



TORBAY DEVELOPMENT AGENCY



Turning the Tide for Tourism in Torbay

Strategy 2010 – 2015



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EXECUTIVE SUMMARY

Presented as separate document

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EVIDENCE BASE

Presented as separate document

1. THE CURRENT SITUATION

The English Riviera, despite experiencing an ongoing overall decline in its visitor economy attracted in 2007 (the most recent official statistics) in excess of one million staying visitors and two million day visitors and remains Devon's major resort. Total visitor spend was in excess of £438¹ million and 21% of the population was employed in the sector.

The following table shows trends since 2005 with decline particularly dramatic since 2005.

English Riviera Tourism Statistics and Value	% trend over 3 years	2007	2006	2005
Domestic Staying Visitors				
trips	- 16.2%	1,192,000	997,000	1,421,000
nights	- 22%	4,782,000	3,825,000	6,090,000
average durations	- 7%	4	3.8	4.3
sub total staying visitor value	- 4.7%	£290,332,000	£198,846,000	£304,551,000
Day Visitors				
trips	+6.1%	2,329,000	2,301,000	2,189,000
sub total day visitor value	+11%	£101,489,000	£97,720,000	£91,651,000
Overseas Staying Visitors				
trips	- 1%	104,200	102,600	105,300
nights	- 29%	585,300	714,600	824,300
average durations	- 38.5%	5.8	6.9	7.8
sub total OS visitor value	- 20.6%	£31,773,000	£33,144,000	£39,973,000
Additional Spend	+ 14%	£14,722,000	£14,176,000	£12,905,000

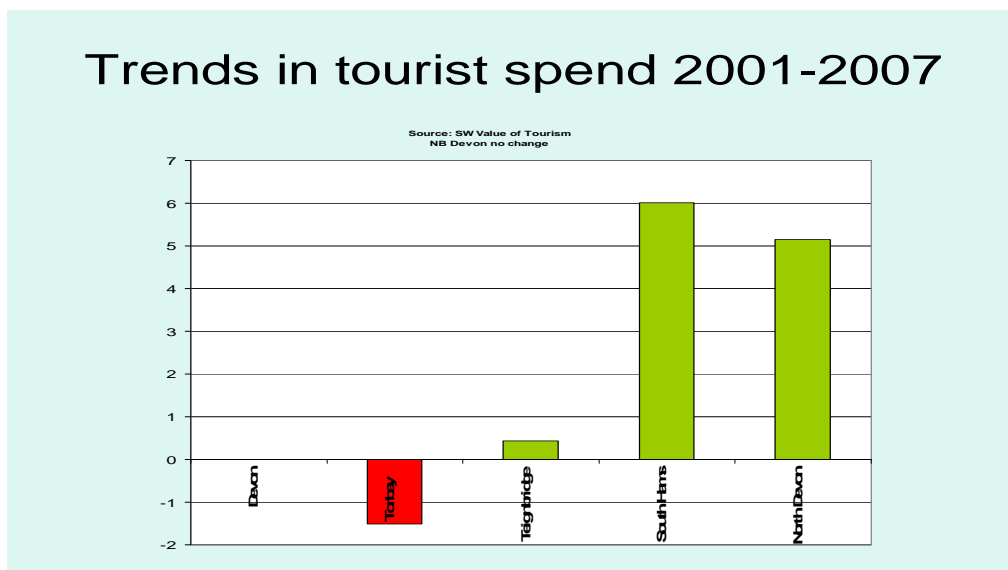
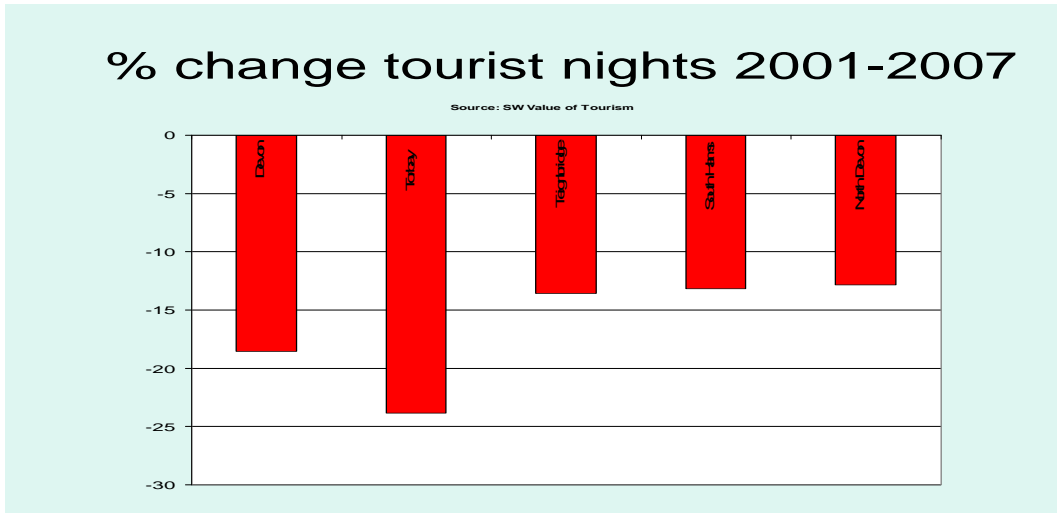
The English Riviera was one of the last bastions of the week-long holiday for the domestic market. This situation has changed quickly with the average domestic staying visitor duration in 2007 recorded as 4 nights. The English Riviera is becoming a shorter break destination but still has appeal for longer holidays in the high season.

This change has significant negative and positive implications:

- less time in the destination for visitors to spend money
- new opportunity for the English Riviera to put itself on the map as an inspiring year round coastal destination for short breaks

¹ South West Tourism – Value of Tourism 2007

The following tables highlight trends from 2001 to 2007. Worryingly for the destination trends in tourism spend are negative and the English Riviera is the only destination in Devon which displays an overall negative trend. This suggests that there are fundamental weaknesses with the current tourism offer in the destination.



Continued decline will mean that there will be less demand for all aspects of the tourism product including accommodation, attractions, transport, food and drink and related tourism provision including retail and professional services.

Key issues include:

- lower than average visitor spend compared to the rest of Devon
- continued market domination by C1, C2 and D families, over 60s and coach groups

Tourism Management and Promotion

Tourism in the English Riviera is currently managed and promoted in a very fragmented way with many private and public sector organisations involved. This is having a negative impact locally, regionally and nationally and the following particular problems have been highlighted:

- significant tension and sensitivities across the sector
- increasing frustration with the fragmentation
- confusion regarding roles and responsibilities
- unnecessary duplication of activities and reducing efficiencies

Current Tourism Strategy

The current Tourism in Torbay 2005-2015 strategy was published in 2005 by the Torbay Development Agency (TDA), with responsibility for delivery also sitting with the TDA through the English Riviera Tourist Board.

Key issues and challenges facing the tourism industry at that time were very similar to now with a continuing decline in visitor numbers, a dynamic market and increased competition.

Key priorities were identified as:

- increasing need to improve both customer service and quality
- increasing importance for partnership working.
- increasing need for product development
- increasing need to attract new customers

Key achievements as a result have been:

- gaining Global Geopark status
- Paignton Zoo refurbishment
- refurbishment of Torre Abbey
- opening of Occombe organic farm
- completion of the Torquay Waterfront regeneration programme including Beacon Quay and the Town Dock
- securing a license for a small casino which may assist a wider development

This revised strategy, 'Turning the Tide for Tourism in Torbay' will build on this success. Moving forward much greater emphasis needs to be placed on market led product development and modernising the current tourism offering.

2. THE DESTINATION

The English Riviera is made up of 22 miles of attractive coastline, including part of the South West Coast path and has 18 sandy beaches. 'The Bay' itself is considered to be a major asset and focal point for the repositioning of the English Riviera as an inspiring destination.



The English Riviera for many decades positioned itself as a traditional seaside destination which has resulted in the evolution of the destination and its legacy.

With research findings confirming mixed perceptions about the area it is crucial that the English Riviera neutralises negative perceptions in order to attract new visitors. To assist this neutralisation a revised repositioning is recommended through the adoption of a fresh strap line: 'The English Riviera, South Devon's beautiful bay'

The English Riviera is renowned for its seafront gardens, Victorian and Georgian architecture and has extensive areas of open green space including two country parks at Cockington and Berry Head. In addition it has the benefit of a rich heritage and a compelling hinterland including famous visitor hot spots: Dartmouth, Salcombe, Totnes and Dartmoor. These are all adding to the appeal of coming to stay on the English Riviera.

As a destination the English Riviera is made up of three key towns; Torquay, Paignton and Brixham plus additional individual areas with distinct characteristics such as Babbacombe and Cockington that bring notable strength to the brand.

Torquay

Torquay has always been the main resort on the English Riviera and continues to be so. The principal shaping of Torquay into the tourist destination as it is known today came about during Victorian times when it became one of the most renowned royal seaside spa resorts of the time. This era has left a fascinating and valuable architectural heritage that needs to be protected at the same time as moving the resort forward as a modern destination.

Torquay does have mixed perceptions. The non visitor research concluded that Torquay was perceived as having a classy past but an unclear present. Torquay is considered to be currently walking on a fine-line of sliding backwards or propelling itself forward. Because Torquay is seen as the major resort on the English Riviera it must be the priority for inward investment and product development in order to positively affect overall perceptions.

Torquay has the potential to be the South West's leading coastal resort for year round short breaks and is well placed to achieve this.

Product development should focus on the following themes in order to heighten and broaden its appeal and to give Torquay a clearly defined and more contemporary identity;

- harbour and maritime leisure
- quality restaurants, alfresco dining, café culture (not a 24 hour economy)
- provision of boutique style and spa hotels
- conference and business tourism
- major seasonal events/festivals per year
- the Agatha Christie legacy
- enhancing the Cockington link (carriages on the sea front)
- revitalisation of its retail offering

Paignton

Paignton has always been the English Riviera's main family resort and should continue to serve this core market and focus on enhancing and developing this theme.

There is currently a renaissance in visitors wanting to experience 'real' traditional seaside experiences as highlighted recently by Visit England. Nostalgic seaside fun is very much back in fashion. Paignton, with its long sandy beach and Victorian Pier is perfectly placed to

embrace this renaissance. Research highlighted that Paignton has mixed perceptions and there is a clear need to now focus on the provision of a quality visitor experience.

Product development should focus on the following in order to heighten its appeal and to give Paignton a clearly defined identity;

- nostalgic family fun, pier, amusements, Punch and Judy, ice cream parlours
- the beach and leisure water sports linking to Goodrington and Broadsands
- family packages combining accommodation and attractions (zoo breaks)
- regular festivals and events on the green

Brixham

Generations have been enchanted by the charm and romance of Brixham, a small colourful, quaint fishing port. When the BC1 non visitor focus groups were shown images of Brixham they found its characteristics very appealing highlighting its potential to develop as a fashionable place to stay.

Brixham has always been known for its fishing and should maximise the potential of this compelling theme and the increasing appeal for visitors to enjoy fresh seafood on the coast. This desire was highlighted in the non visitor research focus groups. Findings are presented in the Evidence Base.

To achieve this however Brixham must address its accommodation portfolio. There is a current lack of quality modern serviced and self catering accommodation and this is believed to be why its visitor economy continues to be dominated and reliant on day visitors.

Awareness is also an issue with Brixham almost unknown amongst the non visitor focus groups. This must be addressed and Brixham needs to embrace central destination marketing activity.

Product development should focus on the following in order to heighten its appeal and for Brixham to have a clear identity:

- provision of boutique hotels, quality self catering, restaurants and inns with rooms
- vibrant harbourside activities including arts and entertainment
- availability of fresh local seafood and great fish restaurants
- availability of authentic arts and crafts
- its position on a Global Geopark gateway (walking, exploring and maritime heritage)

Two key issues have to be addressed before tourism value can be increased, road access and parking. Both are considered to be major inhibiting factors and the need for faster water transport from Torquay is supported.

Babbacombe

Visitor research highlighted the specific appeal of Babbacombe and it is proposed that Babbacombe should be seen as a sub destination that currently brings and will continue to strengthen the English Riviera brand with development potential for:

- sea view dining and activities
- fantastic coastal walking
- promotion of unique attractions e.g. Victorian Cliff Railway

Cockington

Cockington is unique and presents a charming oasis representing quintessential England and has enormous nostalgic and emotional appeal. A hidden jewel of the English Riviera Cockington Village and its Craft Centre brings great strength to the brand with development potential for:

- greater integration with Torquay (carriage rides and Torbay Connected project)
- continuing events and festivals with an emphasis on Christmas
- enhanced demonstration crafts and shops through the Seachange project

3. ACCOMMODATION PLANNING FOR TOURISM

The provision and promotion of an accommodation portfolio that will help the English Riviera arrest the decline in its visitor economy and reposition itself as a leading and inspiring UK destination is crucial. Accommodation remains a key component of the overall product, an important motivating factor and significant provider of employment.

This strategy seeks to address the issue of tourist accommodation needs and spatial planning requirements in respect of informing Local Development Framework (LDF) and Regional Spatial Policy (RSS) up to 2026.

Moving forward there is the need to balance the needs of the visitor and local community in respect of:

- provision of adequate holiday accommodation
- provision of adequate homes for the local community

Current Situation

As a long standing seaside destination the English Riviera visitor accommodation portfolio has evolved in a traditional way and currently presents a mixture of accommodation choices including: serviced accommodation, flats and houses, holiday parks and touring pitches.

Changing expectations mean an increasing number of today's visitors want to spend their holidays in good value, high quality modern properties. The impact of this is that traditional seaside accommodation no longer has sufficient appeal to achieve the key objectives.

The table below summaries the total bed spaces as recorded in the different categories of accommodation in 2007.

Destination	Serviced	Flats and Houses	Holiday Parks	Touring Pitches	Destination Totals
Torquay	13,080	3,630	1,790	0	18,500
Paignton	4,820	3,070	5,800	4,380	18,070
Brixham	560	520	4,710	780	6,570
Category Totals	18,460	7,220	12,300	5,160	43,140

Source-Devon County Council Tourism Trends

The destination total has been in decline for a number of years with 51,500 bed spaces recorded as the destination total in 1999, a decline of 16.3% in one decade. The greatest losses have been in the serviced sector.

There is currently no central holiday accommodation master database available to measure exact levels of holiday accommodation. Forecast needs for accommodation have been based on official tourism trends and occupancy data available from Visit Britain, South West Tourism, Devon County Council and as a result of industry consultation.

A number of significant visitor trends should be noted from 2001 and 2007:

- overall decline in demand for serviced accommodation
- overall increase in demand for self catering accommodation
- consistent and growing demand for holiday park accommodation
- renewed increase in demand for touring pitches

Serviced Accommodation

Current Situation

18,400 serviced beds are currently recorded as being available, with 70% of this total (12,880 beds) estimated to be in the 4 to 10 bedroom category.

Research confirmed

- reduction in occupancy to an all time low of 27.5% in the 4 to 10 bedroom category
- growth in occupancy to 74.1% in the 51 to 100 bedroom category

Forecast need

- reduce bed spaces by a minimum of 3500, in the 4 to 10 bedroom category to address over supply
- increase bed spaces by a minimum of 400, in the 51-100 bedroom category to address under supply

Flats and Houses (Self Catering)

7,220 flats and houses were formally recorded as available for holiday accommodation in 2007. (Source: Devon County Council - Tourism Trends in Devon)

Forecast need

- increase number of self catering units by 1155 to a total of 8375

Holiday Parks

The English Riviera has 12,300 Holiday Park bed spaces officially recorded in 2007 Source 2. In the last 5 years a growth of 8% in numbers and a 22% in visitor spend has been recorded by leading UK operators at a national level and holiday parks now represent 17% of all domestic UK holidays. Source 4

Industry consultation identified the following trends:

- demand for basic chalet and caravan product in significant long term decline
- increased demand for premium caravan / lodge product
- increased demand for caravan holiday home ownership as second homes

Forecast need

10,000 bed spaces (2,000 units, based on 5 person occupancy)

Touring Pitches

The number of touring pitches in Devon reduced by 8% from 2001 to 2007. Over the corresponding period a loss of over 35% (2760 pitches) was recorded for the English Riviera.

Industry consultation highlighted a potential shortage in the number of touring pitches across the destination and in particular the provision of hard standing pitches for larger modern touring caravans and motor homes.

Forecast need

Retention of the existing 5934 pitches is recommended

Second Homes

The purchase of second homes has until recently been an increasing trend in the South West with their use in part as holiday accommodation. This trend is fuelling the increased supply of quality self catering holiday flats and houses and in turn the significant growth in visitor values in this category of accommodation.

Forecast need

Market forces will control the number of second homes made available but the long term forecast is further growth with the English Riviera's potential growing appeal.

Boat Moorings

Income generated from visitor from boat moorings increased from £109,000 to £917,000 between 2005 and 2007². This trend highlights the potential to grow maritime leisure with neighbouring areas netting four times the level achieved in 2007.

Forecast need

Marina capacities are now at full capacity and an increase in visitor boat moorings is required.

Language Schools

Language Schools present an important part of the visitor economy attracting students from all over the world and generating an income in excess of £8 million Source 1

Forecast need

² South West Tourism – Value of Tourism

All the time the language schools operate there will be a continued demand for hosting families with a particular demand for quintessentially English style accommodation.

Planning Policies for Tourism

Principal Holiday Accommodation Areas

Introduced in 1982, Torbay has protected very effectively its tourist accommodation through a policy known as the Principal Holiday Accommodation Areas (PHAAs). As a result the English Riviera has not suffered the rapid demise of many comparable destinations, which, without effective planning controls, lost all their quality holiday accommodation and the economic benefits that were previously enjoyed by tourism.

The PHAAs were last reviewed in 2000 and reduced in area by just fewer than 20% in terms of premises covered. As part of LDF preparation the PHAAs were assessed again in spring 2008 and the last monitor was conducted in August 2008 which identified a high number of vacancy signs at the time particularly amongst guest houses and bed and breakfasts.

The principal of the PHAAs is to prevent uncontrolled change of use of holiday accommodation and the following areas are currently designated as PHHAs:

TU6.1	Babbacombe Downs
TU6.2	Newton Road
TU6.3	Torre
TU6.4	Belgrave Road
TU6.5	Torwood Gardens
TU6.6	Meadfoot
TU6.7	Meadfoot Sea Road
TU6.8	Torbay Road
TU6.9	Preston Seafront
TU6.10	Paignton Seafront – North
TU6.11	Paignton Seafront – South
TU6.12	Roundham Road West
TU6.13	Roundham Road East

Since their adoption the PHAAs have been reviewed on a regular basis and were last reviewed as part of LDF preparation in spring 2008 and again in August 2008.

Core Tourism Development Areas

The adoption of new Core Tourism Development Areas is recommended to incorporate the most concentrated areas of holiday accommodation, located closest to the tourist projects identified in the Mayor's Vision:

Torquay Harbour
Princess Gardens and Royal Terrace
Paignton Seafront and Green Coastal Park
Goodrington Sands and Clennon Valley

Cockington Seachange Project
Brixham Harbour

Cluster developments such as this have been adopted very successfully in other leading UK resorts, including Bournemouth and present significant benefits including:

- enhanced holiday atmosphere and services for visitors
- increased footfall and visitor spend for shops, attractions and food and drink operators

The following key recommendations are made:

- robust review and reduction of PHAAs
- establishment of new Core Tourism Development Areas
- introduction of viability test to protect best accommodation across Torbay
- encouragement to fill identified product gaps
- encouragement to convert 4-10 accommodation to residential use/quality self catering
- preparation of planning document to mitigate against potential for Houses of Multiple Occupation (HMO) explosion
- release of old 'chalet' holiday park units

4. PRODUCT DEVELOPMENT

The English Riviera has operated as a major traditional seaside resort since Victorian times and its product has evolved from this. International competition is growing and there are some real challenges ahead in keeping the 'British tourism product' an attractive proposition.

Non visitor research highlighted that the current English Riviera tourism product (defined as: accommodation, attractions and visitor services) is perceived by many as lacking wow factor and is not considered compelling or modern enough to buy into.

More than ever before there is the need to be creative with product development so that the English Riviera starts to attract new customers through enhanced vibrancy and secures a long term sustainable future.

Product development needs to focus on developing opportunities that will attract year round, higher spending visitors to the Bay with a positive impact on the economy through increased employment, footfall and visitor spend.

Consultation and visitor research clearly identified the 'Bay' and its components, coast, beaches and harbours as the English Riviera's USPs. This should be the focus and central theme on which to base new product development for the future.

Key Opportunities for Growth

Extensive consultation and research sought to identify, key opportunities (themes) for attracting new visitors and growing the visitor economy. The following top five opportunities have been identified:

- maritime leisure
- Agatha Christie legacy
- Global Geo Park Status
- events, festivals and exhibitions
- business tourism

Maritime Leisure

Tor Bay has the potential to be a worldwide 'icon' in terms of water-based activities and become a maritime centre of excellence. It is a deeply indented, sizeable bay, sheltered from the prevailing winds, featuring excellent harbours, outstanding scenery, gentle tides, uncrowded waters and a fantastic natural amphitheatre for spectators to enjoy water based events. These benefits are appreciated and used by local boating enthusiasts, but are currently insufficiently integrated into the broader visitor experience and economy. The current level of maritime leisure provision is considered immature.

The last decade has seen a revolution in water sports and use of 'the beach'. What was once an area dedicated to sun bathing and swimming for just a few weeks of the year has in many

regions been transformed into a year-round 'playground' for adults and children, used increasingly as a base for a widening range of water and sports.

This is coupled with a meteoric rise in the sales of wetsuits which are no longer minority possessions but part of the 'holiday wardrobe' for the majority of visitors.

The maritime leisure industry is currently made up of a diverse range of micro businesses and voluntary organisations across the Bay including, marinas, yacht clubs, sailing schools, kayak providers, wind and surf centre, rowing clubs, and leisure watersports providers (power boats, wind/kite and paddle surfing, kayaking) Consultation included meeting with many and a maritime leisure SWOT has been produced as part of the evidence base.

The following have been identified as priorities to enable growth:

- establish maritime leisure product development action group
- develop Torbay Week as the English Riviera's flagship maritime event
- develop compelling water based 'experiences' and packages
- integrate promotion of maritime leisure activities into central destination marketing
- improve water front food, drink and retail offering
- introduce planning policies that proactively support operators to grow
- provision of more visitor boat moorings
- improve the necessary water activity infrastructure and complementary parking

Agatha Christie



Agatha Christie brings unique strength to the English Riviera brand and presents exciting product development potential, with the Agatha Christie theme indicative of a wider sense of glamour and style.

The opening of Greenway House by the National Trust in March 2009 has further strengthened worldwide appeal and the private sector is reporting a renewed upturn in UK and overseas visitors, including cruise ships, because of the synonymous link with Agatha Christie.

Her popularity will be further enhanced with ITV's plan to premier eight Agatha Christie films through 2009, including a new version of Murder on the Orient Express. Fans will have plenty of inspiration to follow in the real-life footsteps of the author. In addition new Agatha Christie publications are being released on an ongoing basis which is continually raising awareness.

Developed and promoted effectively the Agatha Christie theme has the potential to have the same appeal that Shakespeare created for Stratford, Wordsworth and Beatrix Potter for the

Lake District and Du Maurier for South Cornwall. Agatha Christie is part of the Japanese syllabus so specialist Japanese tour operators should be targeted.

The following have been identified as priorities to enable growth:

- establish Agatha Christie tourism action group
- continued close relations with Agatha Christie Limited in order to maximise opportunities for further product development
- develop Agatha Christie Festival into major event
- integrate the compelling Agatha Christie Story in marketing activities
- maximise all PR opportunities particularly relating to any TV series
- produce multi-lingual promotional materials (particularly in Japanese)
- improve visitor interpretation in resort

English Riviera Global Geopark



In September 2007 Torbay became the 32nd member of the Global Geopark Network and the first urban Geopark in Britain. Studies into the Geopark timeline reveal compelling content with tropical seas, reefs, deserts, drowned forests, mammoths and saber toothed tigers all compelling hooks to attract new visitors. With 32 fascinating sites there is great potential for creative sustainable product development and the Geopark is considered to be a sleeping giant. The Global Geopark is currently managed by the English Riviera Global Geopark Organisation

Positioned and promoted creatively Global Geopark status offers enormous potential to attract visitors from all over the world with the English Riviera Geopark one of Devon's newest 'green' visitor attractions, but care must be taken in consumer positioning.

This was highlighted in the non visitor research when coastal images of the Geopark were considered very appealing, but participants did not understand why they should visit it.

The following have been identified as priorities to enable growth:

- development of compelling short break packages combining the core growth themes (maritime leisure, business, events and Agatha Christie)
- bidding to host for 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



(Spanish Barn – Torre Abbey June 2009)



Across the world major festivals, events and exhibitions are being developed as effective promotional tools to change destination perceptions and attract new visitors as cultural appeal grows. Events, festivals and exhibitions present hooks to make people want to visit a certain place all year round and can generate significant visitor income particularly if combined with accommodation.

The English Riviera is very well placed to maximise on this growing trend having hosted a broad programme of events, festivals and exhibitions for many years including the following major events:

- Torbay Week
- BMAD Bikers Championships
- Riviera Live
- Agatha Christie Festival

The economic impact of events is demonstrated with Torbay Week 2008 generating an estimated £250,000 in accommodation income alone, the 2009 Paignton Bank Holiday Weekend BMAD Bikers Championships resulting in a very busy weekend for accommodation providers and the opening weekend of the first Field of the British Isles exhibition in June 2009 generating over 1500 visitors over the first weekend.

High profile events can generate significant PR coverage and needs to be built on.

The following have been identified as priorities to enable growth:

- establish events, festivals and exhibitions product development action group
- clarify roles and responsibilities regarding event development, management and promotion
- focus on fewer, high profile events, festivals or exhibitions per year
- improve communications regarding event, festival and exhibition information
- integrate promotion of events, festivals and exhibitions into central destination marketing
- facilitate development of events, festivals and exhibition short break packages

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 destination with seaside holiday seasonality alone now being highlighted as unsustainable long term. (Source: Price Waterhouse May 2009)

The English Riviera has the potential to develop and promote itself as a desirable business destination for a wide range of international and national business events and reintroduce the appeal of the seaside conference destination. A Business Tourism SWOT analysis is included in the evidence base to support this.

The English Riviera conference offering is currently dominated by the activities of Conference Torquay, an arms length organisation responsible for the operation of the Riviera International Conference Centre (RICC) together with four and three star hotels that can offer conference facilities and promote their services directly. Conference Torquay was responsible for generating over £9m of conference income and 60,000 overnights in 2008 which highlights the destination's potential to generate business tourism

The RICC currently offers comprehensive facilities for up to 1500 delegates and is the largest conference venue in Devon. This core product is complemented with a number of unusual meeting venues such as Kent's Cavern, Torre Abbey and Paignton Zoo.

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 business
- protect facility of a minimum 1000 arena, plus break out facilities and catering

PRODUCT GAPS

Accommodation

The accommodation portfolio of the English Riviera will be of crucial importance in its rejuvenation and repositioning. An increasing number of visitors are making holiday decisions based on their preferred choice of accommodation, rather than the destination alone. The English Riviera bed stock is currently dominated by small, serviced guest houses. There is too much middle ground accommodation of a similar type, with very few really individual properties that stand out from the crowd or potentially appeal to younger modern markets.

Accommodation gaps have been identified as follows:

- well known modern brands
- spa hotels
- boutique and themed hotels
- quintessentially English (which is a very attractive proposition to overseas markets)
- inns and restaurants with rooms
- 5 star self catering including boat hire

quality touring pitches, particularly hard standing

Attractions

Attraction product gaps have been identified as follows:

- shopping
- national iconic attraction
- family farm attraction
- all weather attractions: undercover water park/ice rink
- visitor passport to package up with accommodation
- theatre and/or concert hall with sufficiently large stage to take big musicals/concerts

Shopping

Shopping is the number one leisure pursuit in the UK and a hugely important all weather tourist attraction. Particular reference is made to the need for improved shopping facilities including markets and in particular increased pedestrianised areas.

Other tourism destinations have seen benefits to their retail and tourism offers from the introduction of pedestrianisation, This strategy recommends/supports a review to determine which shopping areas might be pedestrianised in order to meet the key objectives.

Events, Festivals and Exhibitions

Events and festivals product gaps have been identified as:

- high profile major summer festival
- high profile food festival

Food and Drink

Food and drink product gaps have been identified as:

- general lack of quality places to eat and drink
- specific lack of local fish and seafood/seafood bars, and seafood restaurants
- beachside cafes and bars open into the evening serving local produce
- quintessentially English eating houses such as tea rooms and ice cream parlours
- Michelin star restaurants
- celebrity chef owned or operated restaurants
- buy local food and drink campaigns

Visitor Transport

Transport product gaps have been identified as:

- lack of alternative sustainable transport choices based around the water and cycling

Local Community

lack of local tourist weekends

lack of community discount card in place to tourist products

5. QUALITY

Background

Raising quality is one of the key cornerstones for local, regional and national tourism strategy. Visitor expectations and aspirations will continue to increase as more and more people travel around the world, experience different places and continue to improve the quality of their private homes. Wi-Fi, plasma screen televisions, ensuite bathrooms with power showers and king size beds are becoming the norm for a large majority of today's travellers.

It is vital that any holiday experience offered in the English Riviera meets expectations. Delivering disappointing quality has a larger negative impact than ever before with the introduction of online customer feedback sites and social networks which are very influential.

Delivering quality that at least meets modern day expectations and aims to exceed them is the responsibility of all stakeholders, who must appreciate that tourism success will depend on how attractive the offer is to potential visitors as was highlighted in the non visitor research.

Across the country many seaside resort towns have a new confidence that is being centered on the increased adoption and promotion of nationally and internationally recognised standards including:

- National Quality Assessment Scheme (NQAS) for accommodation providers
- Visitor Attraction Quality Assessment Scheme (VAQAS) for attraction providers
- Rosette accredited restaurants for fine dining
- Blue Flag and Beach Awards for quality beaches
- Green Tourism Business Scheme (GTBS) and related programmes supporting sustainability
- Enjoy England Awards for Excellence (EEAE)

All of these badges of approval serve to give consumers greater confidence to buy in to a destination and provide a competitive edge in what is a very competitive market place.

The English Riviera must be committed to continuing the promotion of engagement with and adoption of official nationally recognised standards and their relevance. This will support the regeneration of the English Riviera as a leading visitor destination and enhance the English Riviera brand values.

Current Situation

The current quality of the English Riviera experience is inconsistent and the destination currently has a mixed reputation regarding quality. Raising the standard of the overall offer will be a challenge and opportunity in creating a more attractive destination that can compete with the competition.

Consultation findings highlighted evidence of a direct correlation between highest quality and higher occupancies and repeat bookings, with 4 and 5 star products clearly out performing lower graded accommodation. Added value as part of the delivery of quality will grow in

importance with the need to surprise and delight guests and to make visitors feel special with thoughtful extras that go beyond what was expected. Added value also increases rates of repeat business.

Accommodation Standards

Since 2001 the English Riviera has only promoted nationally accredited accommodation (NQAS) that meet minimum national standards, in line with NQAS policy. This consumer facing scheme, overseen by Visit England, recognises quality and differentiates levels of facilities and services by the display of 1-5 stars. Individual businesses are assessed by a paid annual inspection scheme. Evaluation of current quality standards presents a mixed picture in respect of accommodation standards across the English Riviera, highlighting both positive and negative trends as shown in the table below:

English Riviera breakdown of NQAS accommodation	Number of properties		
	Apr-09	Apr-08	Apr-07
Hotel	60	60	59
Guest Accommodation	189	196	212
Self-Catering	337	294	288
Park	11	12	12
Holiday Village	1	1	1
Hostel	0	0	0
Campus	0	0	0
Total	598	563	572

Source 3

The following table summarises the number of Gold and Silver Award accommodation businesses across the English Riviera compared to the rest of Devon.

	English Riviera	Devon
Hotels		
Gold	0	6
Silver	0	10
Guest Accommodation		
Gold	3	24
Silver	14	77
Self-Catering		
Gold	26	70

Source 3

Although progress has been made there remains significant opportunity for more businesses to achieve these special awards which will help in the overall repositioning of the English Riviera.

Anecdotal evidence through the consultation process highlighted that those businesses that have gone the 'extra mile' and been awarded these special categories appear to be performing better than those businesses that have not

Additional Accreditations

In addition to encouraging businesses to invest in obtaining gold and silver awards investment in attracting specific markets through the following schemes is recommended.



Similarly Enjoy England Awards for Excellence enhance the appeal of accommodation and attractions.



In recent years England for Excellence awards have been awarded to the following English Riviera tourism businesses:

- Kent's Cavern
- Paignton Zoo
- Blue Chip Vacations
- Compton Pool Farm
- Atlantis Holiday Apartments
- Beverly Holiday Park

Attraction Quality Standards

Complementing NQAS, the Visitor Assessment Quality Scheme (VQAS) is operated by Visit England. Three members of the English Riviera Attractions Partnership (ERAP) are understood to have invested in VQAS:

- Paignton Zoo
- Living Coasts
- Paignton Pier

Restaurant Quality Standards

Rosette accredited restaurants for fine dining

The English Riviera is currently under presented in this category with only 3 establishments awarded the AA rosette for food, out of a total of 44 in Devon and two Michelin star restaurants, the Elephant and Orange Tree in Torquay.

Beach and Coast Quality Standards



Britain's beaches have improved markedly in the last 20 years and are now considered more attractive than some years ago, largely as a result of the clean beaches campaigns successfully boosting the image of UK beaches. The continuing appeal of clean beaches and the sea remains one of the main reasons to visit the South West. Blue Flag is the national award for beach cleanliness and has become an increasingly important quality indication for consumers.

The English Riviera is performing extremely well in this area and was placed joint first in the national league of Blue Flag Awards. This is a major achievement and vitally important in the repositioning of the resort based round its natural asset, the Bay. The BBC Coast programme named the English Riviera as having the best sandcastle building sand. These factors mean the English Riviera is in a very strong position to confidently promote its beaches, which positively enhance the brand.

Blue Flag beach award beaches include:

- Oddicombe Beach
- Meadfoot Beach
- Preston Beach
- Broadsands Beach
- Breakwater Beach

Quality Coast award beaches include:

- Maidencombe Beach
- Oddicombe Beach
- Anstey's Cove
- Meadfoot Beach
- Torre Abbey Sands
- Preston Beach
- Paignton Beach
- Goodrington South Sands
- Broadsands Beach

Sustainability and Green Tourism



The adoption of sustainability as a way of life is growing. This complements quality and growing consumer commitment to reduce carbon footprint, with increasing concern regarding climate change. Sustainability can no longer be considered as optional, but crucial and must be embedded across all tourism operations.

Embracing Visit Devon's sustainable tourism campaign is recommended. The green tourism business scheme (GTBS) is currently the leading sustainable tourism certification scheme in the UK with businesses assessed by a qualified grading advisor against a set of criteria, covering a range of areas such as energy, water, waste management and biodiversity. Accreditation rewards tourism operators with a gold, silver or bronze award.

28 businesses across the English Riviera have been awarded GTBS accreditation with an additional 15 businesses awarded the complementary David Bellamy Award conservation award.

The English Riviera hosted the South West Regional Development Agency (SERDA) 'Keen to be Green' tourism industry conference in 2008. Recognition through enhanced promotion is recommended to help with re positioning.

Accessibility

The Disability Discrimination Act (DDA) (1995 amended 2005) places duties on providers of goods, services and facilities not to discriminate against people with disabilities. Like everyone else, tourism providers must take 'reasonable' steps to change practices, policies and procedures to make their facilities and services accessible to disabled people.

By 2025, more than one third of the UK's population will be over 55. We are all living longer, so it is important to recognise that the baby boomers may need a little extra help whilst on holiday. In response to this, Visit England has refreshed the entry-level mobility standard of the National Accessible Scheme and introduced 'One Step Ahead' as an additional accreditation. It is important that English Riviera tourism providers embrace this trend.

Key Actions to Enable Growth

- reward and celebrate success, introduce 'Best in the Bay campaign'
- embrace nationally recognised accreditation schemes
- introduce online visitor feedback mechanism
- increase PR to celebrate everything positive relating to quality achievements
- present accommodation in a league with the highest accredited at the top
- appoint best practice industry sector champions to support fellow businesses
- encourage all tourism businesses to take part in quality training programmes

Employment, Training and Business Support

*“We believe that our greatest resource is our people and we must develop our skills base, creating a ‘can do’ entrepreneurial culture. We must also become a place that is truly open for business, encouraging investment and new ideas, whilst being committed to upgrading our traditional industries, especially tourism”.*³

The Torbay Economy

Not surprisingly the distribution of business sectors in Torbay is biased towards the tourism sector (as defined by AB1 and Nomis) comprising distribution, hotels and restaurants. .

Top 10 Sectors by Employment			
Sector	2000	2007	2012
Health & Social Care	9,810	10,880	11,460
Retail	7,960	8,160	8,290
Tourism & Leisure	5,610	6,480	7,090
Business Services	3,720	6,210	6,830
Construction	3,530	4,440	4,930
Education	3,480	4,260	4,080
Wholesaling	3,060	2,830	2,950
Other Financial & Bus. Services	1,390	2,120	2,470
Public Admin. & Defence	1,970	1,900	1,800
Electrical & Optical Equipment	3,470	1,360	1,690

Source: ABI, NOMIS

As a result the workforce is significantly dependent upon tourism for employment opportunities.

The providing employment is tourism’s main economic benefit and this strategy seeks to enhance this benefit through the development of a robust all year round industry that can provide more full time jobs and better paid seasonal jobs for the local community. This is particularly important as one of the weaknesses in the Torbay economy is that there are too many part time seasonal jobs.

Training

There is a need for residents and workers in the English Riviera to improve their skills so that the individuals can improve their chances of well paid employment. Improving skills will help businesses become more competitive and increase the quality of their product offer.

This is particularly true of the tourism industry whose success is dependent on delivering the high levels of service that modern day customers expect. Increasing the availability and access of training in customer service skills for everyone in the visitor contact chain is seen as crucial in order to maximise the number of visitors wanting to return to and recommend the English Riviera.

³ Nick Bye, Chair of the Torbay Strategic Partnership (Torbay Community Plan 2007+)

Within Torbay the Torbay Development Agency has established a group to improve the provision of training and skills and this strategy recommends that the industry supports that group and supports its efforts to ensure that training is meaningful for business.

Business Support

The English Riviera is on a very competitive world stage and in today's market place professionalism and customer service determines the winners and losers. Everyone involved in providing a direct or indirect tourism service, including accommodation, attractions, shops, transport, food and drink, entertainment, activities and all visitor services must appreciate the growing need to deliver the highest levels of customer service at all times and the need for ongoing training and personal development.

One of the key roles of the new English Riviera Tourism Development Company will be to communicate the availability of training programmes to all stakeholders including:

- national and regional accredited customer service training programmes
- local training programmes provided through South Devon College
- business development support available through Business Link and through the Torbay Innovation Centres⁴ to assist with the development of compelling tourist products and services

Consultation identified the need for enhanced customer service training particularly in the town centres. Partnership working between the English Riviera Tourism Company and the Torbay Town Centre Company is proposed to address this.

⁴ www.torbayinnovationcentres.co.uk

6. VISITOR SERVICES



Background

Visitor Services in the Tourism Sector have traditionally focused on the provision of visitor information. The Development of Tourism Act (1968) recognised the need for a national network of TICs, supported by printed literature as the source for all information provision.

Today, however, the internet is the prime source of pre arrival information supported by a multitude of radio and television channels and mobile communication channels. Not only are there more channels for information distribution, but there are more people in the information distribution field.

Over the past five years, there has been significant discussion at national, regional and local level about the visitor services functions managed in the main by England's local authorities, largely in light of the internet revolution and local authority budgets.

This saw VisitBritain launching its Customer Contact Strategy (October 2004) and the Local Government Association (LGA) producing its Consultation on Tourist Information Centres (October 2005). Prompted by these and the visitor research undertaken for Towards 2015, additional work was undertaken in the South West leading to the TI Best Practice Guidelines (Sept 2006) and the new 'Official Partner' guidelines and standards (2007)

These new standards are widespread across most of England and the South West, the main exception being Devon where they have only rarely been adopted. English Riviera centres are the exception to this, having met the new standard and implemented the new procedures.

It is now timely for the English Riviera to further reassess its Visitor Services function, in particular its core information and contact services, in order to deliver the key objectives of the strategy.

The Visitor Services team provides a number of essential services for prospective and actual visitors, to ensure that the one million plus visitors to the English Riviera who are attracted here receive the best possible welcome and experience and provided with information to maximise their spend.

Current Situation

Torbay Council remains currently responsible for the provision of visitor information. The Torbay Council Visitor Services Team currently focuses on the following:

- operation of three Tourist Information Centres (Torquay, Paignton and Brixham)
- operation of the English Riviera call centre (customer contact centre)
- literature distribution of all ERTB promotional materials

The cost for this service is currently met by Torbay Council and totals £148k net per year.

This service is complemented by a range of additional and increasing number of information service providers both online and offline all with the aim to attract visitors and provide information including:

- three significant alternative web sites to englishriviera.co.uk
- one significant alternative to the official English Riviera Holiday Planner
- plethora of individual leaflets and other publications

Competition is healthy as it provides more information for the visitor and choice of marketing channels for the businesses.

However this multi channel platform presents significant challenges for the ERTB as a result of the policy to align to national quality standards as a mechanism to help ensure quality control of the products offered. In comparison the private sector information providers' tendency is typically towards their individual or organisational interests rather than what is always best for the visitor and the need for quality control.

The visitor survey conducted for Towards 2015 proved that visitor information whilst on holiday is a key element within the visitor experience, and one that was not being well delivered across the region. The current plethora of different but incomplete information sources has done nothing to improve this, hence the need for a further reassessment.

Trends

All council budgets across the UK are under increasing pressure and non-statutory services like tourism are being squeezed hard. It is not a question of whether these services are offered, more a question of how they can be offered in a more cost effective manner, and at the same time reflects the ever changing needs of those who visit work and live on the English Riviera.

The 2007 English Riviera Visitor Survey and 2009 Easter Visitor Survey (conducted specifically to assist the preparation of this revised strategy) identified that less than 25% of the total of the one million visitors are currently visiting any one of the three English Riviera Tourist Information Centres whilst they are on holiday.

This trend mirrors UK trends with a continuing decline in footfall in TICs across the UK. Footfall is decreasing as traditional users are now researching detailed information on the internet before their visit (see Non Visitor Survey results May 2009) and often printing it out to use in the destination.

The English Riviera has also followed the national trend in the decline of enquiries by phone and increase in email enquiries. The role of printed literature material has also changed over recent years with a decline in the need for destination guides but a continued need for 'what to do' and attractions guides. The effectiveness of the traditional holiday guide in the generation of holiday bookings has also declined with 31% of visitors now booking their UK holidays entirely online, with the figure for all holidays, including overseas rising to 48% (Mintel 2007 and 2008)

National, regional and local thinking is changing regarding visitor service provision and many areas are currently reviewing the integration between visitor services, marketing, product development and environmental sustainability within the framework of quality, consistency and cost effectiveness.

Data Management

Data Management is an increasingly important component of the Visitor Services function. Over the past ten years data management has changed dramatically from offline card index systems to complex and fully integrated online national and international electronic databases.

Data input is now playing a major role populating not only the English Riviera web site but through the data collection management system (DCMS). This system links the English Riviera to Visit Devon, Visit South West, Visit England and Visit Britain through one seamless online communication system.

Effective data management provides the tool for effective Customer Relations Management (CRM) which is an increasingly important tool for engagement with existing customers and influencing their decision to recommend and return, prospecting non visitors and influencing their decision to visit the English Riviera for the first time.

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 in partnership with stakeholders
- consolidate traditional TIC counter provision to one key hub in Torquay
- expand the call centre facility to become a central 'box office'
- continue investment in online visitor data to facilitate increased custom

Additional Visitor Services

In addition to the provision of visitor information as described above the current Visitor Services portfolio provision across the English Riviera includes the following:

- visitor parking, signage, toilets
- transport (including inter resort, taxis, buses, water transport)
- gardens, parks, beach management
- refuse collection and increased recycling provision for visitors
- events, festivals and public theatres management

Consultation feedback highlighted the need for continued investment in signage, particularly at the gateways. Moving forward free Wi Fi will be seen as a standard visitor service.

7. MARKETING

Background

Tourism destinations operate in an increasingly competitive market place. To compete effectively the English Riviera needs greater investment by the public and private sector in the implementation of powerful marketing and PR campaigns.

The strategic role for marketing is to provide a clear focus on brand development and increasing destination brand awareness. With an ever increasing choice of communication channels for enquiry and booking and with a variety of commission models, the private sector must invest in a mix of marketing channels that are right for their individual business.

The internet is now the primary research tool to research for any holiday, break or leisure activity (Mintel January 08). The English Riviera non visitor research confirmed this as none of the participants had used a brochure to research their short break or holiday and all had used the internet to carry out research.

Review of Current Marketing Activity

The marketing of the English Riviera has followed the traditional format for public sector led destination marketing which has centred on the production of a guide and its distribution via TICS, with tactical leaflets produced and advertising undertaken to support this. The maintenance and development of the English Riviera web site is the other key activity.

Current marketing activity is managed by the English Riviera Tourist Board team who undertake the following:

- oversee the management of englishriviera.co.uk
- production of annual official English Riviera Holiday Planner (guide)
- management of the Tourist Information Services
- coordination of national advertising
- production of a range of supporting offline literature
- support the management and promotion of festivals and events
- oversees the PR activities for the brand
- coordination of sustainable tourism developments

A review of marketing activity from 2007 to 2009 is included in the Evidence Base.

Target Markets

The English Riviera has broad appeal and marketing activity should be developed to capture a wide range of markets.

Geographical Markets

The key geographical areas for the English Riviera to target are:

- residents of Devon, Cornwall, Somerset, Dorset – local tourists
- Bristol
- South Wales
- Midlands
- M4 corridor
- London and the South East

Tracking the origin of visitors to the South West shows an interesting trend with visitors from within the South West being a key market highlighting the relevance to market closer to home with the growth in shorter breaks.

Impact of Demographics

Current visitor numbers to the English Riviera are dominated by C1, C2 and D families, the over 60s and coach groups.

In planning future marketing campaigns it is vital that the core family market is protected and the increasing appeal to take holidays in the South West for school holidays outside the main summer break maximised.

The South West has and will always be synonymous with family holidays and the English Riviera is well placed to lead the development of this market. However the family market, other than families with under 5s, is highly seasonal and there is a continuing need for the English Riviera to broaden its visitor profile. In order to ensure the English Riviera is a year round destination there is a need to target different markets according to the time of the year.

Whilst protecting the core market of traditional families there is a need to appeal to new markets, which must include Generation X (born between 1964 and 1979) and Generation Y (born between 1980 – 1990s). These groups are less likely to follow traditional methods of booking holidays and are less likely to consider English seaside resorts.

This is because they do not have the motivation of nostalgia and cherished memories that Baby Boomers (born from 1946 – 1964) have, who would have taken seaside holidays as children in the 1950s and 1960s, before the advent of cheap air travel and globalisation of holiday destinations.

Generation X and Y both have an extremely high use of technology. Generation Y are on line natives who have integrated technology into their everyday lives and for whom technology is central to their entertainment and socialising. Generation X use technology to support their busy lives, often juggling families and careers and embrace the convenience the digital age has brought.

Both Generation X and Y are unlikely to send for a brochure when they can access the information through the internet far more quickly and easily. Generation X and Y are the English Riviera's potential future markets, offering opportunity for growth, but the appropriate online and digital channels of communication will need to be increasingly invested in to reach them and maximise growth opportunities through their growing desire to take weekend breaks.

Primary Target Markets

The key markets for the English Riviera are:

- families
- over 50s
- couples (DINKS - dual income, no kids)
- conference and business

There is also a need to target groups by their interests as well as their age or lifestyle group.

Families

Families with pre-school or school aged children is the English Riviera's core market, which dominates bookings for all school holiday periods. Specific focus should be placed on attracting families with children aged under 5 as they can travel out of the main season.

The Over 50s

There are 20 million people in the UK aged over 50, 42% of the population and by 2020 they will account for half the population. They control 80% of the country's wealth and 40% of consumer spending, over £205billion a year. They are the only growing sector of the population with high disposable income and more leisure time than other sectors of the population. Active retired people make up a significant proportion of the short break leisure market.

Couples (DINKS)

All age couples, DINKS (dual income with no kids) should be actively targeted as this market has fewer commitments and is often able to travel at short notice in response to special offers. This group of people makes up a high proportion of the high value

weekend market. There is potential to broaden the appeal of the short break product offering through the coordinated development of the area's natural assets and expanding experience and themed based products embracing lifestyle, events and festivals.

Conference and Business Visitors

There is great potential to market the English Riviera as the place by the seaside for conferences. This will have special appeal for associations as long as the conference facilities are protected for 1000+ delegates, with plus break-out and catering facilities.

Secondary Markets

Specialist Groups

Specialist groups, many of whom are from overseas need to be targeted to include walking, history, heritage, geology, education and literary groups. The Geopark and Agatha Christie provide potentially compelling reasons to want to visit the English Riviera.

Day Visitors

Defined as including the local population (people living in Devon) and regional population (people living in Cornwall, Dorset and Somerset). Local communication on what is happening to appeal to residents and visitors is essential in the development of this market.

VFR Market

The VFR market is friends and families visiting and staying with residents of the English Riviera and is worth in excess of £12m (SWT Value of Tourism Statistics 2007)

Overseas Markets

The English Riviera has always attracted a higher than regional average of overseas visitors with the Agatha Christie legacy strengthening its appeal. Overseas staying visitors are reducing at a notably slower rate than domestic staying visitors and generate over £15 million of tourist income in 2007 as the following tables highlight.

Overseas Visitors staying in serviced accommodation

Year	Trips	Nights	Spend	Average PP Value
2007	70,000	202,600	£15,584,000	£222.62
2006	55,700	186,800	£13,274,000	£238.31
2005	64,800	289,400	£19,964,00	£308.08

Source 1

The regional average regarding overseas visitors is 5% of the total compared to 11% in 2007 for the English Riviera. With the growing worldwide appeal of Agatha Christie, the Global English Riviera Global Geopark the English Riviera should actively target certain overseas markets including in particular the US and Japanese markets because of the growing appeal of the Agatha Christie legacy.

Targeting overseas markets in collaboration with the English Riviera international language schools should be further explored. The production of collaborative multi lingual promotional materials should be considered which would bring mutual benefit in attracting both first time and repeat visits by both students and their families.

Marketing Recommendations

The English Riviera's marketing needs to reach the proposed target markets and effectively address seasonality. A pro active, highly co-ordinated effort is required which should embrace the following:

- introduction of seasonal campaigns
- increased online focus
- increased partnership marketing
- increased communication with existing and potential customers
- development of one platform to promote all components of the brand
- continuous monitoring and evaluation of all marketing activity
- continuous investment in market research
- production of multi lingual promotional materials

Marketing Campaigns

Alignment to national and regional themes is recommended in order to secure maximum exposure supported by specific campaigns designed to promote the English Riviera. Consultation and research has highlighted the following campaigns presenting opportunities for further development.

- top 10 reasons to visit the English Riviera (multi lingual)
- romance on the Riviera (shoulder season short breaks)
- by the sea - family fun
- festivals and fairs/events
- business in the Bay (business market)

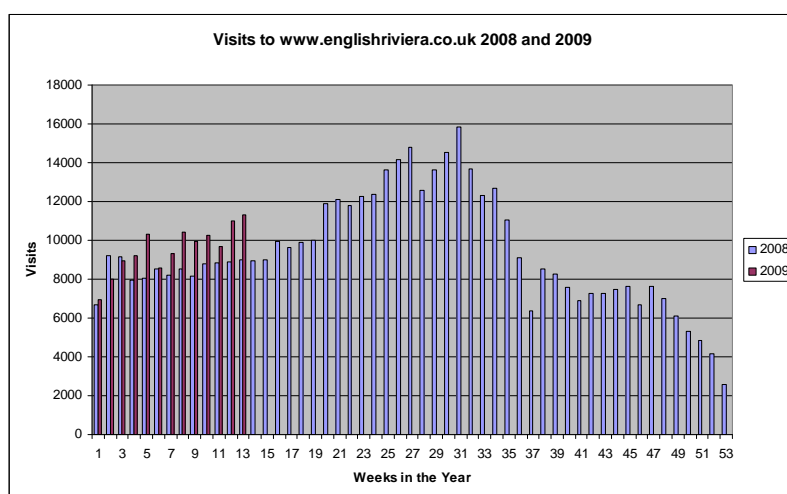
Routes to Market

The English Riviera will need to develop cost effective and valued online and offline routes to market that generate quality leads and bookings. Any activity must create a competitive edge and appeal to the new generations of traveller, many of whom would not include the English Riviera in their thinking for a possible holiday destination. In order to reach

Generation X and Generation Y the English Riviera needs to embrace social marketing as part of the approach to motivating more people to consider and then book their holiday or short break in the area. They are not destination driven but more likely to be motivated by what their friends and family are doing or by the desire to have a particular experience.

On Line Marketing

The new www.englishriviera.co.uk web site was launched in 2007 enabling a fully integrated destination, Visit Devon, Visit South West and Visit England online platform. Management of the site is currently managed in house. As would be expected year on year traffic levels are growing.



The new site was put in place to promote online accommodation bookings in order to bring the site up to date incorporating the most up to date technology. The site is now updated by a DMS (Data Management System) and a CMS (Content Management System). Engagement in the Eviio online booking facility has not been as high as expected.

Web site developments since the launch include:

- virtual guide - the English Riviera Holiday Planner is now available to view online
- online shop - launched with English Riviera and Agatha Christie merchandise
- vidcasts - promoting walks, Torre Abbey and English Riviera Global Geopark
- podcasts - stories and walks of the area

The following key actions are recommended to enable growth:

- investment in professional optimisation of the site to ensure high Google rankings
- investment in top quality online brand image library to include video clips
- investment in online PR to complement offline PR activity

investment in additional micro sites to promote the specialist campaigns
introduction of online social networking communication tools
investment in detailed web site performance monitoring

Off Line Marketing

Consumer booking processes are clearly indicating a dramatic decline in the traditional importance of offline guides. Some leading destinations such as Brighton have made the decision to withdraw their traditional guides and focus activity on the production of a portfolio of easily downloadable online mini guides, offering tailored information.

In the light of these trends and the results of the Easter Visitor 'snap shot' research which verified this trend the continued production of one major offline official English Riviera Guide should be questioned.

Offline materials still have their part to play, particularly for the older generation (70+) who are not as familiar with the internet but the need to get the balance right between offline and online provision of visitor information will prove increasingly crucial with greater investment in the latter recommended.

Supporting this changing trend all offline materials should be self funding through private sector investment through advertising income with proposed activity to include:

production of a reduced pagination official annual English Riviera guide
free English Riviera and South Devon visitors map

Every effort should be made to consolidate resources for the production of literature to avoid duplication and to simplify the different propositions for the visitor. Consideration should be given to working with other partnerships, such as Visit South Devon in the production of mutually beneficial visitor literature.

PR and brand awareness is a key part of off line activity and consideration should be given to these activities being funded separately from the rest of the campaign with a dedicated budget.

Tourist Information Centres

A review of the effectiveness of the TIC distribution network needs to be undertaken to assess its future as a route to market, as only 25% of current visitors use this service to plan and book their holidays. A review is needed to further improve the cost effectiveness of enhancing the visitor experience through better local information, including collaboration with private partners.

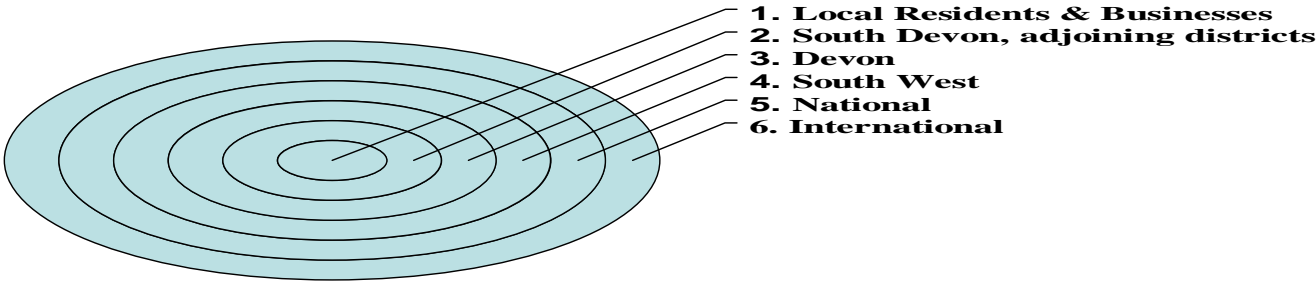
Partnership Marketing

There is great scope to develop partnership marketing with dedicated brochures produced in conjunction with key members of the private sector and other regional partners and mutually beneficial opportunities should be explored to increase marketing communication channels.

Public Relations

There is a need for an effective PR and communications campaign to tell impactful stories to motivate people to consider and then book the English Riviera for their holiday or short break. The approach to PR needs to be creative and dynamic and start with the local residents and businesses. Just as the residents need to live the English Riviera brand, they need to be fully involved with and committed to the messages that attract visitors to the place they live and work in.

The diagram below illustrates this and shows the wider markets projecting out from the core of local residents and businesses.



Consideration should be given to moving a significant proportion of the above the line budget currently dedicated to very traditional media advertising to much enhanced PR activity.

All PR activity must project a positive profile for the English Riviera and align with its brand values.

The PR campaign should include the following:

- the development of a clearly defined strategy that complements marketing activity
- calendar of releases to maximise coverage of events, festivals and exhibitions
- carefully planned programme of individual and group media visits
- increase PR presence in local and regional media
- promote area as an attractive alternative

take advantage of any links with TV programmes

Marketing Budget

The marketing budget for the current and last year is shown below:

Marketing Budget		
£k	2009 - 10	2008 - 09
Tourism Team	294.6	279.8
Tourism Marketing	151.5	156.6
Local Resort Marketing	26.3	26.0
New Market Development	6.9	6.7
	479.3	469.1
Call Centre	32.0	17.1
TICs	170.3	190.0
	681.6	676.2

In planning marketing activity to achieve the strategy there will need to be an increased spend on promotional activity in order to build the brand with a brand response advertising campaign and to increase the English Riviera's share of voice in the market place. Consideration will need to be given to the breakdown of spend and what will be the most effective mix of activity and staff support in the future.

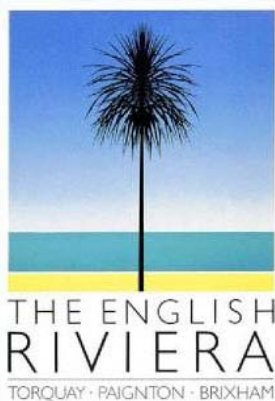
The recommended promotional budget for the English Riviera to allow for revitalised brand response advertising, on and off line activity and high profile PR is £250k per year.

Marketing Monitoring and Evaluation

Continuous monitoring and evaluation of all marketing spend is vital to ensure an acceptable return on investment (ROI) is being achieved. Currently the effectiveness of all marketing activity is monitored using the Torbay Council Spar.net system.

It is essential that all future marketing spend is allocated with clear KPIs and target responses. It will be important that the English Riviera KPIs align with those of Visit Devon so they can be benchmarked against how other areas in the South West are performing. In addition to market monitoring and evaluation of promotional activity a budget should be allocated for market research which could include gathering customer feedback and/or exploring future marketing opportunities.

8. ENGLISH RIVIERA BRAND



(Existing image)

Background

The resorts of Torquay, Paignton and Brixham have been collectively marketed as the English Riviera since the 1970s when the brand was launched for the area. The brand has used a strong graphic image of a palm tree on the coast.

The consultation with the industry and the market research undertaken supported the continued use of the English Riviera brand name, but it was felt it needed to be refreshed and relaunched to increase its awareness, understanding and impact.

The main association with the brand name within the private sector is of coast, beach and the Bay itself. Around half the respondents to the consultation questionnaire felt the brand needed to be refreshed which may include the palm tree in the logo. Only a small minority felt there was a need to develop a new brand identity.

The visitor research conducted over the Easter holidays showed that, although most visitors used the name of the actual resort they were staying in to describe their holiday destination, they had a high prompted awareness of the area being known as the English Riviera and a positive perception of the brand name.

Similarly the non visitor research showed a good level of awareness for the brand name, with top of mind including palm trees, slightly warmer, nice hotels, promenades, clean beaches, gardens and places to walk. The brand name was well liked, but there was a lack of understanding of exactly which area the English Riviera covered

Generally Torquay was seen as the leading destination for the area but there was mixed views of what the resort represented. Paignton was perceived as a down market family resort and Brixham as a quaint fishing village.

Any brand development will be complementary to the work, to be led by EDC, on the area as a whole for inward investment and as a business location.

Key Role of the Brand.

Currently the English Riviera name is well known but there are mixed perceptions as to what it exactly represents or located. It is strongly recommended that the brand name is retained but its values revitalised to clearly represent the product offering outlined in this strategy and the visionary aspirations.

Managing expectations during any transitional period is important as the word 'Riviera' can be perceived as more attractive than the current product offering.

Although the brand as a whole is currently tired there is a great deal of strength in the brand name which must be retained and built on in order to rejuvenate it into a single identity that all stakeholders can believe in and fully utilise.

A brand identity and set of brand values needs to be developed for the English Riviera which will be integral to all promotional activity. The brand will sum up and capture the unique spirit of the area and its people and become the framework for all communications and the outward facing personality of the area. At a time when consumers are increasingly brand literate it will help shape perceptions and highlight the unique qualities on offer. The visual identity of the brand must be high quality and reflect the diversity and attractiveness of the region.

To be effective the English Riviera brand will need to have high impact, as well as clarity and consistency, with guidelines that are simple to understand and use. All on and off line marketing activity will use strong imagery in an emotionally engaging style. The brand will need to be iconic and express the values that lie at the heart of the English Riviera's character and aspirations. It will be the platform to promote all that's best about this unique area and create a real 'must visit' destination area.

Need for a Strong Brand

A strong brand must be developed in order to support the key objectives of this strategy. In order to compete effectively the English Riviera needs to be known for something that sets it apart from the competition. Brand shapes perceptions and the brand positioning will highlight the unique qualities and all stakeholders can align with it and focus all marketing strategies across the English Riviera.

The brand must sum up the collective essence of the resorts of Torquay, Paignton, Brixham, Babbacombe and Cockington. The brand imagery and logo should also be developed to enable the individual personality of each of the areas to be expressed in relation to the English Riviera as a whole.

The brand development must be fresh and exciting, whilst reflecting the heritage and Englishness of the area. It must build emotional connections that make people want to visit or relocate their home or business in the area. The brand must engage hearts and minds to tell a clear, coherent story about the area's unique appeal and strength. With the individual tourist areas (Torquay, Paignton, Brixham, Babbacombe and Cockington) all offering such appealing differentiation, there is considered a good opportunity to develop sub brands. In addition sub brands could effectively be developed to embrace the key growth areas that have been identified: maritime leisure, business, events and festivals, Global Geopark status, Agatha Christie and complementary themed campaigns such as 'Romance on the Riviera' and 'Family Fun.'

Need to Audit the Brand.

The response to the consultation questionnaires and the visitor and non visitor research has given a good insight into current brand awareness and perceptions. The research undertaken for this strategy can help with this process but more detailed work may need to be done to produce a full brand audit. This will establish:

- what the spontaneous associations are that spring to mind
- what these perceptions suggest about the English Riviera
- what the mood of the brand is
- what special qualities the area has
- how the area compares to the competition
- how the brand can best complement the Devon brand

Need to Develop a Brand Print

From the brand audit a brand print can be developed. This needs to be a paragraph that sums up what the English Riviera offers which can be distilled to a short sentence or a few words.

A good example of this is the city of Brighton, which positions itself as:

'Free- thinking city'.

From the initial work done on this project a visitor brand print for the English Riviera could be:

'South Devon's beautiful bay'

This description is seen as offering considerable potential moving forward, with the word "south" a very positive word to describe any tourism product with its connotations of being warm and sunny. The reference to South Devon will help to clarify the location of the English Riviera which was identified as a weakness help reinforce its enviable coastal location.

Development of Brand Values

The English Riviera brand needs to be revitalised through the development of brand values. These will underpin and shape the way the brand looks and feels in design and language. Brand values are interpreted through

design, graphics and logo
language and strap line
imagery
tone of voice

Brand Alignment

Once a clear set of brand values has been agreed and developed it is essential that all involved in tourism align to and use the brand logo in their own promotions to help raise brand awareness quickly.

Stakeholder engagement is needed by both the private and public sector. All have a key role to play in promoting the English Riviera brand through the images used, the words written and the things said about the area.

All those involved in tourism need to 'live the brand' and be ambassadors for it.

To clarify the brand positioning further consideration should be given to the adoption of the English Riviera branding as the place brand by Torbay Council and the new Economic Development Company to strengthen regeneration and inward investment.

Interpretation of the Brand

Research findings confirm that the current logo with its visual identity of the English Riviera of the palm tree needs to be reviewed. Any amendment to the brand imagery must be high quality and reflect the unique appeal of the area.

Once any amendments to the current logo and visual identity are agreed guidelines need to be developed for the use of people, iconic images, detailed and abstract images. To ensure consistency there should be commitment to work towards a central generic library of photography and graphic images.

To ensure consistency and clarity of message guidelines need to be developed for the usage of the brand to include

- positioning with partner logos and web address
- colour and mono usage
- use on photography

- minimum and maximum size and exclusion zone
- typeface

A consistent tone of voice needs to be used for all communications which should bring the brand values to life. What is said about the English Riviera is crucial in building the brand and a consistent use of a common tone of voice will build a coherent brand.

A brand champion needs to be appointed to ensure the clarity and consistency of its use and it is proposed that the new English Riviera Tourism Company is the brand guardian.

Brand Equity

Once the revitalised brand is developed, along with increased investment in PR it will build equity which will deliver

- the ability to attract new and retain existing visitors
- sustained success through attracting higher satisfaction and loyalty
- visitors, residents and businesses will think the right things, driven by the brand values when they see the brand imagery
- strong belief in and commitment to the brand imagery of the English Riviera being an inspirational and aspirational visitor destination and the best place to live and work

9. TOURISM MANAGEMENT

Current Situation

Tourism Management is currently overseen by Torbay Council with division of responsibility as follows:

Strategic Tourism - responsibility of the Torbay Development Agency
Visitor Services and Marketing - responsibility of Resident and Visitor Services –
Torbay Council

The strategy brief requested an evaluation of current tourism management and presentation of recommendations for future management partnership options based on a consensus of opinion.

Consultation findings highlighted significant tensions and sensitivities between public and private stakeholders, which are having a negative impact locally, regionally and nationally.

There are currently many organisations directly and indirectly involved with tourism promotion which highlights the current fragmentation and duplication. These are:

Babbacombe Bay Marketing Group
Babbacombe and St Mary Church Traders
Brixham Tourism Partnership
Conference Torquay
English Riviera Attractions Partnership (ERTP)
English Riviera Tourist Board (ERTB)
English Riviera Geopark Organisation (ERGO)
Torbay Accommodation Providers (TAP)
Torbay Coast and Countryside Trust (TCCT)
Torbay Local Food Action Group
Torbay Hospitality Association (THA)
Torbay Self Catering Associating (TSAC)
Sea Torbay

This fragmentation and division is preventing 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.

On the 21 April, 'The Future of Tourism', a major public consultation was held, which attracted nearly 250 delegates from across the private and public sector.

Five options were presented at the event, which were:

- retain the current status quo
- the THA to lead a new private sector led organisation, funded by the public sector
- form an Area Tourism Partnership led by the public sector
- form a collaborative partnership with Visit South Devon
- form a new private sector led destination management and marketing focused private/public sector partnership company aligning to regional direction

From the meeting there was a clear consensus on a desire for unification and a consensus for further exploration of the formation of a new private sector led organisation with the request to explore closer alignment to the marketing activities of Visit South Devon and Visit Devon expressed.

Recommendations for the Future

It is essential that the English Riviera begins to gain a competitive edge and to enable this the establishment of a dynamic, tailor made private sector led Tourism Company is proposed. This would be launched in April 2010 as a fresh vehicle to focus on achieving the key objectives:

- 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

Similar partner organisations have already been formed successfully in many UK destinations highlighting the benefits of facilitating stronger and closer public/private sector working.

The primary benefits of forming the new English Riviera Tourism Company will be to:

- provide a unified new platform to move forward
- facilitate an increased pace to address the key objectives which will lead to an increase in employment and a reduction in the seasonal nature of tourism employment

Priority responsibilities for the new company should be to:

- drive the rejuvenation of the tourism industry in conjunction with the EDC
- maximise visitor spend
- develop a compelling brand
- coordinate and deliver effective modern destination marketing
- maximise funding opportunities for tourism marketing
- provide effective lobbying routes to regional and national platforms

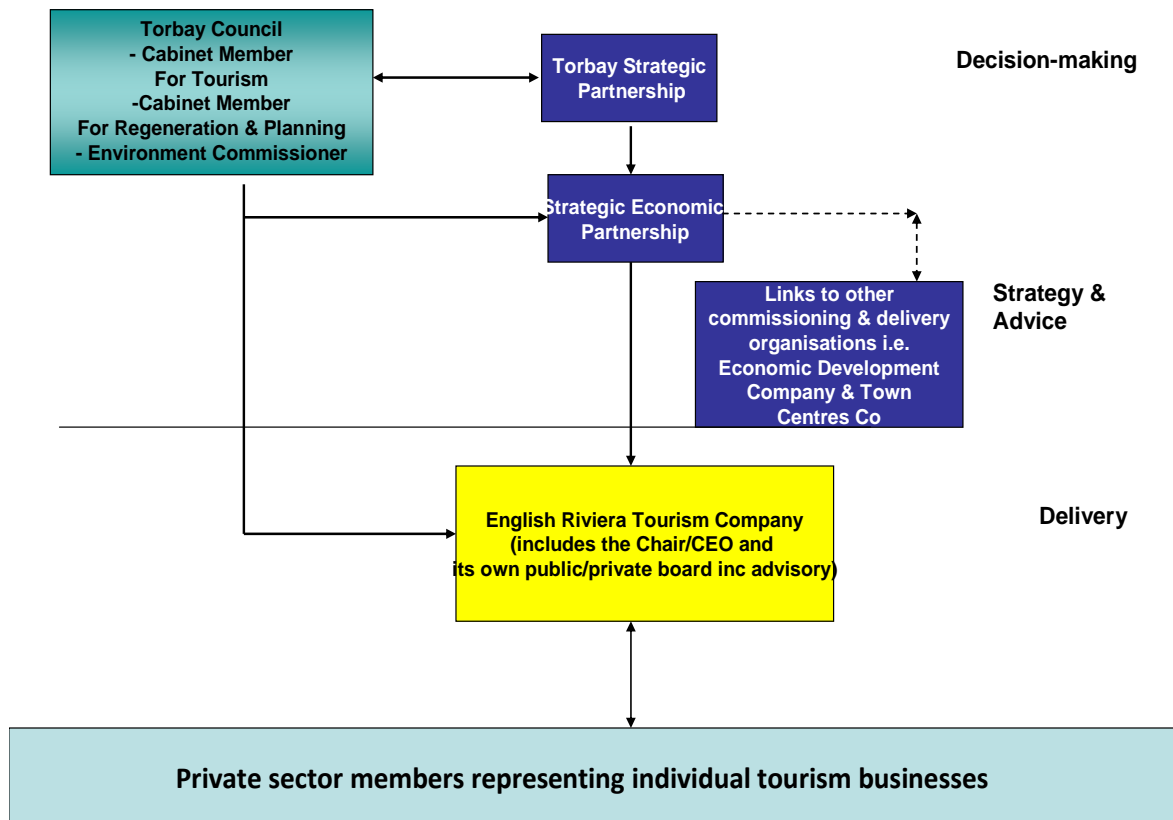
Governance and Structure

A structure and governance that facilitates integration and a more holistic committed partnership approach is crucial, as is the need for the new vehicle to provide stakeholder confidence and encourage engagement and investment.

It is proposed that new organisation would consolidate all current public sector promotional activities for the English Riviera which would ensure a single agenda, highly focused approach and the development of a strong and impactful brand.

Subject to further evaluation the proposed structure is shown below. The proposal for the legal status of the company is for it to be a limited by guarantee company adopting a Community Interest Company (CIC) legal status.

Proposed structure and linkage for the English Riviera Tourism Company



The proposed English Riviera Tourism Company would be commissioned by Torbay Council's Environment Commissioner, the client, key funder and contract manager. The English Riviera Tourism Company would act as the delivery agent.

Close alignment to the evolving Economic Development Company and existing Torbay Town Centre Company to assist with overall resort rejuvenation is essential.

Every member would be required to sign a 'charter of commitment' to partnership

Roles and Responsibilities

The Chair

The appointment of a widely respected chair from the private sector is needed, who will provide strong leadership and clarity of purpose. It is proposed that an appropriate remuneration should be assigned to this post. The vice chair should be from the public sector to demonstrate committed partnership working.

The Board

It is proposed that twelve non executive directors be professionally recruited with a majority of seven to five private sector directors proposed. Meeting regularly the board would be required to provide an annual report. The board members will act as passionate and positive ambassadors. Board compilation will include representation from the TDA/EDC Economic Development Company.

The Co-opted Advisory Panel

An advisory panel will be formed to bring additional knowledge and skills to support the main board. Members of it would be recruited from leading regional, national, public and private sector organisation and flag ship businesses. The co-opted advisory panel would not have voting rights.

The Chief Executive Officer

The appointment of a strong, passionate, positive and experienced tourism professional is strongly recommended. In addition to having responsibility of the day to day running of the English Riviera Tourism Company the CEO will have responsibility for being the official tourism spokesperson on behalf of the English Riviera.

Vision for the English Riviera Tourism Company

The English Riviera Tourism Company will be an inspirational, ambitious and forward thinking company that delivers confidence and works closely with stakeholders in delivering good value effective results.

Specific responsibilities will include:

coordinating and delivering the official marketing activities for the English Riviera

- maximising growth opportunities through the management of the product development action groups
- managing the delivery of visitor information services
- working closely with Torbay Council, EDC and Torbay Town Centres Company to assist resort rejuvenation
- coordinating local, regional and national industry liaison and communications
- maintaining one central accommodation database recording exact bed spaces
- the need for annual holiday occupancy surveys

Tourism Members

Members will be made up by all private businesses and associations wishing to align to the English Riviera Tourism Company. Every member will be required to sign a 'commitment to partnership' and will have one vote on key board decisions. No membership fee is proposed subject to the adoption of a Tourism BID.

Torbay Council

Torbay Council should resume responsibility as the core partner and funder of the English Riviera Tourism Company and for the delivery of overall visitor tourism infrastructure within the public realm including:

- clean environment
- beach management
- signage
- local public transport
- licensing
- parking
- toilets
- parks and gardens

Finance

The English Riviera faces some very serious challenges ahead as it continues to arrest the decline in the value of tourism. Significant investment from both the public and private sector will be needed.

Public Sector Finance

Support for tourism remains a discretionary spend by all local authorities across the country and is under increasing pressure.

Moving forward Torbay Council will continue to support the industry for a minimum of 5 years to enable the implementation of this strategy.

Private Sector Finance

Increased private sector investment will be needed moving forward to achieve the key objectives and in particular promote the destination effectively and attract new visitors.

The adoption of a Tourism Business Improvement District (BID) is proposed to secure the funds necessary. Adopting the BID model and a 1.5% increase in the ratable value of tourism accommodation and attraction business rates a minimum sum of £147k could be raised per year to increase the promotion of the destination.

This amount is significantly more than could be raised through operating an in house membership scheme. Should the Tourism BID process be rejected by the private sector a membership fee structure will have to be put in place and private sector sponsorship sought to deliver key objectives.

Regional Alignment

Significant changes have taken place in the South West as a result of the implementation of the Towards 2015 Regional Tourism Strategy. The delivery of this is overseen by the South West Regional Development Agency (SWRDA) as the core funder and South West Tourism (SWT) the strategic body for the industry.

Towards 2015 has three themes at its core:

- raising quality
- embracing sustainability
- effective destination management

Current regional strategy is being evaluated but will remain centered on the above core objectives with the focus on increasing the value of the industry, not the volume.

Alignment and commitment to regional policy by the new organisation is needed in order to provide a common focus on core objectives for the South West and in so doing closer alignment to South West brand values which in turn should start to attract the higher spending visitor that the English Riviera has long sought.

However regional alignment does come with a cost. Visit Devon, the county's official destination management organisation, operates commercially and has adopted a paid for membership scheme in order to raise sufficient funds to market Devon effectively as a destination.

Visit Devon is currently supported by five official Area Tourism Partnerships (ATPs) all of whom have committed to promote the joint Visit Devon membership scheme since its official adoption in April 2009.

The diagram below illustrates the current Devon platform in respect of tourism management further to the launch of Visit Devon in October 2007.



The English Riviera has chosen to delay embracing this new structure in order to review cost implications and to ensure best value for English Riviera tourism businesses. Negotiations are ongoing.

Adoption of the Visit Devon joint membership scheme is recommended. This would mean that English Riviera businesses that join the scheme can receive the profiling and marketing benefits that accrue from alignment with the county’s Destination Management Organisation. This includes promotion of the individual businesses on both Visit South West and Visit England.

Future alignment will also facilitate the English Riviera Tourism Company potentially benefitting from economies of scale including participation and shared costs in Devon national PR and marketing campaigns and in so doing position the English Riviera as a key player in the Devon tourism industry.

Taking part in any joint membership scheme with Visit Devon should be presented as optional. With a structure in place that facilitates local tourism businesses to take part in local English Riviera marketing activities should they choose to do so.

Key Actions to Enable Growth

transition action plan to be put in place by TBC and Industry Steering Group
Project Manager to be appointed to deliver transition action plan
external advice to be sought to verify proposed legal structure of English Riviera
Tourism Company particularly in respect of VAT implications
presentation of strategy to full council for adoption as policy document
joint Visit Devon membership scheme arrangements to be finalised
appointment of CEO for new company
preparation of agreed business plan and company framework
confirmation of confirmed company mandate
recruitment of chair and board
preparation of company constitution
preparation of staffing and supporting structures

Key Performance Indicators

Regarding evaluation and monitoring of the new company the adoption of Devon wide tourism key performance indicators (KPIs) are recommended in order to facilitate meaningful benchmarking moving forward.

value (£) of visitor economy
number of full time equivalent jobs
number of staying visitors (m) and average spend
number of day visitors (m) and average spend
discretionary spending of staying visitors using commercial accommodation (£m)
number of nationally accredited businesses compared to the rest of Devon
number of tourism businesses winning regional and national awards
number of new products introduced to address product gaps
number of tourism businesses working in partnership with new organisation

Glossary of Terms

ATP	Area Tourism Partnership
B&B	Bed and breakfast accommodation
BH&HPA	British Hospitality and Holiday Parks Association
BID	Business Improvement District
CEO	Chief Executive Officer
BRADA	British Resorts and Destinations Association
CIC	Community Interest Company
CLG	Company limited by guarantee
CMS	Content Management System
Consumer	Someone who purchases goods or services
CRM	Customer Relationship Management
Customer	Someone who purchases goods or services
Day visitor	Someone who visits for a day from a local or regional market
DCMS	Data Collection Management System operated by Visit England
DCC	Devon County Council
DDA	Disability Discrimination Act
Destination management	Management of all infrastructure and services for visiting tourists
DINKs	Dual income, no kids
DMO	Destination Management Organisation
DMS	Destination Management System
EDC	Economic Development Company
EEAE	Enjoy England Awards for Excellence
EFE	England for Excellence
ER	English Riviera
ERAP	English Riviera Attractions Partnership
ERGO	English Riviera Geopark Organisation
ERTB	English Riviera Tourist Board
ERTC	English Riviera Tourism Company
Flats and Houses	Self catering accommodation such as flats, houses, cottages not forming part of Holiday Parks
FOC	Free of charge
Gateway Locations	Major points/routes of arrival and departure
GTBS	Green Tourism Business Scheme
GVA	Gross value added, the national economic benchmark
HMOs	Houses of Multiple Occupancy
£k	£1000
Local area	The English Riviera
LDF	Local development framework
LGA	Local government association
Local market	Residents (and staying guests) of local and regional areas

Longer holiday	Leisure stay of 4 nights or more
Maritime Leisure	Water Leisure Activities
NOMIS	Official labour market statistics
NQAS	National quality assessment scheme
PHAAs	Principle holiday accommodation areas
PP	Per person
PPN	Per person per night
PR	Public Relations
Regional area	Devon, Cornwall, Dorset and Somerset
ROI	Return on investment
SEO	Search Engine Optimisation
Serviced Accommodation	Hotels, motels, guest houses, B&Bs, farmhouses, pubs
SF	Self funding
Short break	Leisure stay of 1 to 3 nights
SINKs	Single income, no kids market segment
SME	Small and medium sized enterprise
Sustainable tourism	Balancing the needs of the visitor and environment
SWOT	Strengths, weaknesses, opportunities, threats
SWRDA	South West Regional Development Agency
SWT	South West Tourism
TAP	Torbay Accommodation Providers
TCCT	Torbay Coast and Countryside Trust
TDA	Torbay Development Agency
TSCA	Torbay Self Catering Association
TTCC	Torbay Town Centre Company
TICs	Tourist information centres
THA	Torbay Hospitality Association
Touring Pitches	Touring caravans, motor caravans, tents and trailer-tents
USP	Unique selling point
VAQAS	Visitor Attraction Quality Assurance Scheme
VB	Visit Britain
VD	Visit Devon
VE	Visit England
VFR	Visiting Friends and Relatives
Visitor	Someone who visits the English Riviera as a tourist
VOT	Value of Tourism (statistics produced by SWT)
%	Percentage

Turning the Tide for Tourism in Torbay was prepared on behalf of the Torbay Development Agency and Torbay Council by Close Focus Tourism Consultancy

This document can be made available in other languages and formats.
For more information please telephone 01803 208973.