



TORBAY DEVELOPMENT AGENCY



Turning the Tide for Tourism in Torbay

Executive Summary



The English Riviera faces a challenging future. For the past two decades the destination has experienced a gradual but persistent decline in the value and volume of tourism. From 2005 to 2007 staying domestic visitor numbers reduced a further 22% and average durations reduced to 4 nights. The only areas of growth relate to the numbers of day visitors.

During the past two decades there has been a dynamic globalisation of the tourism industry, combined with a revolution in consumer expectations, communications and patterns of holiday taking. To understand the impacts on the resort this strategy is underpinned by extensive consultation with over 300 stakeholders across the private and public sector locally, regionally and nationally taking part. In addition primary visitor research was commissioned amongst visitors over Easter 2009 and non visitors living in target market areas to identify the reasons why they do not currently visit the English Riviera.

Industry consultation highlighted:

- commitment to the success of this strategy
- frustration regarding current tourism management
- challenging times in respect of business operations

Easter visitor survey key findings:

- 75% of visitors planning to return
- more positive than negative comments about the destination
- less than 25% had visited the Tourist Information Centres
- appeal of the South Devon hinterland to explore

Non visitor survey key findings:

- awareness of the English Riviera brand name
- mixed perceptions and appeal of Torquay and Paignton
- very little awareness of Brixham
- increasing requirement for modern quality accommodation
- extensive use of the internet to research and book holidays

These findings highlight that the English Riviera has not kept up with the pace of change. Commitment from stakeholders however highlights that most are ready to face the challenges and achieve the objectives.

Key Objectives

This strategy has three key objectives at its core:

- to arrest the decline in visitor numbers and spend
- to increase the value of tourism to the Torbay economy
- to reposition the English Riviera as a leading and inspirational UK destination

Key Challenges

Moving forward the following key challenges have been identified:

- increasing competition
- continuing worldwide recession
- continuing decline in the appeal of traditional seaside resorts
- reducing durations negatively impacting total visitor spend

- attracting new visitors

Vision for the English Riviera

The long term vision is for the English Riviera to become an all year round sustainable visitor destination that will regain its place as one of the top UK resorts. A longer season will result in reduced seasonal employment, a better developed workforce and increased investment.

Strategic Priorities

To achieve the key objectives and vision the following have been identified as strategic priorities:

- development of a year round destination providing year round employment
- delivery of world class service through investment in skills training of local people
- provision of visitor focused, market trend led product development
- need to attract new visitors from a broader market profile
- need to work in partnership to achieve greatest efficiencies

The Destination

Situated in South Devon the English Riviera is made up of 22 miles of attractive coastline, including part of the South West Coast path. It has 18 sandy beaches and a unique horseshoe bay which is seen as a major asset for rejuvenating the destination.

Moving forward investment and product development for Torquay is seen as a priority in order to neutralise the mixed negative perceptions that the town still has amongst non visitors in particular. Opportunities focusing on: maritime leisure, conference and business, events, exhibitions and festivals, including Agatha Christie have been highlighted.

Paignton continues to live in the shadow of Torquay and is continuing to receive mixed perceptions. Moving forward it is recommended that Paignton should focus on nostalgic family fun linking to watersport development, beach life, festivals and events.

Brixham is the least well known town but offers great potential in attracting a broader profile of visitors with its authentic harbour, maritime heritage, natural landscape for walking and the growing demand for fresh local fish and seafood.

Supporting the above areas the special characteristics of Babbacombe and Cockington are highlighted and the additional strength they bring to the English Riviera brand.

Accommodation Planning for Tourism

With a capacity of 18,500 tourist beds (Devon Trends 2007) the English Riviera remains the major dormitory for the county. However to ensure that the Riviera achieves the objectives we have sought to review current holiday accommodation and to forecast holiday accommodation needs to 2026, to coincide with the adoption of the revised Local Development Framework and taking into consideration the Regional Spatial Strategy.

Research has highlighted various imbalances in the current holiday accommodation portfolio and in particular the significant over supply of 4-10 bedroom guest accommodation compared to visitor demand.

The following key recommendations are made:

- need to fill the accommodation product gaps to attract the target markets
- notable reduction in 4 to 10 bedroom guest accommodation
- small increase in 3 and 4 star hotel accommodation
- small reduction in Holiday Park accommodation

Planning policies will be revised to accommodate the recommendations through the adoption of:

- reduction in PHHAs to enable change of use within the 4 to 10 bedroom category
- introduction of new Core Tourism Development Areas aligning to the Mayor's Vision
- adoption of new viability test to protect best holiday accommodation across Torbay
- measures to protect the Riviera from an increase in Houses in Multiple Occupation as uses change

Product Development

Increasing visitor destination competition means more than ever before there is the need to be creative with product development and to promote compelling visitor experiences that keep the British holiday an attractive proposition. Successful product development can create compelling reasons to visit enhancing core product with themed and experiential packages, combining accommodation, attractions, festivals and events becoming increasingly popular.

There is a need to continually evaluate market trends and ensure there is the product and infrastructure to support these needs. The natural assets of the Bay were clearly identified as the English Riviera's Unique Selling Point and is seen as representing the major product development and repositioning opportunity for the future.

The legacy of Agatha Christie and Global Geopark status also offer unique reasons to visit the English Riviera and needs themed and experiential packages developed around them.

Flagship products are needed to help increase brand equity and the value of tourism to the economy. Continued inward investment will prove crucial aligning to the Mayor's Vision.

The development of the following five themes have been identified as offering maximum potential:

- Agatha Christie legacy
- business tourism
- events and festivals
- Global Geopark Status
- maritime leisure

Maritime Leisure

Tor Bay has the potential to be a worldwide 'icon' in terms of water-based activities. It is a deeply indented, sizeable bay, sheltered from the prevailing winds, featuring excellent harbours, outstanding scenery, gentle tides and uncrowded waters. This natural asset is currently insufficiently integrated into the broader visitor experience and economy.

The Bay presents a fresh approach and the opportunity to broaden the English Riviera's current market profile through the development of:

- maritime centre of excellence
- "Torbay" week as a key event
- themed breaks and offers linked to events

Business tourism

The effective development of business tourism with its mid week and shoulder season booking pattern is essential in making the English Riviera a year round, more profitable destination. The English Riviera has the potential to expand its appeal for national and international business and conference events.

The following have been identified as priorities to enable growth:

- establish a business tourism action group to act as a catalyst for growth
- integrate role of Conference Torquay into central destination marketing activity
- develop compelling business tourism 'experiences' including unusual venues and water activities to attract new conference business
- protect the provision of a minimum 1000 seater conference facility

Global Geo Park

The English Riviera Geo Park should be seen as Devon's newest iconic visitor attraction. It is considered to be a sleeping giant. Positioned and promoted creatively Geo Park status offers enormous potential to attract new visitors to the English Riviera from all over the world.

The following have been identified as priorities to enable growth:

- clarity of meaning and benefits to the general public
- development of compelling short breaks combining the core growth themes (maritime leisure, business, events and Agatha Christie)
- bidding to host the 2012 Global Geopark Conference
- integration of Global Geopark into main stream destination marketing
- promotion of the Geopark by the language schools
- retention of Global Geopark status

Events, Festivals and Exhibitions

There is a great potential for the further development of events, festivals and exhibitions to attract new visitors and PR for the English Riviera.

The following have been identified as priorities to enable growth:

- establish an events, festivals and exhibitions product development action group
- clarify roles and responsibilities regarding management and promotion
- focus on fewer annual high profile events, festivals or exhibitions
- improve communications regarding event, festival and exhibition information
- enhance promotion of events, festivals and exhibitions on englishriviera.co.uk
- facilitate development of events, festivals and exhibition short break packages

Agatha Christie

Agatha Christie, and all the style that is related to her era, brings unique strength to the English Riviera brand. The opening of Greenway House by the National Trust in March 2009 has further strengthened her worldwide appeal.

The following key actions are recommended to enable growth:

- establish Agatha Christie tourism action group
- maximise potential through close relations with Agatha Christie Limited
- develop Agatha Christie Festival into major two week event
- maximise all PR opportunities particularly relating to any TV series
- produce multi-lingual promotional materials (particularly in Japanese)
- improve visitor interpretation in resort

Product Gaps

Research and consultation has highlighted a number of product gaps in the current English Riviera tourist product and services portfolio. Moving forward these need to be addressed if the key objectives and strategic priorities of this strategy are to be achieved.

Accommodation

- more national and international branded hotels
- spa, boutique and themed hotels
- quality inns and restaurants with rooms
- 5 star self catering including boat/yacht hire
- quality touring pitches providing hard standing

Attractions

- quality pedestrianised shopping
- national iconic attraction
- family farm attraction
- attractions visitor passport
- sufficiently large enough stage to accommodate big musicals/concerts

Events, Festivals and Exhibitions

- major summer festival
- major food festival

Food and drink

- availability of local Brixham fish
- al fresco waterfront restaurants and bars serving local produce
- quintessentially English eating houses such as tea rooms and ice cream parlours
- Michelin star restaurants and celebrity chef restaurants
- buy local food and drink campaigns (for both visitors and businesses to help reduce food miles and develop more sustainable supply chains) This gap has started to be addressed with the opening of Occombe Farm.

Transport

- lack of water based transport choices
- limited cycle hire and connectivity to Devon cycle path network

Quality

Raising quality is at the heart of regional and national tourism policy and must now be at the heart of English Riviera tourism policy. Everyone needs to embrace the fact that they are operating on an increasingly competitive world stage. Disappointing standards and service can harm a destination very quickly.

Everyone involved in providing a direct or indirect tourism service; accommodation, attractions, shops, transport, food and drink, entertainment, activities or any visitor service must appreciate the growing importance of the need to raise quality and embrace the need for ongoing skills training and personal and business development.

The following key actions are recommended to enable growth:

- introduce 'Best in the Bay campaign' through the adoption of a league table approach
- embrace and actively promote all nationally recognised quality accreditation schemes
- introduce an online visitor feedback mechanism to monitor visitor satisfaction levels
- use PR to celebrate everything positive relating to quality achievements
- appoint best practice industry sector champions to support fellow businesses
- encourage all tourism businesses to take part in quality training programmes

Sustainability (Responsible Tourism)

Sustainability is core to national tourism strategy and the promotion of 'green/responsible tourism' is becoming an increasingly significant motivating factor to visit the South West, which is a flagship for sustainable tourism development. Until now the English Riviera has been slow to recognise the benefits of promoting 'green/responsible tourism.' Achieving Global Geopark status provides a fresh opportunity to focus on sustainable tourism and to develop and promote new products to attract new visitors to the area.

Training and Business Development

Globalisation has resulted in ever changing and increasing customer expectations. To achieve the key objectives those working in the tourism industry must embrace these changes and commit to not only improving their own skills, their own staff and developing their own business but also commit to embracing the needs of their local community.

One of the roles of the new English Riviera Tourism Development Company (ERTC) will be to communicate and encourage participation in skills and training programmes including:

- national and regional accredited customer service training programmes
- local tourism and hospitality training programmes provided by South Devon College
- business development support available through Business Link and the Torbay Innovation Centres¹ to assist the development of compelling products and services
- specialist courses provided by the ERTC to help achieve the key objectives

¹ www.torbayinnovationcentres.co.uk

Visitor Services

Visitor Services is defined in the tourism industry as the provision of visitor information. The internet has revolutionised the way that visitors choose to access information and research has revealed that only 25% of visitors are currently using the English Riviera Tourist Information Service. Further research reveals that 60% of visitors now research information online and 30% book their accommodation online.

Effective dissemination of visitor information is of paramount importance in maximising visitor spending and the following key recommendations are made:

- expand the range of visitor information available on englishriviera.co.uk
- expand local outlets for the supply of information working in partnership with the public and private sector
- ensure a sustained approach to offering 'contact counter services'
- expand the call centre facility to become a central 'box office'

Marketing

A new, more dynamic marketing approach is needed in order to effectively communicate reasons to visit the English Riviera. The traditional marketing approach previously followed needs to be replaced with a marketing and PR campaign that recognises the power of the internet and places greater emphasis on online marketing.

The following key recommendations are made:

- improve the effectiveness of englishriviera.co.uk
- introduce online seasonal campaigns
- invest in high quality images
- explore opportunities for partnership marketing
- review value and effectiveness of offline traditional guide
- continued investment in market research

Public Relations

Increased prominence to the importance of PR is highlighted with the need for an effective PR and communications campaign to motivate people to visit the English Riviera.

The following key recommendation is made:

- transfer traditional media advertising budgets to enhanced PR activity.

English Riviera Brand

The rejuvenation of the English Riviera visitor brand is a priority. It currently has mixed perceptions, with low equity but a high awareness of the name. It has great potential to be redeveloped and repositioned as a compelling proposition for visitors. The destination's unique natural asset, the Bay, is the strongest single brand asset and should be central to future brand positioning

A provisional proposition of 'South Devon's Beautiful Bay,' supporting the English Riviera name has been identified, which could be used effectively to promote all aspects of the visitor offering.

Incorporating 'South Devon' into the proposition has positive benefits as 'south' is perceived as warm and sunny, and it also helps identify the location of the English Riviera. It also offers future visitor partnership marketing opportunities.

Tourism Management

Many different organisations are currently involved with tourism management and promotion. This fragmentation and division prevents the English Riviera punching its weight regionally and nationally and is having a negative impact on the development of the resort. In order to deliver the key objectives there is a need for a significant change in how tourism is managed.

To arrest the decline and rebuild the importance of tourism to its economy the English Riviera needs a highly focused approach. This can best be delivered through the launch of a new tourism organisation, which will provide strong leadership and the catalyst for the change that is considered necessary to provide effective destination management and marketing.

Led by the private sector, the new company will provide the platform for unification, focus and an increase in pace of delivery. A shared vision will be crucial to its success and the development of a positive culture that all stakeholders involved are committed to.

Closer regional alignment is recommended through securing mutually beneficial partnership workings with Visit Devon and Visit South Devon and full alignment to the evolving core objectives of Towards 2015, the Regional Strategic Tourism Strategy for the South West.

Transition

Transition and rejuvenation will be achieved through a refreshed approach focusing on key growth opportunities and integrated tourism planning and development that benefit the local community and visitors. All stakeholders will need to support this vision.

TOP 10 KEY ACTIONS:

1. Rejuvenate the English Riviera brand and everybody promote it
2. Establish 'growth action groups' for: Maritime Leisure, Global Geopark, Agatha Christie, events and festivals, business tourism
3. Address and fill product gaps
4. Maximise training opportunities for everyone in the tourism chain
5. Increase PR activity to raise destination awareness
6. Launch seasonal and 'Best in the Bay' online marketing campaigns
7. Establish Core Tourism Development Areas and revise supplementary planning policy
8. Establish the English Riviera Tourism Company
9. Develop effective relationships with regional/national partners
10. Invest in continued market research

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