish two printed bulletins in April and October

We will encourage others to:

- use the above mechanisms to share best practice
- involve the TDA in all tourism-relevant issues/forums
- work closely with Enterprise South Devon and Business Link to ensure continual improvement and development

### QUALITY AND SERVICE DELIVERY

The TDA will also raise the importance of the quality /of the destination and the service provided.

The English Riviera currently supports an inspected only policy in official tourist board guides and information. The TDA will implement the more comprehensive 'Quality in Torbay' standard, and support the local industry to embrace this approach. By 2010 the TDA will promote 'quality first', leading to quality only by 2015 – in line with the aspirations of the South West Tourism strategy.

Quality in Torbay will be a comprehensive quality programme aimed at all businesses operating in the tourism sector and addressing the following core elements of a quality experience:

- customer care
- staff and organisational development
- facilities and services offered (based on existing stars and diamonds schemes)
- accessibility (DDA)
- sustainable business operation (VICE sustainable for the Visitor, the Industry, the Community and the Environment)
- training and development
- security and personal safety (safer communities)

We will:

- bid for funds to support the local industry to adopt the Quality in Torbay standard
- raise the profile of, and actively promote those partners working towards the standard
- run the annual English Riviera Quality Awards as a celebration of industry successes
- support Enterprise South Devon and the Crystal Palm Awards

We will encourage others to:

- adopt and promote these new standards
- work towards achieving higher standards in product delivery and customer service
- take part in the English Riviera Quality Awards
- take part in the Crystal Palm Awards





## Summary

Despite a growth in the global and national tourism industry, Torbay faces many significant challenges in aiming to maintain and grow the volume and value of its tourism sector. The potential of Torbay can only be realised through focused, partnership working; the success of this strategy is wholly dependent on a partnership approach with all tourism related bodies and organisations – only by working together will Torbay’s tourism industry evolve and thrive.

The customer shall be the final judge of success and every business and individual in the sector must be striving to meet and exceed their expectations.

The destination’s product must be continually monitored, challenged and improved, through internal and external benchmarks. The quality of every aspect of the holiday experience from the first perception of the resort and friendliness of the welcome through the enjoyment of a quality range of products and services to the follow up after the holiday can and must improve.

All tourism businesses and all agencies involved in public realm or public service delivery must seize this opportunity to ensure a sustainable and prosperous future for the English Riviera.



Elephant Restaurant



Paignton Zoo



English Riviera Quality Awards (2004)



Group Leisure Industry Awards (2004)



## Appendices

### A ENGLISH RIVIERA TOURISM TRENDS

September 2004

#### 1 INTRODUCTION

The English Riviera Tourist Board is part of the Torbay Development Agency, a public private partnership working with Torbay Council to deliver tourism, business support, regeneration and marine services. The tourism business plan and emerging Torbay Tourism Strategy are dependent on solid research. This report summarises that research.

#### 2 SOURCES OF INFORMATION

AREA	TITLE	FREQUENCY	METHODOLOGY
National	United Kingdom Tourism Survey (UKTS)	Annual	Various
Regional	South West Tourism – Facts of Tourism	Annual	Various
Regional	Economic Impact of Tourism	Biannual	“Cambridge” economic model
County – Devon	Devon Tourism Trends – Devon wide statistics	Annual	Returns from majority of accommodation providers
District – Torbay	Devon Tourism Trends – district statistics	Annual	Returns from majority of accommodation providers
District – Torbay	TIC Performance	Annual	Mystery shopper
National	DPUK	Annual	Destination performance benchmarking
	Visitor Survey	2003 (3 yearly)	400 street interviews in Torbay. Benchmarked against other destinations
	Visitor Profiling	2004	Postcode analysis or response databases
	Campaign responses (cost per response)	Annual (ongoing)	Source of enquiry recorded at brochure fulfilment house
	Campaign Conversion	2002 (3 yearly)	400 telephone interviews with guide requesters. Benchmarked against other destinations



**3 VOLUME AND VALUE OF TOURISM**

The only accurate measure of actual visitors is provided by the analysis of business carried out for the English Riviera Tourist Board by Devon County Council as part of a Devon wide service. This measures total bedspaces, tourist nights, seasonal capacity, occupancy levels and visits to attractions. There is no accurate measure of the number of holidaymakers. Using two alternative methodologies the figure can be calculated as 1.71m (SWT/Cambridge) and 1.12m (Devon Tourism Trends/ERTB visitor survey). Therefore the number of staying visitors is estimated as 1.41million. (The significant difference is explained by Torbay’s relatively long length of stay as compared with that used in the economic model.)

Key Facts for English Riviera 2003 Volume of Tourism:

- Capacity in bedspaces: 48,410
- Tourist nights: 8,470,000
- Staying tourists: 1,410,000
- Day visitors: 3,795,000

SW Tourism “Value of Tourism to the SW Economy 2001” uses the Cambridge economic model to match local statistics with national research findings to estimate the economic impact of tourism.

Key Facts for English Riviera 2001 Value of Tourism:

- Spend by staying visitors: £330,175,000
- Spend by day visitors: £92,476,000
- Other tourism related spend: £19,150,000
- Total spend: £441,801
- Jobs related to tourism spend: 16,905
- Employment supported by tourism: 32%

**Summary point 1: The English Riviera attracts substantial numbers of visitors and the sector represents a very significant proportion of the area’s jobs and industry.**

**4 PROFILE OF VISITORS**

AGE: %	2003	1999	1996
16-24	2	3	5
25-34	9	10	18
35-44	10	14	20
45-54	16	20	23
55-64	24	23	19
65+	39	30	16

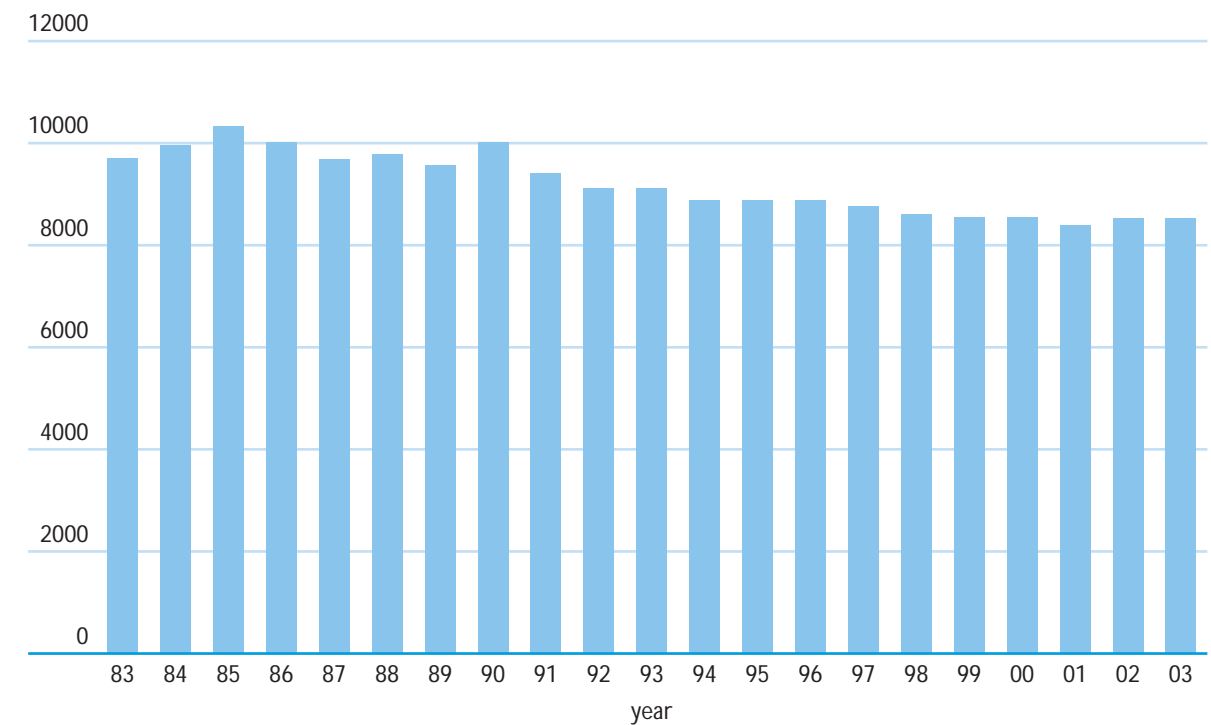
SOCIODEMOGRAPHIC: %	2003	1999	1996
AB	7	29	26
C1	29	16	12
C2	22	34	39
DE	37	18	18

**Summary Point 2: The English Riviera’s visitor profile is slowly becoming older and more down market – a market that is likely to decline in both volume and value.**

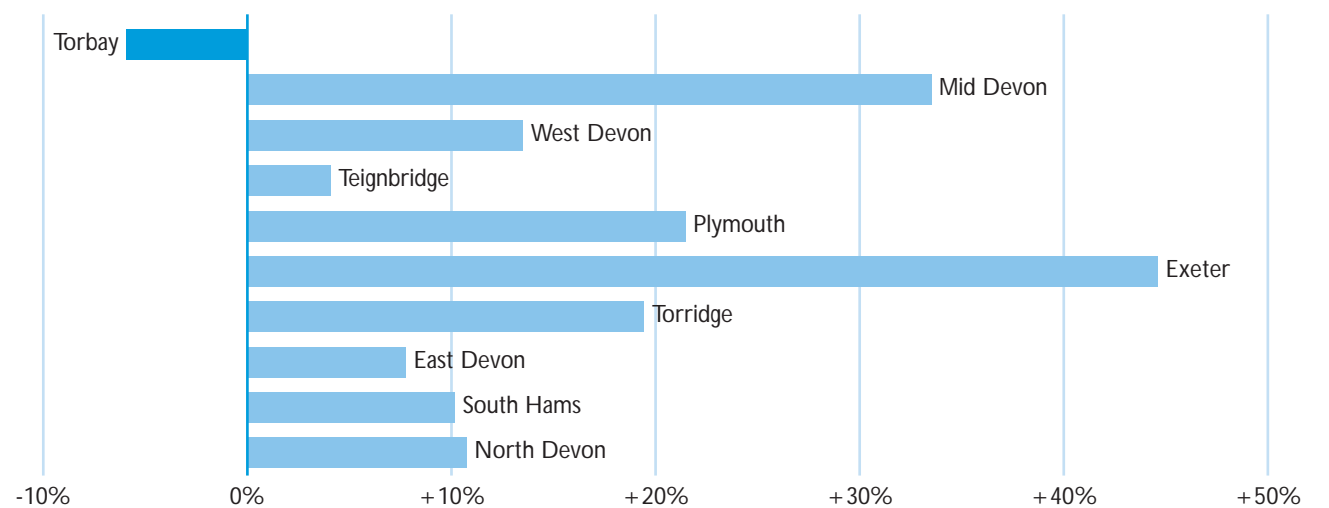
**5 GROWTH COMPARISONS**

Following substantial decline from a peak of 12.7 million tourist nights in the 1970s, the English Riviera has seen a general slow decline in visitor numbers through the 1980s and 1990s. 2002 showed the first increase since 1990.

ENGLISH RIVIERA TOURIST NIGHTS 1984–2003



PERCENTAGE CHANGE IN TOURIST NIGHTS BY DISTRICT 1999–2002



However, when these figures are compared with those of other Devon districts the picture becomes more alarming.

**Summary Point 3: Torbay is the only district in Devon to show a decline in tourist nights during the last decade.**





LENGTH OF STAY

This statistic is available from the English Riviera Visitor Survey. National trends show significant growth in short break holidays. Although the English Riviera appears to have done extremely well in maintaining a long length of stay this is a double edged sword which also suggest that the resort is failing to attract visitors in the high growth/high value short break markets.

Length of stay

1996	6.9 nights
1999	6.3 nights
2003	7.6 nights

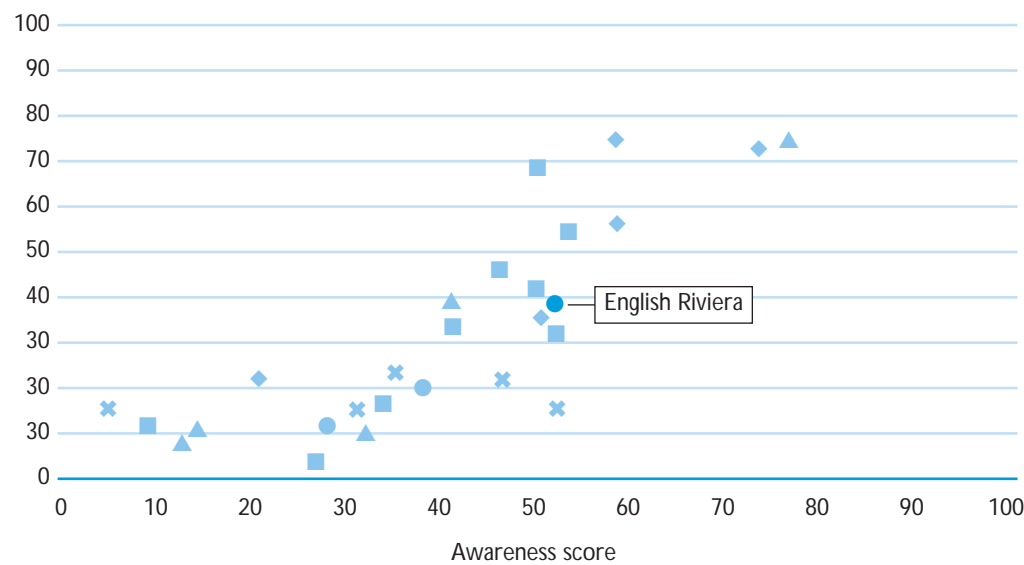
**Summary Point 4: The resort is failing to attract market segments with strong growth potential.**

6 ENGLISH RIVIERA PERCEPTIONS

INTEREST AND AWARENESS:

A limited piece of research to measure the interest and awareness of various destination brands within the South West (2001) showed that 51% of the sample were aware of the English Riviera as a destination and that 39% were interested in its product. Top performing brands were Devon, Cornwall, Southwest, and Westcountry. Poorest performing brands were Jurassic Coast, Mendips, Wessex and Forest of Dean.

SW DESTINATIONS – AWARENESS AND INTEREST



VISITOR OPINIONS:

In the Resorts 2003 Visitor Survey, visitors rated Torbay highly in terms of the visitor experience offered. They particularly liked the scenery and relaxing atmosphere. Almost 62% were “very likely” to recommend Torbay as a place to visit. On the whole opinion scores improved from the 1999 survey levels. Negative issues were cost and ease of parking, value for money, places to eat and drink, display maps and information boards, availability and cleanliness of toilets and a feeling of safety from traffic.

WIDER PERCEPTIONS:

Notes from other research sources including non-visitors research

POSITIVE PERCEPTIONS:

- Continental feel
- Sophisticated
- Difference from other resorts
- Beautiful bay
- Good beaches
- Memories of childhood beach holidays
- Highest awareness of Torquay
- Friendly and relaxing
- Warm and sunny

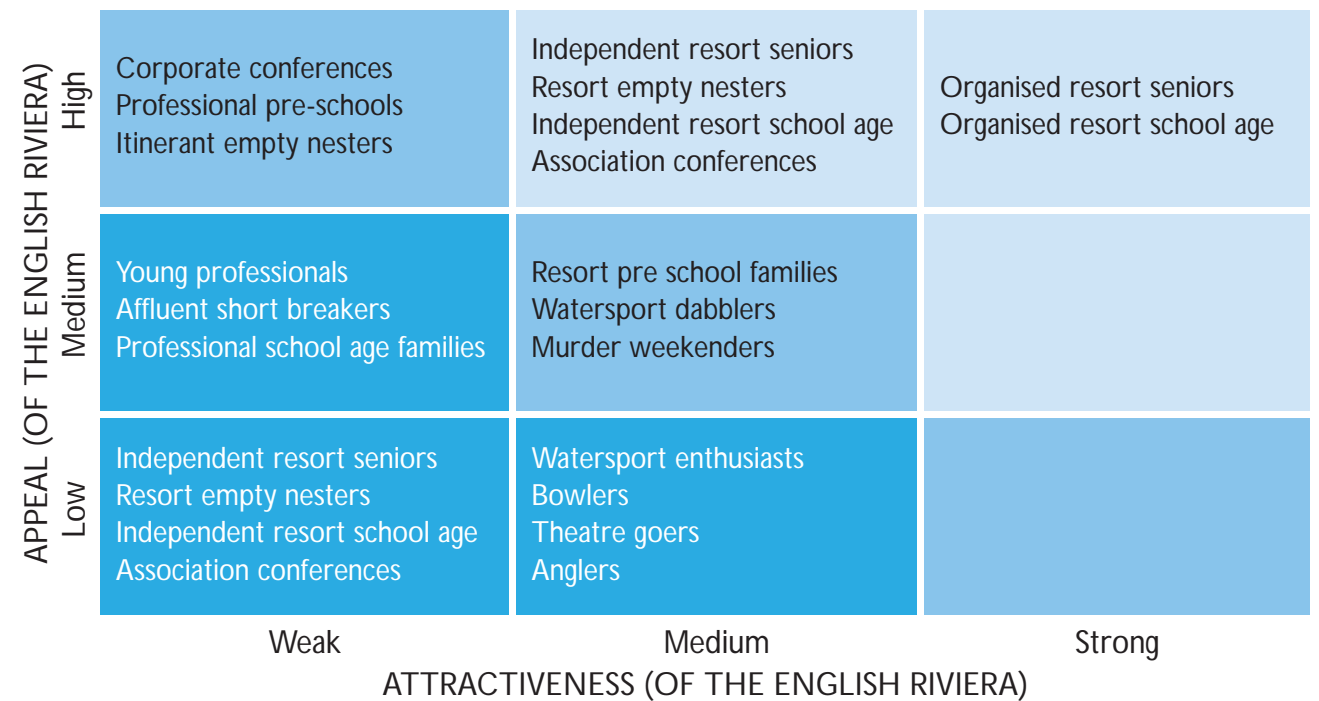
NEGATIVE PERCEPTIONS:

- Retirement area
- Horrendous traffic
- Down market
- Bucket and spade
- Run down
- Tacky
- Stag weekends
- Old fashioned

**Summary Point 5: Visitor opinions are largely good however, wider perceptions within relevant target markets highlight the need for better marketing.**

7 FUTURE OPPORTUNITY

A detailed analysis of the English Riviera's current visitors was carried out in 2004 and used market segmentation to priorities future marketing and product development efforts for the resort as follows:



■ High priority    ■ Medium priority    ■ Low priority

**Summary Point 6: There is the potential to invest in building business from emerging markets whilst safeguarding the resort's core markets.**



**B TORBAY DEVELOPMENT AGENCY**

A public private partnership working with Torbay Council to deliver tourism, business support, regeneration and marine services.

**OUR VISION**

- To stimulate the development of a prosperous economy and create increased employment in Torbay for a more sustainable future.

**OUR GOALS**

- Create and manage development projects to regenerate key areas in each of the three Torbay towns in the interests of tourism attraction, commercial opportunity, quality of life for residents and civic pride.
- Create workspace of appropriate size, type and location to permit expansion of a diversified business base within the Torbay area. Stimulate the creation and development of businesses offering improved job opportunities, particularly full-time, sustainable and high value jobs.
- Develop business support measures and organisations to stimulate an entrepreneurial culture, the creation of new businesses and the high growth of appropriate existing businesses.
- Facilitate the development of working relationships between further education colleges and schools and the business community in order to enhance the perceived opportunities for young people in the Torbay area.
- Develop our national and international marketing strategy for tourism to enhance the appeal to higher spending tourists in parallel with the improvement in the Torbay “product” for all visitors through regeneration projects.
- In support of tourism provide the infrastructure and resource to expand events and attractions. Promote expansion of the tourist season by these means.
- Develop tourism research to further identify and quantify tourist motivation.
- Develop a programme of training, customer focus and related quality assurance for all Torbay businesses but particularly those associated with tourism.
- Promote the bay itself as the unique selling proposition for Torbay through the use of its waters, harbours and waterfronts.
- Work with the fishing industry to develop a strategy for sustainable development including the regeneration of the fishing infrastructure as needed.
- Promote the improvement of access to the Torbay area via liaison with all transportation authorities including Exeter airport.
- Develop a working relationship with community representation in order to integrate project development with local community needs.

**C TOURISM AND RELATED BODIES THAT WILL LINK WITH THIS STRATEGY AND ACTIONS WITHIN IT:****NATIONAL AND REGIONAL**

- VisitBritain
- British Resorts Association
- UK Destination Benchmarking Group
- South West Tourism
- Devon County Economic Development team and Devon Tourism Officers Group
- Devon and Cornwall Overseas Marketing
- Destination South West (cruise)

**TORBAY**

- English Riviera Association of Tourism
- Torbay Hospitality Association
- Local Strategic Partnership and strategic forums
- Torbay Council
- Torquay Town Team
- Paignton Town Team
- Brixham Town Team
- Torbay Business Forum
- Torbay Coast and Countryside Trust

**OTHER**

- South West Screen
- Confederation of Passenger Transport
- Tourism Skills Network
- Torbay Business Bureau partners





## D TOURISM IN TORBAY - SUMMARY OF STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS FACING THE SECTOR

### STRENGTHS

- The natural resource features of Torbay including coastline, beaches, parks, countryside and the Torbay palm trees
- Substantial holiday accommodation resource
- Significant quality achievements to date
- Quality visitor attractions – many open all year
- Significant heritage sites
- Strength of the English Riviera brand
- Mild micro-climate (and perceptions of)
- The diversity and distinctiveness of the three towns
- Excellent location within the region as a touring centre
- Transport accessibility – substantial catchment of UK population centres
- Strong ERTB core promotions and strong trade support for these promotions

### WEAKNESSES

- Public sector facilities management (litter, car-parking and toilets) and public perceptions of
- Drunks / beggars
- Lack of comprehensive alcohol management process
- Kingskerswell bypass – lack of
- Not all of tourism and related sectors engaging in the quality agenda
- Regional airlinks (domestic and overseas) still developing
- Lack of new and innovative tourism businesses
- The fundamental seasonality of the industry
- Complex trade structures and sometimes conflicting strategies
- Diversity of the tourism product and therefore wide ranging markets
- Lack of an event development strategy

### OPPORTUNITIES

- Newly formed Torbay Development Agency and co-ordinated approach to tourism and economic development
- Growth in UK short breaks – opportunity to reduce seasonality and enhance sustainability
- A proactive approach by the ERTB in building new markets
- A proactive approach by the ERTB in attracting positive PR and film location exposure
- Build private sector support for new initiatives

### THREATS

- Competition from other resorts and destinations both within the UK and overseas
- Ecommerce placing bookability before destination selection
- Regional strategy under development and therefore an unresolved strategic framework
- Poor weather
- Potential disasters, eg. oil slick
- Continued or substantial decline in accommodation stock
- Service cuts or reductions

## E CONSULTATION PROGRAMME AND RESPONSES

The first Draft Tourism Strategy was launched in October 2004, at the English Riviera Tourism Forum; copies were available to attendees and non-attendees, via the website and also through the main tourism associations in Torbay. The first consultation period ran from October–December 2004, and was profiled in the Herald Express and via tourism groups and industry bodies.

Overall, from the initial consultation questionnaires relating to the first draft strategy, the local tourism industry reported:

### SECTION ONE: THE CURRENT POSITION

88% of responses supported either strongly agreed or agreed that this section accurately outlined the current tourism position in Torbay. (The remainder neither agreed nor disagreed, or did not respond)

### SECTION TWO: THE FUTURE POTENTIAL

81% of responses believed (strongly agreed / agreed) that the section accurately reflected the future potential of tourism in Torbay. (3 non-responses)

### SECTION THREE: STRATEGY FOR SUSTAINABLE AND PROFITABLE FUTURE

#### WORKING STRATEGICALLY

88% of responses agreed/strongly agreed with this core principal. No one disagreed with this statement. (The remainder neither agreed nor disagreed, or did not respond)

#### WORKING PARTNERSHIP

88% of responses agreed/strongly agreed with this principal. (The remainder neither agreed nor disagreed, or did not respond)

#### RAISING THE GAME

88% of responses agreed/strongly agreed that this core principal was essential for a sustainable and profitable future. However, one response who strongly Disagreed with the statement, and there was one non-response.

#### ADDRESSING NEGATIVES

88% of responses agreed/strongly agreed. (The remainder neither agreed nor disagreed, or did not respond)

#### SUSTAINABILITY

88% of responses agreed/strongly agreed. (The remainder neither agreed nor disagreed, or did not respond)

#### ATTRACTING NEW CUSTOMERS

94% of responses agreed/strongly agreed that this was an important core principal to the strategy. (The remainder neither agreed nor disagreed, or did not respond)

#### THE LOCAL TOURIST

87% of responses believed that the Local Tourist was an important principal to the strategy. (The remainder neither agreed nor disagreed, or did not respond)



**SECTION FOUR: THE KEY ACTIONS****STRATEGY AND POLICY**

88% of responses were in support. (The remainder neither agreed nor disagreed, or did not respond)

**RESEARCH**

88% of responses were in support. (The remainder neither agreed nor disagreed, or did not respond)

**PRODUCT AND INFRASTRUCTURE DEVELOPMENT**

88% agreed/strongly agreed. (The remainder neither agreed nor disagreed, or did not respond)

**PROMOTION**

75% agreed/strongly agreed with this main pillar of the action plan. (The remainder neither agreed nor disagreed, or did not respond)

**PRESS AND PR**

81% agreed/strongly agreed with this idea. However, one response who strongly Disagreed with the statement, and there were 2 non-responses.

**BUSINESS SUPPORT AND COMMUNICATION**

88% of responses agreed/strongly agreed. (The remainder neither agreed nor disagreed, or did not respond)

**QUALITY AND SERVICE DELIVERY**

88% of responses agreed/strongly agreed. (The remainder neither agreed nor disagreed, or did not respond)

Specific comments were received from a number of businesses and their points are reflected in the second draft, and a number of questionnaires were received without comments.

Consultees with specific comments on the first draft strategy included:

Beecroft Hotel, Belgrave Hotel, Benbows Hotel, Cary Court Hotel, Coast and Countryside Trust, Devon School of English, Fairways Guest House, Glenwood Hotel, Hoopers Hotel, Patricia Julie Court Apartments, Pavilion Shopping Centre, Riviera International Conference Centre, Sharon Guest House, TLH Leisure Resort, Torbay Council – Culture, Torbay Council – Strategic planning

The second Draft Tourism Strategy was updated following the comments received, and the second consultation period (1 February–1 March) shaped the final version. Further comments were received from:

**THE ENGLISH RIVIERA ASSOCIATION OF TOURISM**

It would be impossible not to agree / strongly agree with each section in this strategy document. The successful delivery of this 10 year strategy will depend crucially on the strength of committed public and private sector partnership working. We believe it is essential a strong partnership is formed with clear lines of communication, clear targets and joint decision making. The desire to drive up both the quality of the resort and the businesses within it, in order to exceed future visitors expectations, is something ERAT wholeheartedly shares. ERAT is committed to partnership working and we look forward to playing an active part in achieving the goals of this strategy document.

**THE SOUTH WEST REGIONAL DEVELOPMENT AGENCY**

A joint response from the RDA Tourism Consultant and the Devon Area team was received, which covered concerns relating to South West Tourism and the DMO structure, infrastructure development and marketing; all of which have been reflected in the final document.

**THE TORBAY HOSPITALITY ASSOCIATION**

The Executive of the Torbay Hospitality Association responded on behalf of their membership. Their responses either agreed or strongly agreed with all of the core principles of the strategy. Concerns that were raised relating to Product and Infrastructure Development, and Quality and Service Delivery. These concerns underpinned the need to maintain a national inspection system, and not encourage local inspections and also to ensure that infrastructure development matched the requirements of visitors and industry. These comments are reflected in the final version of the Tourism Strategy.

**THE TORBAY DEVELOPMENT AGENCY**

Responses were received from the TDA Directors, all of their comments have been noted and included in the final version.

Peter Bushell, Chair of the Torbay Business Forum, Director of the Torbay Development Agency (Brixham Co-operative Society Limited)

'I would hope to see a rejuvenated Torbay Business Forum playing a central role in communication between the wider business sector and the TDA'

Barry Cole, Director of Torbay Development Agency (Riviera International Centre)

Carol Smith, Director of Torbay Development Agency (Belgrave Hotel)

Torbay Hospitality Association

The need for a clear vision which sets the way forward is required to introduce the strategy and the TDAL board will develop this vision.

A strategic tourism group will be called to assist in developing an annual action plan, which will be monitored by the Board of the Torbay Development Agency.

