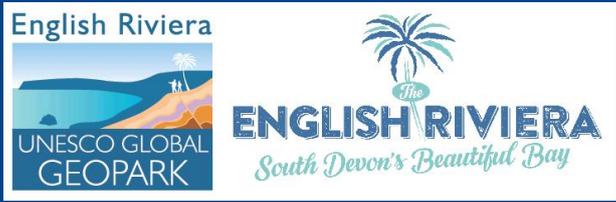




2016-2021

English Riviera Destination Management Plan 2016-2021 - Draft

Pride in Place



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INTRODUCTION

A Destination Management Plan (DMP) is a concept and shared approach to effectively manage the whole tourism destination. Focussing on developing a successful visitor economy, the Plan presents clear actions and the different stakeholders involved to take the DMP and the destination forward.

VisitEngland VisitBritain sees the development of Destination Management Plans, which are increasingly being introduced across regions, as an essential tool further supporting Government policy, encouraging destination organisations to become focussed and efficient.

Having a clear and structured Plan will focus collaborative effort, reduce duplication and maximise local investment. This is therefore the right approach for the English Riviera; Making the most of available resources, working in collaboration with key stakeholders and the industry to effectively develop the visitor economy. Working in closer partnership also maximises Torbay's chances of making the most of funding opportunities to support the development of the visitor economy and importantly the development of more world-class visitor experiences.

TDA on behalf of Torbay Council has conducted a wide range of industry research to support this Destination Management Plan which can be viewed in the supporting evidence document.

EXECUTIVE SUMMARY

The English Riviera as a premier UK coastal resort faces an exciting future. Since 2010 staying domestic visitors and day visitor numbers have increased, supported by year on year visitor spend.

This new Plan, presented in a revised format as a new Destination Management Plan, aims to harness the momentum and work collectively achieved in partnership, further strengthening the English Riviera's national and international position, which has seen the following achievements since the 2010-2015 *Turning the Tide for Tourism Strategy*:



- 12% increase in UK visitors with a 8% increase in spend; 1% increase in overseas visitors and -3% in spend.¹
- Achieving UNESCO Global Geopark status, based on the English Riviera's outstanding internationally significant geological and cultural heritage.
- Charitable status secured for the Agatha Christie Festival, securing Arts Council funding for international development.
- Increasing the number of quality 5*/Boutique B&Bs – including *The 25*, which is top scoring on TripAdvisor in the Country and has also received recognition in VisitEngland's Top 100 businesses.
- Businesses continue to be awarded national Bronze, Silver and Gold Service Awards.
- Achieving and maintaining Purple Flag status for the destination's night time economy and Blue Flag and Beach Awards status.
- Official Visitor Information Service achieving Silver VisitEngland Award.
- Maintaining and securing jobs in tourism.
- The future of destination marketing secured through the establishment of the new English Riviera Tourism BID Company.
- 1.5m annual unique visitors to the official English Riviera website.
- ERTC's 'The English Riviera, South Devon's Beautiful Bay' widely adopted across the resort and by transport operators.
- Successfully delivering the 2016 International UNESCO Global Geopark conference from 63 countries.
- Partnership working with Visit Devon, South West Tourism Growth Fund, VisitEngland and VisitBritain to raise the profile of the resort and maximise opportunities for future growth.
- Private investment in product developed has increased, including the refurbishments of hotels improving the quality of accommodation from 2* to 3*.

¹ 2010:2015 English Riviera Visitor Data

- Noticeable investment in the International Language Schools accommodation.
- Development of three new Premier Inns and new 5* boutique spa beach huts.
- New high quality restaurants, cafés and bars including the popular Abbey Sands development.
- New children's GeoPlay Park on Paignton Green.
- Award-winning outdoor activity provider.
- More berths for leisure vessels in Torquay Harbour.
- New cycle routes have been introduced.

Objectives

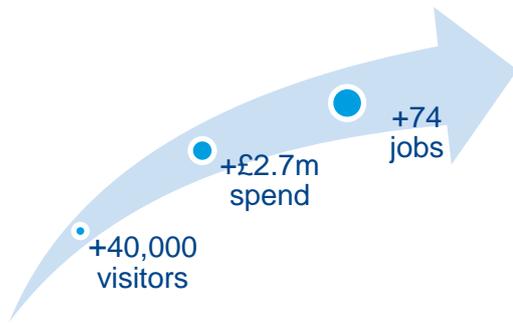
The 2016-2021 Destination Management Plan is underpinned by extensive consultation which has invited tourism stakeholders across private and public sector locally to share their views.

The overall Objectives for The English Riviera's Destination Management Plan will be to deliver a series of agreed key actions, delivered in partnership with local stakeholders, to strengthen and develop the English Riviera's tourism offer by achieving the following:



To help illustrate these Objectives, **by achieving a 5% increase in three shoulder months** we can expect to see²: 40,000 additional visitors, (average 13,330 extra visitors per month), £2.7m additional spend, (average £895,944 per month) and 74 additional jobs created/supported (mix of direct/indirect/induced).

² South West Research Company projections using 2014 visitor economy data

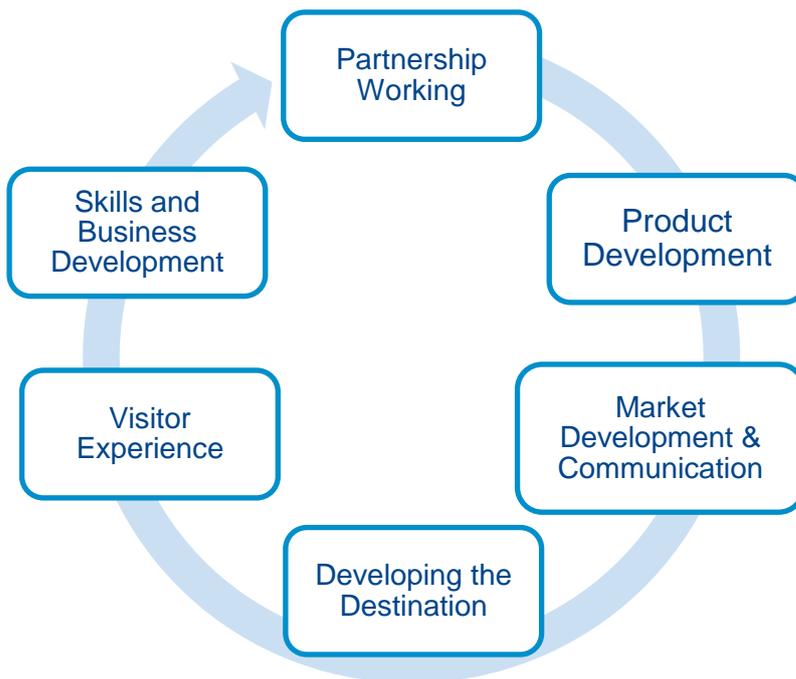


(Note: Illustrative example of 5% growth over three shoulder months).

The Future

Consumer consultation has highlighted there are six key priorities for action, which are all connected to ensure the success of the English Riviera’s visitor economy. Whilst these actions can stand alone, there is likely to be some overlap (i.e. developing the destination will also have an impact upon marketing and communication).

Outline of priorities for action:



- Priority 1: Partnership Working** – what do we need to do to deliver the Destination Management Plan? Working collectively with joint responsibility for managing the destination in a collaborative way is essential for the growth of the English Riviera’s visitor economy.
- Priority 2: Product Development** - what quality products do we need to develop to meet the needs of new and existing visitors? Strengthening the English Riviera’s all year round product, extending the season and jointly developing an increased number of compelling visitor experiences is one of

our key priorities; as well as building on the success of quality assets the UNESCO Geopark and Agatha Christie programmers to date to attract new International and UK visitors.

- **Priority 3: Market Development and Communication** - where are the new and emerging markets which present the best opportunity and how do we best communicate to existing and new visitors through destination marketing? Making the most of our existing assets and all year round destination to attract new UK and International visitors is a key focus for marketing the English Riviera.
- **Priority 4: Developing the Destination** - what needs to be done to improve the physical destination? Maintaining focus of the visitor economy to ensure the English Riviera remains an attractive destination to live, visit and work is essential to grow the visitor economy.
- **Priority 5: Visitor Experience** - what do we need to do to make sure the visitor receives the best welcome and a quality experience? Ensuring the English Riviera as a destination offers a quality experience across the whole resort, welcoming new visitors and encouraging their return is one of key priorities.
- **Priority 6: Skills and Business Development** - what do we need to do to ensure we have the right key skills, including online digital, to meet visitor needs and expectations? Supporting tourism businesses and developing skills is essential to develop the destination, working collaboratively in partnership a key focus of this priority.

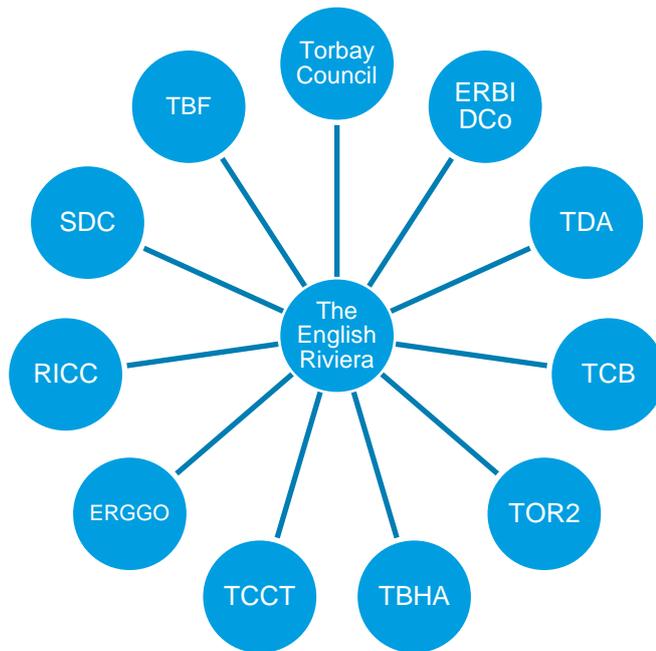
To take this Destination Management Plan forward, which is essential for future growth, the Plan recommends developing a joined up collaborative approach for tourism, working in partnership with stakeholders and the industry to develop the English Riviera's visitor economy.

The creation of a new Destination Management Group (DMG) whose shared vision is to manage the visitor economy and to deliver the Plan's objectives, will bring key stakeholders together across all sectors to effectively develop and promote the English Riviera tourism offer. Governance and the DMG's Terms of Reference will need to be established and forms the basis of Priority One in the Action Plan.

Key stakeholders of the Destination Management Group include:

Torbay Council, English Riviera BID Company, TDA, Torbay Culture Board, TOR2, Tor Bay Harbour Authority, Torbay Coast & Countryside Trust, English Riviera Global Geopark Organisation, Riviera International Conference Centre, South Devon College and the Torbay Business Forum.

Whilst, these are the leading organisations, as the Plan develops additional members may be identified and invited to the Group.



As part of the collaborative working approach and the shared vision to develop the destination’s visitor economy, building effective strategic partnerships (local and regional) is essential for the future of tourism in The English Riviera.

A **Sub Reference Group** will also be established, to work underneath the DMG and who can be called upon on an ad-hoc basis to support the development of the Action Plan.

Members of the Sub-Reference Group will include private sector representatives across all sectors including retail, as well as organisations such as Torbay Licensing Forum, South Devon Chamber and Transport Operators – Stagecoach, First Great Western, local Boat Operators and Exeter Airport.

Summary

The English Riviera is a leading UK seaside destination. Marketing and promoting the destination brand, led by the new English Riviera BID Company, will ensure Torbay is first choice for visitors when choosing their next visit, whatever time of year.

This Destination Management Plan will ensure the whole destination and its tourism businesses are supported and developed. This in turn will lead to improved infrastructure and skills, increasing jobs and the improving the visitor economy for a more sustainable future, benefiting visitors, residents and businesses.

The Destination

Situated within the stunning, rolling hills of South Devon, The English Riviera covers 24 square miles, comprising of the three towns Torquay, Paignton, and Brixham. Located around the east-facing natural harbour of Tor Bay, the area includes part of the South West Coast Path, has 18 sandy beaches and is in close proximity to Dartmoor National Park.

The area's attractive coastline, mild climate, recreational and leisure attractions have won the English Riviera the title of England's Top seaside destination³, and has been included in the Top 10 destinations for the past three years.

In September 2007, the English Riviera received International recognition for its rich geological, historical and cultural heritage and Torbay became a Global Geopark. The designation has full UNESCO programme status that has so far only been awarded to 120 destinations in the world.

This new English Riviera Destination Management Plan will build on the success of the *Turning the Tide for Tourism in Torbay* Strategy. Moving forward, making more use of the area's natural assets to develop and all year round offer, defining compelling marketing messages and products to reach new International and UK visitors, increasing the quality of the tourism offer and maintaining the resort's position as a leading South West coastal destination.

Current Situation

In 2015, the English Riviera attracted **4.6m visitor trips, spending £436m in the resort, employing 20% of the local population⁴.**



2015 Headline Facts⁵:

Trips

- 4,568,600 Trips were taken:
 - 1,084,000 Domestic trips
 - 95,600 Overseas trips
 - 3,389,000 Day trips

Visitor Spend

- Visitors spent a total of £436,040,000:
 - £274,410,000 Domestic visitors
 - £36,307,000 Overseas visitors
 - £125,323,000 Day visitors

Nights

- 4,595,800 Total nights:

³ TripAdvisor 2015 Travellers Choice Awards

⁴ South West Research Company 2015 Visitor Data

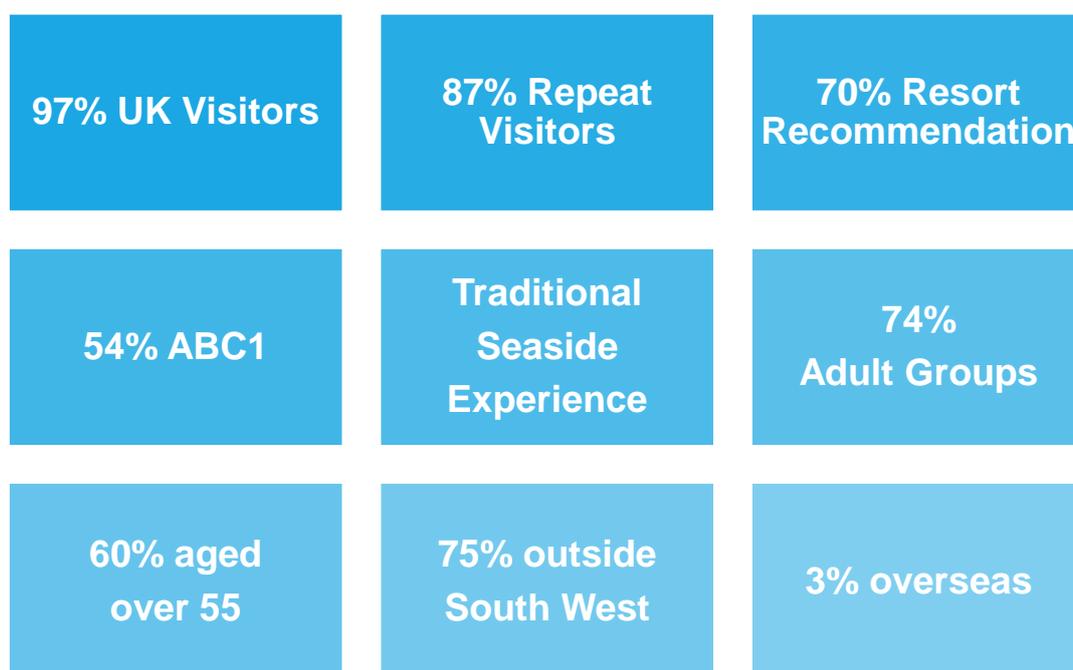
⁵ South West Research Company 2015 Visitor Data

- 4,033,000 Domestic visitors
- 562,800 Overseas visitors

This confirms the English Riviera as a popular South West seaside destination and is attracting more visitors, securing year on year growth of its visitor economy. With market trends changing, visitors are now staying for a shorter period of time. The average length of nights recorded in the official English Riviera 2015 data is 5.89⁶ nights (and 4.76 in the 2016 visitor survey).

Key Trends and Achievements

The results of the 2016 visitor survey*⁷ confirms the English Riviera continues to be a popular South West seaside destination and is highly thought of by its current visitors. There are many positives and developments which have come through the research and when comparing the findings against the last visitor surveys in 2012/13 (further analysis is detailed in the supporting evidence appendix).



Summary Points:

- The resort has a strong and loyal market attracting 97% of visitors from the UK and has an 87% repeat visitor rate.
- Resort promoters have significantly increased, reaching a high recommendation score of 70%, (increasing from 42% in 2012/13).
- The English Riviera attracts affluent visitors, with 54% of ABC1's recorded in the 2016 visitor survey (49% in 12/13).
- 62% of visitors look for a 'traditional seaside experience' and is the main reason for visiting.
- The area has a strong family market, seeing an increase in the proportion of families visiting (predominately during the peak summer months and main school holiday periods).

⁶ South West Research Company 2015 Visitor Data

⁷ English Riviera Visitor Survey 2016

- 75% of the resorts visitors surveyed in 2016 were from outside the South West region, (an increase from 66% in 2012/13).
- The majority of staying visitors are without children in adult only groups (74%).
- Torbay has an ageing visitor profile, with the majority of current visitors 60% aged over 55.
- 3% of all 2016 visitors surveyed were from overseas.

*Note - the results of the 2016 visitor surveys are indicative of the period of completion.

STRATEGIC CONTEXT

Local Context

i) Torbay Council

Torbay Council's Corporate Plan focuses on creating a prosperous and healthy Torbay. The need to ensure Torbay remains an attractive and safe place to live, visit and work is one of the key areas for focus within this plan.

The Council's Economic Strategy 2013-2018 and Local Plan sets out the need to create more employment in Torbay and the need to continue to secure investment in support of the right infrastructure for economic growth including road, rail and broadband as well as sites and premises.

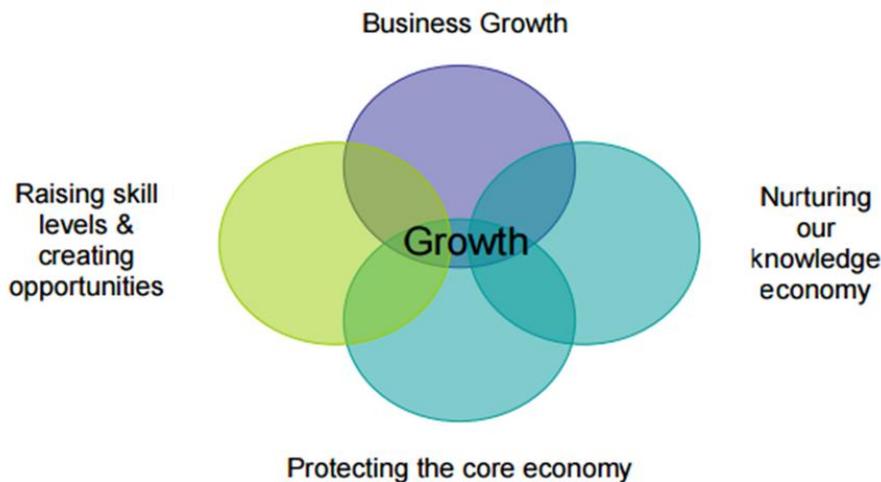
In December 2015, following extensive public engagement, Torbay Council adopted the new Local Plan. The Plan recognises that Torbay has a strong USP that is the English Riviera, with a world-class tourism offer. The Plan supports and enables enhancement of that offer.

The Local Plan provides a framework for growth, investment and planning decisions in Torbay. It includes policies for managing change and development in Torquay, Paignton and Brixham. It also includes policies for tourism – taking into account the priorities of the 2010-2015 tourism strategy. It identifies Core Tourism Investment Areas (CITAs) which are shown on the Local Plan maps. The CITAs replace and reduce the previous Principle Holiday Accommodation Areas (PHAAs). The policies provide a supportive framework for the needs of the tourism sector, whilst also recognising the changing nature of the tourism landscape. The new policies are designed to improve the quality of accommodation and facilities in the resort. The plan recognises key areas for tourism development, which includes retail and night-time economy and more specifically under Policy TO1 tourism, events and culture. Policy TO2 seeks to keep the best tourism accommodation and protect the character of CITAs. Outside CITAs there is greater scope for change, where this does not have a negative impact on Torbay's USP.

In the three years before April 2016 the Council approved 9 planning applications for completely new holiday accommodation; 29 applications were allowed which involved the loss of holiday accommodation and 9 applications were allowed for investment in holiday accommodation (additional bedrooms/new facilities).

ii) TDA

Lead by the TDA, the priorities and actions contained in the Torbay Economic Strategy are proposed to create the conditions for sustained job growth and earnings equality in Torbay; attracting inward investment and new businesses to the area, for the key sector of Tourism and for the development of skills and reduction of unemployment in Torbay.



iii) The English Riviera Tourism Company (ERTC)

The English Riviera Tourism Company holds responsibility for tourism marketing for the destination; recent arrangements for tourism management have shifted with the creation of the new English Riviera Tourism BID Company, will manage destination marketing with a new Business Plan 2017-2022. The overall requirement is for Tourism in Torbay to be effectively managed and marketed through public and private partnership arrangements to ensure the onward sustainability and effectiveness of this service.

The 2005 Tourism strategy outlined the need to improve customer service and quality; improve partnership working; need for product development to attract new customers. The 2010- 2015 tourism strategy 'Turning the Tide for Tourism in Torbay' further built on this with a greater emphasis on market led product development and the modernization of the tourism offering.

Regional Context

a) Devon

A Strategy for Growth 2013 – 2020 (Devon County Council)

Devon County Council's (DCC) Strategic Plan is focused on a 'strong, healthy and prosperous' Devon and actions to improve the quality of life for all who live, work and visit the county. The overarching vision for Devon is clearly stated in the Strategic Plan (2011-2015) 'Backing Devon': To improve the quality of life for the people who live, work and visit the county. The Strategic Plan also has a separate vision to create: A flourishing and balanced economy, with strong economic growth and high quality employment. All of these plans focus on key elements which have an effect on the wider visitor economy, such as transport, skills and investment, as well as 'tourism' sector specific activities.

This sectoral development approach was identified through SERIO⁸; to provide a coherent and evidence based rationale for supporting targeted priority sectors, as well as recognising the important economic role played by sectors such as tourism. DCC will continue to ensure that appropriate support is provided through involvement in the Devon Tourism Partnership to promote Devon as a top quality destination, as well as seeking out opportunities to market and showcase the county to its best effect. This will enhance the natural environment and events such as the Tour of Britain which provide an additional way of marketing Devon to a national audience.

⁸ SERIO, part of Plymouth University, provides specialist social, economic and market research regionally and nationally.

The former Devon Tourism Partnership (DTP) comprised Devon County Council, the English Riviera Tourism Company, Destination Plymouth, Visit South Devon, North Devon Plus, Visit Dartmoor, Exeter & the Heart of Devon, and the Devon Association of Tourist Attractions (DATA), working together to:

"To protect and promote the Visit Devon brand, enabling growth of the Devon tourism sector"

The new Visit Devon was set up following local tourism industry consultation during 2015, with businesses championing one strong and effective voice for Devon's tourism sector. The Community Interest Company (CIC) will work on behalf of the tourism and hospitality industry to promote Devon within the UK and overseas to attract new and additional visitors to the county. It will take over from the DTP which led the promotion of Devon since 2011.

Visit Devon has two primary objectives: to promote and market the county of Devon as a tourist destination and to act as an official voice for those involved in Devon's tourism industry. It is a non-profit making business with any surpluses generated being reinvested into further promoting Devon as the holiday destination of choice.

b) Heart of the South West LEP

The Heart of the South West LEP's mission statement is 'to make our area the place of choice to live, work, learn, **visit** and invest; we want to achieve sustainable and skilled jobs, improved productivity and economic growth in order to achieve prosperity'.

Central to the Heart of the SW strategy is a balanced approach to growth, which recognises:

- The need to address wider productivity barriers and maximise the benefit from specific opportunities for high growth;
 - The need to create job opportunities where opportunities are few as well as better jobs to drive up average wages;
 - The need for economic growth to benefit both rural and urban people, businesses and places.
- To ensure long-term, sustainable growth, the DMP addresses the need to get the underlying conditions right; there are a number of areas of activity which will help to address wider productivity barriers and supporting specific opportunities for high growth, which will have a positive impact on the visitor economy:
- Better connectivity through a faster, more resilient transport system – road and rail.
 - Improved digital connectivity through the Connecting Devon and Somerset programme
 - Increased business competitiveness through the expansion of our Rural Growth Network pilot and the development of GAIN (business support and advice)
 - Improved workforce skills through the investment of European Structural and Investment Funds into skills training and workforce development.

National Context

Tourism in England generates £85bn a year for the economy and employs over 2.6 million people. Latest figures⁹ for domestic overnight tourism indicate that there were over 43m holidays, 40m visiting friends and family and 14m business visits. Inbound tourism saw 12m holidays, 10.5m visiting friends and family and 7.5m business visits.

The importance of the tourism sector is recognised by Government as is the need to support the growth of the industry. The Government's 5 point plan for Tourism¹⁰ is designed to promote the UK as a GREAT place to visit; to support conditions which expand and develop the tourism offer across the country; and is focused on:

- **Tourism Landscape** – improved co-operation amongst destination organisations and simplify funding
- **Skills and Jobs** – support business growth and attract and retain talent in the industry
- **Common Sense Regulation** – continually review the regulatory framework to protect and grow the tourism sector
- **Transport** – develop closer links between the tourism industry and transport to make it easier for visitors to access venues and attractions outside of the capital
- **A GREAT Welcome** – ensure all visitors to the UK receive a warm welcome and good first impression at our Borders

In 2016, the Government published an update to the 5 point plan designed to strengthen co-ordination and collaboration across the tourism landscape:

- Establishing an inter-ministerial group on tourism to co-ordinate and oversee action across Government.
- Re-vamping the Tourism Industry Council, bringing Industry and Government together.
- Establishing a new Events Industry Board to co-ordinate and enhance the UK offer on events and exhibitions.
- Changing the governance arrangements of Visit England Visit Britain to ensure collaboration and grow tourism in England and Britain.
- Announced a new Discover England Fund to incentivise the destination organisations to join up and build world class tourism experiences and products across England.

⁹ Tourism in England – Key Facts and Trends 2015

¹⁰ Backing the Tourism Sector

Visit England / Visit Britain

Tourism is worth £126.9 billion to Britain's economy, is Britain's seventh largest export industry, and inbound tourism's economic contribution is currently valued at £26.2 billion¹¹.

VisitEngland VisitBritain* focuses on building England's tourism product, raising Britain's profile worldwide, increasing the volume and value of tourism exports and developing England and Britain's visitor economy. Their mission is to grow the volume and value of inbound tourism across the nations and regions of Britain and to develop world-class English tourism product to support our growth aspirations.

Developing world-class English tourism product: Developing and delivering the Discover England Fund, which aims to drive inbound visits and spend and support the domestic market through the delivery of world-class, stand-out, online bookable tourism products. £40m has been allocated for the Discover England over 3 years (2016/17-2018/19) and £22.8m GREAT funding for 2016/2017.

As part of Round One, the English Riviera Tourism Company (ERTC) successfully secured funding and launched in October 2016, an exciting new project from the Discover England Fund. England's Seafood Coast sets out to establish the English Riviera as an international seafood destination, complementing growing interest internationally in quality food and drink.

Collaborating globally: Connecting with a global audience across four regions - Europe, the Americas, Asia, China and North East Asia; implementing strategies which are based on customer insight, knowledge of the barriers to inbound tourism growth and solutions for addressing them. For the South West, the five key overseas target markets, as identified by the South West Tourism Fund as presenting the greatest opportunity for growth are German speaking markets, Netherlands and Belgium, USA, Scandinavia and the Republic of Ireland. Adopting this targeted approach will make the most of available marketing resources.

Inspiring the world to explore Britain: Focusing on content creation, curation and distribution for England and Britain. From 2016/17, business visits and events are a priority area for England and, at a Britain level, working across Government to deliver key industry sector events.

A trusted partner and advisor: Offering world-class market insights, trends and performance analysis across sectors, providing the industry with the research needed to build their tourism business and encourage marketing that's inspirational and relevant, alongside better targeted product development.

*VisitEngland VisitBritain are legally constituted as the British Tourist Authority (BTA) under the Development of Tourism Act 1969.

Funding for Tourism

The visitor economy landscape has changed significantly over the past 20 years, with the industry being encouraged to grow, develop and generate investment to deliver growth through a new financial landscape for destination marketing. Tourism Business Improvement Districts (TBIDs) are designed to directly support the development of the tourism sector within a specific destination, with over 100 now in place across the UK and over 1,000 in the USA.¹² The new English Riviera Bid Company Ltd will therefore manage destination marketing for the resort with a new Business Plan 2017-2022.

¹¹ VisitEngland

¹² VisitEngland

Funding opportunities for tourism need to be maximised for tourism investments (infrastructure, product development and skills) and the Destination Management Group will take a collective role to identify new funding sources, working together with industry to support the growth of the English Riviera's visitor economy.

Funding sources include:

- **Arts Council**
- **VisitEngland VisitBritain Discover England Fund**
- **Coastal Communities Fund**
- **Heritage Lottery Fund**

KEY FACTS, FIGURES AND INTELLIGENCE

Value and Volume

Torbay's key facts and figures on the value and volume of visitors are taken from the Economic Impact of Devon's Visitor Economy, using the Cambridge Impact Model.

2015 Headline facts¹³

Trips

- 4,568,600 Trips were taken:
 - 1,084,000 Domestic trips
 - 95,600 Overseas trips
 - 3,389,000 Day trips

Visitor Spend

- Visitors spent a total of £436,040,000:
 - £274,410,000 Domestic visitors
 - £36,307,000 Overseas visitors
 - £125,323,000 Day visitors

Nights

- 4,595,800 Total nights:
 - 4,033,000 Domestic visitors
 - 562,800 Overseas visitors

¹³ South West Research Company

2010:2015 Comparison

To show how visitor numbers and spend has moved on since the Turning the Tide 2010-2015 Tourism Strategy, data has been compared to show the following:

- UK Domestic Visitors have seen a 12% increase in trips from 967,000 in 2010 to 1,084,000 in 2015
- UK Domestic Nights have increased by 4% from 3,881,000 in 2010 to 4,033,000 in 2015
- UK Spend also increased from £220,433,000 in 2010 to £274,410,000, which equates to an 8% increase when compound inflation is taken into account.

Overseas Visitors

- Overseas visitor trips increased by 1% from 94,500 in 2010 to 95,600 in 2015
- Overseas nights decreased by -6% from 597,000 in 2010 to 562,800
- Overseas spend appears to have increased by 1% from £35,941,000 in 2010 to £36,307,000 in 2015, however when compound inflation is taken into account it is a decrease of -3%.

Day Visits

- 2,537,000 Day Trips were taken in 2010 increasing by 34% to 3,389,000 in 2015
- Day Trips spend overall has increased from £120,873,000 in 2010 to £125,323,000, however when compound inflation is taken into account it is a decrease of -7%.

Trips by Purpose

- The English Riviera is a popular domestic holiday destination accounting for 82% of trips in 2015 (74% in 2010)
- UK business trips accounted for 16% of visitors to the resort in 2010, decreasing to 13% in 2015.
- Visiting Friends and Relatives (VFR) accounted for 8% of visitor trips in 2010 and 6% in 2015.
- Overseas visitors to the English Riviera visiting VFR accounted for 6% of trips in 2010 increasing to 20% in 2015.

2015 Devon Data:¹⁴

- 33,886,000 trips were taken in Devon:
 - 5,290,000 domestic
 - 464,000 overseas
 - 28,575,000 day visitors
- Visitors spent a total of £1,370,934,000
- 28,575,000 day visits - spent a total of £1,013,711,000, an average of £35.48 per trip
- UK staying visitors – stayed an average of 3.98 nights, with an average spend £222.25

¹⁴ South West Research Company

- Overseas visitors – stayed an average of 7.53 nights, with an average spend £420.72.

When comparing the English Riviera to other Devon destinations we can see how well the resort is performing in 2015¹⁵:

	UK Trips	Overseas Trips	Day Visitors	Total Visitor Spend*
English Riviera	1,084,000	95,600	3,389,000	£436,040,000
Teignbridge	573,000	37,500	3,516,000	£253,484,000
Plymouth	637,000	76,000	4,252,000	£316,553,000
North Devon	937,000	26,000	2,964,000	£345,512,000

Domestic, overseas and day visitor spend

2015 South West Data¹⁶

- 170,926,000 trips were taken in the South West:
 - 20,770,000 domestic
 - 2,410,000 overseas
 - 147,746,000 day visitors
- Visitors spent a total of £11,021,990,000:
 - £4,596,910,000 domestic
 - £1,097,380,000 international
 - £5,320,770,000 day visitors
- 147,746,000 day visits - spent a total of £5,320,770,000, an average of £36 per trip
- UK staying visitors – stayed an average of 3.61 nights, with an average spend £221.32
- Overseas visitors – stayed an average of 7.92 nights, with an average spend £455.34

Comparative data South West regions:

	UK Trips	Overseas Trips	Total Spend	Day Visitors	Day Visitor Spend
English Riviera	1,084,000	95,600	£310,717,000	3,389,000	£125,323,000
Devon	5,290,000	464,000	£1,370,934,000	28,575,000	£1,013,711,000
Cornwall	4,210,000	319,000	£1,373,437,000	13,988,000	£491,755,000
Dorset	3,193,000	346,000	£886,066,000	28,575,000	£1,013,711,000
Somerset	1,818,000	167,000	£392,365,000	13,969,000	£481,656,000

¹⁵ South West Research Company

¹⁶ South West Research Company

2016 Visitor Survey

Key Findings Summary:

The 2016 visitor surveys show the English Riviera remains a popular holiday destination. It has a strong and loyal UK market attracting 97% of its visitors from the UK and has an extremely high repeat visitor rate of 87%.

Key changes since the 2012/13 visitor survey include:

- **An large increase in the recommendation score** – an increase in resort ‘promoters’ and recommendation score increasing from +42% to +70%.
- **Strong family market** - an increase in the proportion of families visiting the English Riviera, predominately during the peak summer months and main school holiday periods.
- **More affluent visitors are visiting** – the proportion of ABC1’s visiting the English Riviera has increased to 54% from 49% (in 2010/13).
- **50% of all visitors are in full time employment** - increasing from 43% (in 2012-13).
- **60% of all visitors surveyed were aged 55+**, (including 31% who were aged 65 years or older) – increasing from 44% (in 2012-13).
- **74% of adults** were visiting the resort without any children
- **62% of visitors look for a ‘traditional seaside experience’** when deciding upon their holiday destination.
- **75% of all 2016 visitors were from outside the South West region**, (increasing from 66% in 2012/13)
- **23% of visitors lived within the South West**, (compared with 31% during the 2012/13 survey),

2016 LAPSED VISITOR SURVEY

Key findings summary:

- 67% of lapsed visitors were aged 55+ years, (including 30% who were aged over 65).
- 43% were in full time employment.
- 43% of lapsed visitors also said that they would be ‘very likely’ to re-visit in the future and a further 37% would be ‘likely’.

The most sought after attributes when choosing which destination to visit included:

- Rest and relaxation (77%)
- Quality food and drink (77%)
- Traditional seaside experience (68%).

Whilst respondents confirmed that the English Riviera provided the attributes they were seeking, they had chosen not to visit because:

- a) They had chosen to visit another destination instead (63%)

- a) 48% said it was because they had chosen to visit another destination instead:
- b) 43% said it was because of a lack of money/available finances.
- c) 26% said it was too far for them to travel from their home.

Destinations such as Cornwall, Wales, North Yorkshire and Devon are prominent as well as a wide range of other locations in the UK and further afield:



OTHER LOCATIONS – NON VISITORS	
OTHER DEVON	8%
OTHER SW	21%
OTHER UK	51%
OTHER EUROPE	16%
REST OF WORLD	4%
	100%

15% of non-visitors said there was something specific about The English Riviera which had deterred them from visiting. Noticeable main reasons include lack of resort awareness, quality, type and style of desired accommodation and the weather are prominent:



2016 Industry Survey

Key findings summary:

The results of the industry survey show Tourism in Torbay is very positive and businesses are generally using a mix of marketing, they recognize the importance of being digitally visible and value communication and providing information to visitors.

Marketing and use of Digital:

The majority of businesses, 97% said they had a website and 76% said they were using social media. 72% of business said they used targeted marketing to attract a certain type of visitor.

Communication and Information:

The majority of Torbay tourism businesses recognise the importance of reviews and are engaging online; 79% of businesses read customer reviews on TripAdvisor; 63% respond to positive reviews.

On visitor enquiry, 75% of businesses provide information to visitors via their website, 69% by phone and 68% by email; 81% provide information leaflets onsite as well as in person and through their websites; and after the visit, 45% engage with visitors by email, 37% via their websites and 31% by Facebook – showing digital communication is the most commonly use format post visit.

Training:

On average, a third of all businesses said training was not relevant to their business and a third of businesses do not provide any training at all.

The majority of businesses that do provide training, use in house methods on a range of key topics:

- Customer service
- Dealing with customers with special needs
- Providing local area information
- Social media
- Website SEO and analytics
- Leadership and management
- Business planning for growth
- Market research/attracting new customers

Trading, Challenges, Trends and Business Confidence :

71% of Torbay businesses are confident for the future, responding they are very confident (19%) or fairly confident (52%) for the next five years.

61% of all business responded said they have plans to develop their business in the next five years, including plans for refurbishments; increasing bed spaces; improving the quality of their offer; Increasing direct bookings; improving customer service; increasing revenue above VAT threshold.

- The core months of trading for Torbay businesses are April – September.
- 85% of businesses were also closed in October and 81% are closed in March.
- 63% of tourism business said they are open all year.
- 36% of businesses not currently trading all year said they would consider all-year round opening if more promotion took place.

Half of all businesses (49%) said they encountered problems due to seasonal nature of tourism. Key issues stated were:

- Attracting visitors out of season
- Cash flow problems
- Off peak demand
- Profitability
- Recruitment and retention of seasonal staff

Torbay Accommodation

Supply

2015 accommodation shows a total of 20,595¹⁷ bed spaces across a wide mix of accommodation type across Torbay:

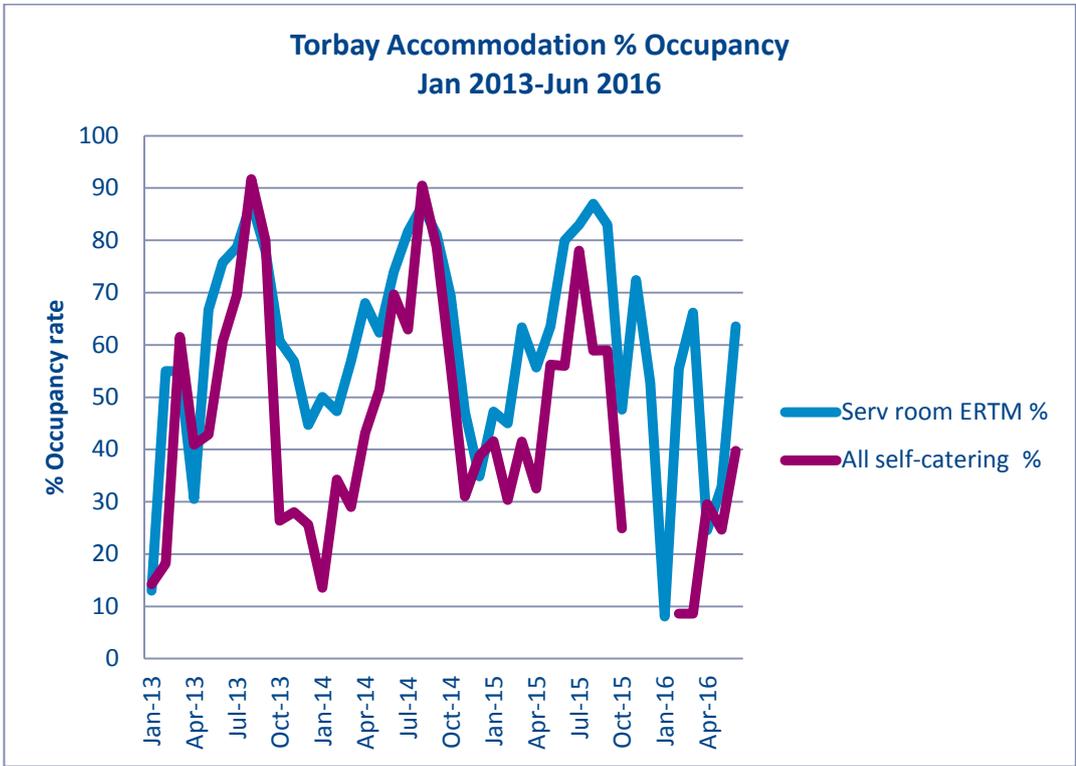
Hotels	9,404	bedspaces
Guesthouses	4,123	bedspaces
Inns	22	bedspaces
B&B	458	bedspaces
Farms	0	bedspaces
Self catering	1,127	units
Touring caravans/tents	1,286	itches
Static vans	404	itches
Holiday centres	1,336	units
Group accommodation	84	bedspaces
Campus	50	bedspaces
Second homes	1,206	units
Marinas	1,095	berths
Language schools	9	establishments

Occupancy

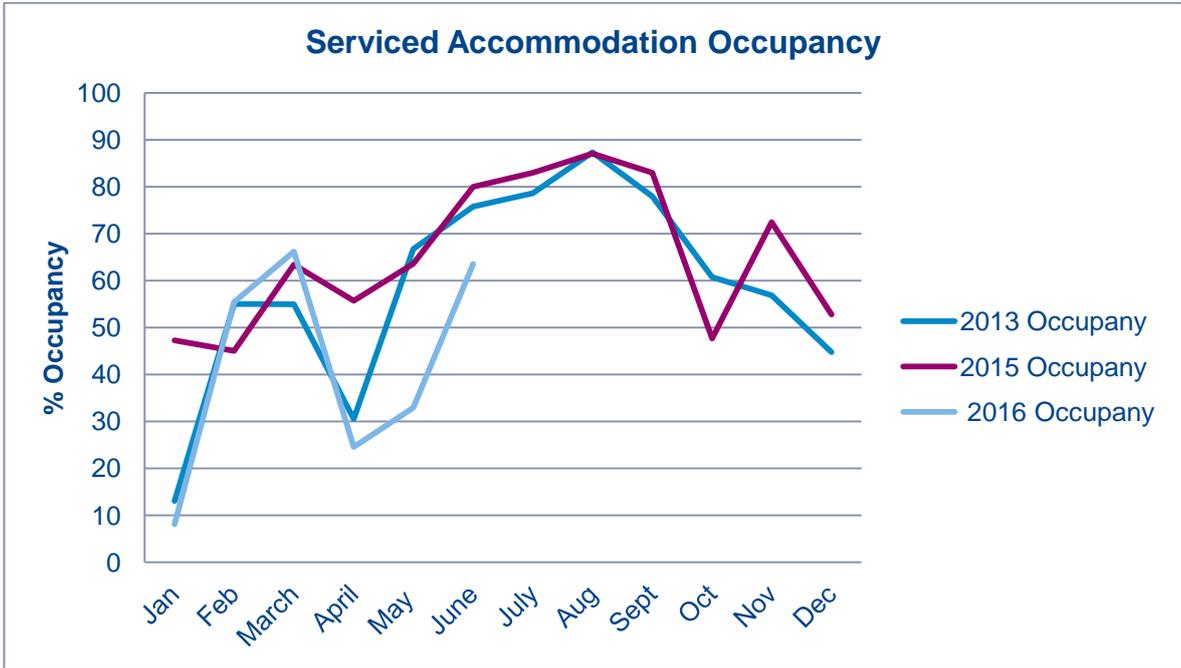
The *How's Business Surveys* were undertaken by The South West Research Company on behalf of the English Riviera Tourism Company from January 2013 - June 2016. The evidence from this research confirms Torbay's extreme seasonality during the summer months and the main school holiday periods.

The data below shows the highest occupancy rates for all accommodation providers in Torbay are during the peak summer months, reaching 87% in August 2013-15 (for all serviced accommodation); 92% in August 2013 and 90% in August 2014 (for self-catering accommodation). Lowest occupancy rates are also typical for all accommodation providers and reflective of lower demand during out of season months e.g. January 2014, January 2015.

¹⁷ South West Research Tourism Company



The chart below contrasts the uplift of occupancy for serviced accommodation over three consecutive years.



EMERGING TRENDS

TDA's industry research shows there are emerging trends which are areas of opportunity for the English Riviera to increase the number of visitors, attract new visitors and increase visitor spend. These key findings are summarised below and have been used to develop the Priorities and Action Plan.

“England’s tourism industry must deliver as much as it promises in the marketing – assuring visitors that they will enjoy great experiences in great destinations, with a warm welcome, world-class customer service and high accommodation standards whatever the budget” (VisitEngland).

Short Breaks

The trend of UK short breaks is growing, with 1-3 nights becoming more popular. April, May, September and October are key months for taking short breaks, seeing a 17% increase (2007-2012).¹⁸

Short breaks are often taken over weekends and can be last minute bookings, which are key characteristics of 25-34 year olds, the ‘pre-family/DINKS’ market (dual income, no kids). Trips research and bookings are mainly made online with trip motivators including escapism, relaxation and wellness activities. Families with pre-school aged children are also likely to visit out of the main summer holiday peak months, particularly May, June and September. This market is more likely to become repeat visitors, visiting with grandparents and choosing locations which are accessible and easy to get to.

Opportunity for the English Riviera:

The rise in short breaks presents an opportunity for the English Riviera, which is supported by industry with 75%¹⁹ of tourism businesses seeing this is an emerging trend. Consumer promotions should focus on the resort’s coastal location, the range of what there is to see, do and experience whilst on a short break all year round, to avoid being overlooked by other destinations. The English Riviera also has the opportunity to further promote how accessible it is to attract new visitors; with the improved South Devon Highway and access to the M5 and Exeter airport, it is easier than ever before to get here. This approach will also help to overcome perceived barriers from non/lapsed visitors as seen in the 2016 visitor surveys.

Staycations

Staycations, from short breaks to long stays, are growing in popularity. With the UK exiting Europe, it’s logical for this trend to increase as the cost of holidays abroad become more expensive. Furthermore, as the weaker pound makes the UK a cheaper destination, we can also expect to see an increase in international visitors. The recent Tourism Alliance’s survey also shows Brexit has prompted an increase in both inbound and domestic visits, with 21% of UK businesses seeing an increase in bookings since the referendum on 23rd June²⁰.

Opportunity for the English Riviera:

68% of tourism businesses saw ‘staycations’ as a growing trend for tourism in the 2016 English Riviera Industry Survey, supporting this opportunity to attract new visitors. Although there is still some uncertainty surrounding the economy as the UK leaves Europe, another opportunity for the English Riviera is to provide business support to help overcome industry concerns, maximise business growth opportunities throughout the year to attract new Domestic and International visitors. Encouragingly,

¹⁸ National Coastal Tourism Academy – Understanding Seasonality in Coastal Destinations

¹⁹ 2016 English Riviera Industry Survey

²⁰ National Coastal Tourism Academy

Torbay businesses *are* optimistic for the future, 71% are confident for the next five years and the majority (61%)²¹ also having development plans, including refurbishments and improving their quality of offer.

Wellness Tourism

Wellness tourism is a growing national trend and area of opportunity for seaside destinations²². In the National Coastal Tourism Academy Destination Feel Good report, the UK market is calculated to be worth in excess of £877m and is forecast to reach £1bn by 2018. Wellness activities can include any 'health-enhancing' activity, (not just spa and beauty treatments as has been in the past), such as healthy eating, fitness, outdoor activities, adventure sports, experiencing 'something new', taking 'time out' and personal or spiritual growth.

According to the NCTA report, 1 in 5 people in the UK go on a 'wellness' trip at least once a year, but that only generates 8% of all overnight coastal trips. Wellness visitors are also more likely to be AB's and look to stay in 4-5 star accommodation types.

The under 35's in particular are more likely to take a 'wellness trip', given their flexibility of when they can visit:

- 66% say health and wellness is a primary motivator for taking a trip.
- Trips tend to be short, and often multiple breaks of choice, rather than a main holiday.
- 38% of wellness trips are taken in May and June, 35% September to November
- The South West is the top UK coastal destination of choice for wellness breaks²³.

Opportunity for the English Riviera:

This new trend therefore presents and an area of opportunity for the English Riviera to attract new visitors throughout the year and by utilising the resort's natural assets, specifically UNESCO Geopark, its accessible location and quality accommodation mix in targeted promotions and packages; the English Riviera can position itself as the South West's wellness tourism destination of choice.

Culture

Cultural tourism presents an opportunity for the English Riviera, building upon its existing assets, including Agatha Christie, UNESCO Geopark and Torre Abbey; as well as local quality food/drink and big events such as The Tale (2017). By creating a more distinctive and sustainable year-round offer the English Riviera can aim to attract new domestic and international cultural visitors (Cultural Tourist, Torbay Culture Strategy Development). This trend also aligns with the Torbay Cultural Strategy 2014-2024, utilising cultural assets, local festivals/events and creative talent, further supporting the development of the destination and the visitor economy.

51% of tourism businesses in the 2016 Industry Survey said they saw festival/events as a key tourism trend, supporting this development. By working in partnership with industry to develop compelling messages and packages to attract cultural tourists, the English Riviera can develop a sustainable and stronger product to attract new visitors throughout the year. This approach will also benefit local residents, improving awareness of the cultural offer. Over time this will help to establish a cultural destination and the reason for visitors coming here. The aspirations of the Discover England Fund project, England's Seafood Coast also complements this approach, aiming to position the English Riviera as an international seafood destination, utilising the resort's quality seafood offer and visitor interest in quality food and drink, reaching international new markets of the USA, German speaking markets, Netherlands and Belgium and Scandinavia.

²¹ 2016 English Riviera Industry Survey

²² National Coastal Tourism Academy – Understanding Seasonality in Coastal Destinations

²³ National Coastal Tourism Academy – Destination Feel Good

Film and Television

The English Riviera has the opportunity to explore new ways of increasing visitor numbers and spend through innovative marketing and maximising the opportunities from TV/film production.

The South West is being used more and more for TV/film and Torbay's infrastructure, natural and cultural assets lend themselves well to becoming a filming destination of choice. Torbay can build upon the revenue opportunities and also strengthen relationships with organisations such as Creative England, who look for filming locations (and who also fund filming projects). The English Riviera can also maximise the promotional opportunities from programmes filmed in/close to the area to attract new visitors, such as recently filmed South West Coast Path series, The Coroner and Rosamund Pilcher (specifically attracting German speaking visitors).

STRENGTHS, ISSUES AND OPPORTUNITIES

The following strengths, issues and opportunities are the basis on which the Destination Management Plan has been developed and stem from the 2016 Visitor and Industry consultation and research.

This Plan sets the framework to bring together these strengths, issues, opportunities, and sets the priorities to develop the English Riviera's aspirations as the preferred South West coastal tourist destination.

STRENGTHS

- Strong UK market: 97% of visitors are UK domestic, $\frac{3}{4}$ are from outside the South West region, with large amounts of visitors coming from the M1, M6 corridors, central and north areas.
- Current visitors are happy and like what they experience - high resort recommendation score, +70%, (significant increase from +42% in 2012-13).
- 79% of visitors are staying overnight.
- Popular location for taking a leisure trip/holiday, (89% of visitors).
- High proportion of affluent ABC1s visitors (54%) and in FT employment (50%).
- Exceptional high return of repeat and loyal visitors (87%).
- The majority of staying visitors are without children and in adult only groups (74%)
- Strong family market, (predominately during school holidays), seeing an increase of groups with children and increase in group size from 2.58 to 2.64 people.
- Accessible location - highest proportion of visitors travelling by car (79%)
- Visitors feel well informed, 86% said information was easy/very easy to find during their visit.
- Strong 'traditional seaside experience', 62% of visitors as the main reason for visiting.
- High visitor satisfaction for 'resort enjoyment' (4.72 out of 5.00)
- A good range of 'things to do' with good satisfaction scores.
- Successful new developments, (e.g. Abbey Sands). The restaurants in this development are often full highlighting the fact that if a quality product is developed, people are willing to use them and spend the money.
- Strong industry confidence: 71% of businesses are confident/fairly confident for the future of their business and 61% are planning to develop and grow their business in the next 5 years.

- Strong desire for partnership and joined-up working from the Industry, for sharing of information/ events, promoting Torbay and improving the quality of offer.
- Businesses are engaging digitally.

ISSUES

- Torbay has an ageing visitor profile: 60% of all visitors are aged 55+ (31% are aged 65+)
- Low rate of first time visitors.
- Extreme seasonality, predominately during the school holidays.
- Low rate in overseas visitors.
- The average length of stay has decreased from 5.40 nights to 4.76 nights.
- The car parking offer is seen as the biggest issue, (with lowest visitor satisfaction scores: value for money 3.32, quality 3.77 and ease 3.74).
- The physical environment of the high street is seen as run down - empty retail shops and dirty streets.
- Increase presence of antisocial behavior and homeless people on the streets/open public areas.
- The proportion of business trips is declining.
- Lapsed/ non visitors do not think they can find a quality offer in Torbay, (specifically food and drink).
- Torbay is seen as a value for money destination
- No new destination related issues deterring visitors, but existing issues need to be addressed.
- Half of tourism businesses experience issues as a result of Torbay's seasonality.
- Low industry confidence in visitor demand, increased competition, the economy (Brexit), recruitment/retention of staff.
- Short supply of high-end accommodation. If Torbay is to attract a higher spending visitor, they are likely to demand better quality/ 5 star accommodation.
- Whilst there are cultural assets, there needs to be a better link between culture and tourism and how this offer is promoted to attract new visitors.
- The English Riviera is a strong brand by current visitors, (evidenced by the high return rate of repeat visitors). However, the brand can be confusing, as the area is also known as Torbay with the towns Torquay, Paignton and Brixham.

- Current visitors are on a budget and are using OTAs more to find the best deals.
- Working in the tourism industry is not perceived as a career option and has an impact on staff recruitment and retention.
- Torbay is seen as too far to travel by lapsed/non visitors.
- There are perceived delays in the development of new development projects. E.g. Torwood Street, Oldway Mansion, Pavilion.
- 1/3 of businesses feel training isn't relevant to their business on a range of key topics and 1/3 don't provide any training at all.
- April to September is the core trading period for businesses.

OPPORTUNITIES

- Promote the English Riviera as a year round destination, extending the season
- Maximise visitor's interest in the local food/drink and the outdoors - making the most of Torbay's natural assets.
- Agatha Christie provides a useful cultural offer and a marketing
- Increased UNESCO Geopark awareness with 40% of visitors wanting to find out more.
- The majority of staying visitors are without children and in adult only groups, presenting the opportunity to further develop this market to increase the shoulder season and occupancy.
- Mix of accommodation and large stock available - develop the quality offer and fill bed spaces out of peak summer months.
- Low rate of International visitors – new product development may support growth in these markets.
- Day visitors staying in other areas of Devon/South West are travelling up to 1 hour to Torbay whilst on their trips (2 hours in some cases).
- Torbay's car parking offer can be used to attract shoppers and day visitors.
- The resort can become a touring base for Devon - given the number of bed spaces and accommodation mix available.
- A higher percentage of non-visitors are looking for history, heritage and culture for a holiday and which they don't think they can find here.
- Increase use of digital by visitors to research, book and review their trips.
- New developments (E.g. Abbey Sands attracting leading restaurants) provide an

opportunity to attract similar developments to Torbay.

- 8% VFR market – this seems low, but may be the second reason for visiting.
- Increase in shorter stays –maximise the visitor spend in this market trend (Brexit/ Staycations).
- Maximise current visitor’s high recommendation scores.
- Accessibility - The new South Devon Highway has improved accessibility to the area; it brings Exeter/Bristol Airport closer in terms of travel times, potentially opening up new markets. This also brings the UK and International markets closer to Torbay and attracting visitors beyond the M25.
- High likelihood of visiting rate from lapsed and non visitors (69%).
- Non-visitors were typically younger than current/lapsed visitors.
- Scope to increase the family market who are on a budget - larger group size, length of stay, repeat visits through the generations.
- Accommodation providers can help to promote events, what’s on/things to do - given they are in direct contact with visitors before, during and after their visits.
- Opportunity to review the UK and International conference and business market.
- Successful VisitEngland Discover England Fund project, (England’s Seafood Coast) will create a strong quality food and drink offer to attract new International visitors.
- The new Tourism BID Company will provide a clear way forward for destination marketing.
- Businesses are engaging digitally, there are opportunities to help businesses to use these platforms more effectively.
- A third of businesses said training was not relevant to their business and a third do not provide any training at all - opportunity for skills, training and business support.

PRIORITIES

There are six Priority areas for the Destination Management Plan:

- **Priority 1:** Partnership Working - *what do we need to do to deliver the Destination Management Plan?*
- **Priority 2:** Product Development - *what quality products do we need to develop to meet the needs of new and existing visitors?*
- **Priority 3:** Market Development and Communication - *where are the new and emerging markets which present the best opportunity and how do we best communicate to existing and new visitors through destination marketing?*
- **Priority 4:** Developing the Destination - *what needs to be done to improve the physical destination?*
- **Priority 5:** Visitor Experience - *what do we need to do to make sure the visitor receives the best welcome and quality experience?*
- **Priority 6:** Skills and Business Development - *what do we need to do to ensure we have the right key skills, including online digital, to meet customer needs and expectations?*

Through focused and managed actions in relation to the Priorities, this DMP will aim to strengthen the English Riviera visitor economy to achieve its Objectives and the following outcomes:

- Increased visitor numbers and spend
- Extending the season beyond the school holiday periods
- Attracting new visitors
- Attracting investment and reinvestment
- Ensuring sustainable delivery of marketing activity for the destination
- Improved quality of accommodation offer
- Improved infrastructure, parking and retail offer
- Improved hotel occupancy throughout the year
- Improved visitor satisfaction results and recommendation rates across all areas
- Increased number of businesses taking up training opportunities
- Better connection with education providers and take up of apprenticeships
- Improving the perception of tourism of a career choice, retaining skills and local talent

ACTION PLAN

This section builds upon the presented Priorities and sets out a series of key actions to take the Destination Management Plan forward. It should be noted that whilst these actions can stand alone, there is likely to be some overlap (i.e. developing the destination will also have an impact upon communication).

Priority 1: Partnership Working

1. Creation of the Destination Management Group and setting the Terms of Reference, to manage the Plan and develop the English Riviera's visitor economy.
2. Creation of the Sub Reference Group to support the DMG and development of the Plan.

Priority 2: Product Development

3. Develop an all-year round seasonal product, extending the season to attract new Domestic and International visitors and overcome extreme seasonality in peak summer months. Supporting marketing and communications, promoting the English Riviera as an all year round destination, extending the season and attracting new visitors all year round.
4. Define Torbay's cultural offer to target and attract new visitors; develop new itineraries making the most of cultural assets Agatha Christie and UNSECO Geopark, and further explore opportunities in this new market; further supporting the all year round offer and attracting international visitors.
5. Develop a range of packages and experiences to exploit new opportunities and satisfy the needs of new visitor markets; Develop compelling packages and targeted marketing messages to attract new Domestic and International visitors, as well as re-engaging with lapsed/non visitors; including quality food and drink, history heritage and culture, natural assets and outdoor experiences.

Priority 3: Market Development and Communication

6. Develop an all-year round seasonal offer, extending the season, marketing the English Riviera as an all-year round destination, using Torbay's natural assets throughout the year to define and promote the offer. This should include evolving the current calendar of events/activities, making the most of big events and using key seasonal messages to attract new UK and International visitors.
7. Ensure regular market intelligence and evaluation takes place to inform effective market development - keeping the English Riviera up to date with visitor trends, emerging markets and further developing the offer.
8. Scope new opportunities and development into new UK and International visitor markets. Identifying the new trends and how to maximise the opportunities to extend the season and increase new visitors. To include increasing short breaks and the rise in 'staycations', international visitors, engaging with non/lapsed visitors, business/conference tourism and TV/film opportunities.
9. Develop the UNESCO Geopark offer to maximise visitor interest and increase new International and Domestic visitor markets. The offer should be accessible online, reflecting visitor trends, defining how both visitors and residents can benefit; further supporting product development and the English Riviera's all year round offer.
10. Build upon Torbay's digital presence - improving the quality and accessibility of visitor information, and also increasing direct online bookings with businesses through improved e-commerce websites; Working with industry for a joined up approach to cross-promote and aligning with national

VisitEngland VisitBritain campaigns which are digitally focussed, including the creation and sharing of quality content, guides, itineraries and images.

Priority 4: Developing the Destination

11. Maintain the strategic partnership focus for the development of the English Riviera's visitor economy to ensure the Plan's Objectives are achieved.
12. Align with Torbay Council's Corporate Plan, to ensure the English Riviera remains an attractive and safe place to live, visit and work. This includes ensuring services delivery, infrastructure and public open spaces accessed by visitors are maintained all-year round to support the destination's product development; as well as the review of the TOR2 Joint Venture Company arrangements and provision of public toilets (for example), to meet the needs of visitors all year round.
13. Review Torbay's retail and parking offer, as well as gateway and signage, to understand how it can be used to improve the quality of the visitor experience and overall welcome to the English Riviera; Alignment to Torbay Masterplans implementation timeframes and communication plans, further supporting product development and the quality of the visitor experience, specifically to overcome negative resort perceptions.
14. Review of Torbay Council's policy for accommodation change of use; to better understand the impact on the visitor economy, the provision of support information for businesses and the future development of good quality accommodation, to attract new visitors and meet their needs.
15. Support the re-investment and attract new high quality investments, to further develop the English Riviera's offer and to attract new UK and International visitors. Specifically, making better use of Torbay Council capital infrastructure assets, including Torre Abbey, Oldway Mansion and Broadsands Beach, improving the quality of offer, whilst also generating revenue for the visitor economy.
16. Review Torbay's digital connectivity offer - ensuring the English Riviera offers exceptional, accessible Wi-Fi across the resort and in public spaces, improving the quality of visitor welcome and experience for both residents and visitors. This further supports product development and increasing the 'visiting friends and relatives market'. We know visitors are online during their stay to access information, book restaurants/things to do, as well as leaving online reviews. This offer therefore recognises and supports this trend, whilst improving the visitor experience.

Priority 5: Visitor Experience

17. Continue to develop customer care across the resort, giving the best welcome to all visitors and maintaining high satisfaction; Providing a quality offer and visitor experience consistently all year round, attracting and maintaining visitors to a quality destination.
18. Ensure modern, well-informed parking services are provided for all visitors, as detailed in Torbay Council's Parking Strategy 2016-2021; including the adoption of clear pricing options and seasonal campaigns, increasing revenue. Further supporting the all year-round product development, providing quality, affordable and accessible parking services will meet visitor expectations and overcome negative resort experiences and improve satisfaction rates.
19. Ensure industry and local residents are well informed to provide up to date information to visitors/relatives on resort - Improving the communication and promotions of resort events/services, through a joined up approach will increase attendance, visitor spend and local awareness, improving the overall visitor experience.

20. Identify areas of opportunities to increase visitor satisfaction scores into other resort services. Overall resort recommendation is high for example from current visitors; by developing weaker areas of visitor satisfaction, such as car parking facilities, public toilets and beach services it will positively impact on the visitor experience.
21. Maximise the opportunities through awards and accreditations to raise the profile of the English Riviera as a quality destination to new markets. Promote and support businesses to enter awards and gain accreditations/recognition, including TripAdvisor, VisitEngland and Purple Flag.

Priority 6: Skills and Business Development

22. Develop the evidence base; conduct regular industry intelligence to understand the needs of industry, informing business and skills development. Ensure market-led business support is taking place, further supporting developing the destination and the visitor experience.
23. Support industry by changing perceptions for tourism as an attractive career path and retain local talent – by developing the destination and the all year round offer, it will support the industry with issues experienced by seasonality.
24. Develop an accessible and affordable programme of business support; encouraging tourism businesses throughout the resort to embrace the all year round offer. Business support to include key areas such as addressing key issues and barriers to growth, developing digital skills, increasing revenue and maximising opportunities.
25. Identify future funding opportunities for business skills development, supporting the development of the visitor economy and maximising the funding opportunities. This also supports product development and developing the destination.
26. Encourage adoption of apprenticeship schemes throughout the industry, helping to overcome the barriers of recruitment and retention of staff, an issue often seen by tourism businesses due to Torbay's seasonality.

Action Plan Table

The Destination Management Group will deliver each of the six priorities through a series of key actions. The lead organisation for each action is identified, who will work to develop and implement a focused and measurable action plan. The actions therefore represent the top ambitions for the developing the destination and are the fundamentals to drive the DMG.

Key:

- DMG – Destination Management Group
- TC - Torbay Council
- ERBIDCo - English Riviera BID Company
- TDA – Torbay Development Agency
- TCB - Torbay Culture Board
- ERGGO - English Riviera Global Geopark Organisation

Priority	Priority Headline	Key Actions	Lead Organisation	When
1.	Partnership Working – what do we need to do to deliver the Destination Management Plan?	<ol style="list-style-type: none"> 1. Creation of the Destination Management Group and set the Terms of Reference. 2. Creation of the Sub Reference Group 	<p>TC</p> <p>DMG</p>	
2.	Product Development – what quality products do we need to develop to meet the needs of new and existing visitors?	<ol style="list-style-type: none"> 3. Develop an all-year round seasonal product to attract new visitors and overcome extreme seasonality in peak summer months. 4. Define the cultural offer and develop new itineraries. 5. Develop a range of packages and experiences to exploit new opportunities and satisfy the needs of new visitor markets. 	<p>DMG</p> <p>TCB</p> <p>ERBIDCo</p>	

<p>3. Market Development and Communication - where are the new and emerging markets which present the best opportunity and how do we best communicate to existing and new visitors through destination marketing?</p>	<p>6. Develop an all-year round seasonal offer marketing the English Riviera as an all-year round destination, including evolving the current calendar of events/activities to support offer.</p>	<p>ERBIDCo</p>
	<p>7. Ensure regular market intelligence and evaluation takes place to inform effective market development.</p>	<p>ERBIDCo</p>
	<p>8. Scope new opportunities and development into new UK and International visitor markets.</p>	<p>ERBIDCo</p>
	<p>9. Develop the UNESCO Geopark offer to maximise visitor interest and increase visitors.</p>	<p>ERGGO</p>
	<p>10. Build upon Torbay's digital presence - improving the quality, accessibility of information, and increase direct online bookings.</p>	<p>ERBIDCo</p>

<p>4. Developing the Destination – what needs to be done to improving the physical destination?</p>	<p>11. Maintain the strategic focus for development of the visitor economy.</p>	DMG
	<p>12. Align with Torbay Council's Corporate Plan, to ensure the English Riviera remains an attractive and safe place to live, visit and work.</p>	TC
	<p>13. Review Torbay's retail and parking offer, as well as gateway and signage, to understand how it can be used to improve the visitor experience and overall welcome.</p>	TDA (retail) TC (parking)
	<p>14. Review Torbay Council's accommodation change of use policy to support the development of good quality accommodation.</p>	TC
	<p>15. Support re-investment, attract new high quality investments and make better use of Torbay Council capital infrastructure assets for development and revenue opportunities.</p>	TC
	<p>16. Review Torbay's digital connectivity offer to provide quality Wi-Fi across the resort and public spaces.</p>	TDA

5.	Visitor Experience – what do we need to do to make sure the visitor receives the best welcome and quality experience?	17. Continue to develop customer care, giving the best welcome to all visitors and maintaining high customer satisfaction.	DMG
		18. Ensure modern, well-informed parking services are provided for visitors, as detailed in Torbay Council's Parking Strategy.	TC
		19. Ensure industry and local residents are well informed to provide up to date information to visitors.	ERBIDCo
		20. Identify areas of opportunities to improve visitor satisfaction scores into other resort services.	DMG
		21. Maximise the opportunities through awards and accreditations to raise the profile of the destination.	ERBIDCo

6. Skills and Business Development – <i>what do we need to do to ensure we have the right key skills, including online digital, to meet customer needs and expectations?</i>	22. Conduct regular industry intelligence to understand the needs of industry, to inform business and skills development.	TDA
	23. Support industry by changing perceptions for tourism and as an attractive career path and retain local talent.	TDA
	24. Develop an accessible and affordable programme of business support.	TDA
	25. Identify future funding opportunities for business skills development.	DMG
	26. Encourage adoption of apprenticeship schemes throughout the industry	DMG



English Riviera
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