

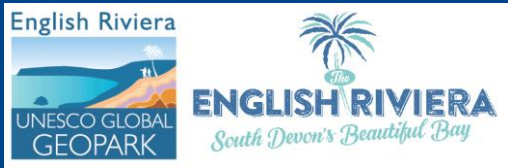


2017-2021

# English Riviera Destination Management Plan 2017-2021

## Evidence Base

Pride in Place





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# INDUSTRY SURVEY 2016

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A comprehensive online tourism industry survey took place for three weeks in July 2016 by The South West Research Company Ltd on behalf of TDA. The aims and objectives of the 2016 survey were:

- To provide up-to-date information on current marketing methods used by businesses.
- To establish communication methods with visitors before, during and after their trips.
- To ascertain the current levels of training provision.
- To identify any issues and challenges related to the seasonal nature of tourism.
- To understand what businesses feel are the key priorities and emerging trends.

The survey was distributed to 984 tourism businesses, using ERTC contacts database, as well being promoted through the TDA Business Newsletter, local press release, Torbay Business Forum, Brixham Chamber of Commerce and across social media.

A total of 75 useable responses were generated, representing a 7.6% response rate.

A detailed analysis report produced by the South West Research Company is also available; the following are key summary points from the survey.

## Key Findings

The results of the 2016 industry survey show Tourism in the English Riviera is very positive and businesses are generally using a mix of marketing, they recognise the importance of being digitally visible, value communication and providing information to visitors.

### Industry Profile:

- 73% of respondents were accommodation providers
- 71% of businesses are based in Torquay
- 57% of respondents were established business and more than 6 years old
- 43% are independent businesses

### Marketing and use of Digital:

72% of business said they used targeted marketing to attract a certain type of visitor:

- 83% to attract UK visitors
- 78% to attract European visitors
- 65% to attract International visitors
- 65% to attract over 65's groups

The majority of businesses, 97% said they had a website and 76% said they were using social media.

The survey asked businesses to select the most and least successful marketing routes for generating income. The results showed the most successful methods are online with OTAs, own websites and review sites generating the most income.

### Communication and Information:

- 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.
- 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 after the visit.

The majority of Torbay businesses recognise the importance of customer reviews and are engaging online:

- 79% of businesses read customer reviews on TripAdvisor.
- 63% respond to positive reviews.
- 67% respond to negative reviews.
- A third of businesses don't have a TripAdvisor account or don't look at reviews.

### Training:

The majority of Torbay businesses provide training in-house across a variety of key (prompted) areas:

- 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

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. This presents clear opportunities for improving skills, delivering training, increasing awareness and delivering business support for tourism businesses.

### Trading, Challenges, Trends and Business Confidence:

- The core months of trading for businesses are April – September.
- 85% of businesses were 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, supporting the development of extending the season.

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
- Recruiting seasonal staff
- Staff retention in off peak

The top emerging trends from businesses were:

- Short stays
- All-year round destination
- Domestic staycations
- Events/festivals

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 also stated they have plans to develop their business in the next five years, including plans for refurbishments, improving services and increased/ targeted marketing.

# VISITOR SURVEY 2016

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Please also refer to the separate survey questions document and analysis report produced by the South West Research Company.

A comprehensive 2016 face to face and online visitor survey was conducted at key times between March and July by The South West Research Company Ltd on behalf of TDA.

A total of 2,337 responses were generated from the visitor surveys over a phased approach to maximise engagement in the time period available:

- 600 adults were interviewed face to face on popular street locations throughout Torbay, during Easter fortnight and also for a week in May (during term time).
- 1,737 online survey responses were generated in July.

The questions were grouped into key areas:

- Visitor profile
- Characteristics of visits
- Information sourcing
- Destinations visited, activities undertaken
- Visitor satisfaction
- Lapsed visitors
- Non visitors

A detailed analysis report produced by the South West Research Company is also available; the following are key summary points from the survey.

## Key Findings Summary Analysis

The results of the 2016 visitor survey confirm that The English Riviera continues to be a popular holiday destination.

It has a strong and loyal UK market attracting 97% of visitors from the UK and has an extremely high repeat visitor rate of 87%.

## VISITOR PROFILE

### Visitor Age

The survey clearly shows Torbay's ageing visitor profile with the majority of current visitors 60% aged over 55.

### Visitor Origin

- 75% of all Torbay visitors were from outside the South West region, (an increase from 66% in 2012/13), illustrating Torbay's good accessibility and popularity as a top UK seaside holiday destination.
- 23% of visitors lived within the South West region, a popular destination. This was 31% during the 2012/13 survey, indicating competition from other neighbouring destinations.

- Just 3% of all 2016 visitors surveyed were from overseas (the same during the 2012/13 survey); including 1% of all visitors who were from Germany. This shows there is room for growth in this market with targeted marketing campaigns and developing the tourism product.

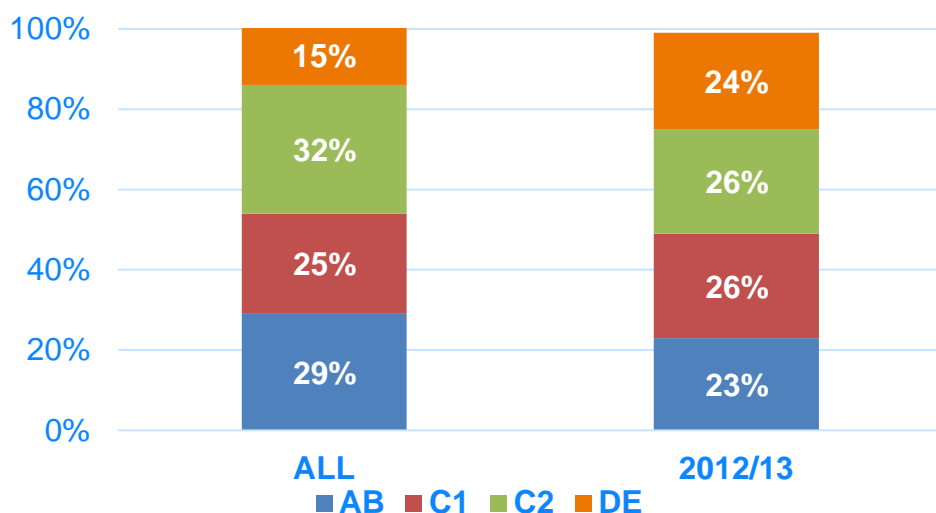
Hot spots and common areas of visitor origin are The Midlands, North East, North West and main M1/M6/M5 motorway corridors. When looking at the origin of lapsed and non visitors the locations hot spots are very similar.

### Socio-Economic Grade

Encouragingly for future growth, Torbay’s visitors continue to increase from ABC1 classification, which shows more visitors are working with disposable income to spend on their holidays.

- 54% of visitors were classified as ABC1’s (a 5% increase from 49% in the 2012/13 survey). This includes 29% as AB’s and 25% as C1’s.
- Half of all Torbay’s visitors were in full time employment, (increasing from 43% during the 2012/13 survey).

**Socio Economic Grade**



### **CHARACTERISTICS OF VISITS**

- 89% of all visitors were on a leisure/holiday related trip showing the English Riviera’s strong position in the Domestic holiday market (this was similar in 2012-13).
- 87% of visitors were on a repeat visit to the resort, which has increased by 2% from 85% during the 2012/13 survey, showing the English Riviera’s loyal visitor base who enjoy coming back.
- Half of all staying visitors were staying overnight in Torquay, the most popular of the three towns.
- The average length of stay was 4.76 nights, (compared with 5.40 nights during the 2012/13 survey), indicating an increase in trend for short breaks.
- Day visitors staying in other areas of Devon and the South West are travelling up to one hour to Torbay whilst on their trips (two hours in some cases). This is a good indication of the English Riviera’s popularity and accessibility, presenting further opportunity to attract more day/staying visitors to the area.



- 79% of visitors had arrived by car/van (increase from 68% during the 2012/13 survey), evidencing road is by far the most popular form of transport.
- Just 8% of visitors had arrived in the resort by train (compared with 7% of visitors during the 2012/13 survey). This shows Torbay's good accessibility by road, but does suggest improvements can be made to rail services for both staying and day visitors.

#### First time and repeat visitors

- The English Riviera has an incredibly high return visitor rate of 87%. Whilst this is a great achievement and should be acknowledged, it is an issue to consider when coupled together with Torbay's older age of visitor (60% aged over 55).
- 14% of visitors were on their first visit to The English Riviera. A priority for Torbay is therefore to increase the number of new visitors to the resort.

### **INFORMATION SOURCING**

On deciding where to go on holiday and planning a trip, visitors more than ever are using digital to research and book their trips. This can include:

- Searching on Google with key search words
- Referring to online review sites, such as TripAdvisor to research where to visit
- Engaging on social media – social influence and 'FOMO' ('fear of missing out')

The 2016 visitor surveys therefore included questions to gain insight into how visitors sourced information and booked their trips. The results show the top information sources are from a previous visit (57%) and via the internet (37%).

- 57% of staying visitors who used the internet to make a booking, had used their accommodation providers' website to do so (this was noticeably higher at 75% in 2012/13). This decrease could relate to returning visitors who do not need to access the site again.
- Just 4% of all visitors said they visited a Tourist Information Centre, indicating a drop in more traditional information sources, as they are using online methods more.
- A further 32% had used an Online Travel Agent to book their accommodation (which has doubled since the last survey, (previously 16% in 2012/13).
- 18% had used other websites which included The Sun, Blue Chip Holidays, as well as other OTA-associated platforms.

This shows there has been an 18% decrease of visitors booking directly with their Torbay accommodation online. The increase of bookings with Online Travel Agents/third parties could indicate a possible trend of visitors looking for the best price, discounts and last minute deals which are commonly available such as Booking.com; rather than booking directly with their hotel/B&B. This is a common and growing trend in current consumer behaviours who are looking for the latest offer and getting the most from their budget. It also presents a lost opportunity for Torbay businesses and is an area which should be looked at to maximise income opportunities and direct online bookings.

Using the internet to decide where to go on holiday remains consistently high. What is interesting is how and when visitors are using the internet to research where to go, what to do, booking and also posting reviews – before, during or after their trip. English Riviera businesses therefore need to be effective in using digital platforms and also aware of how they can get the most out of them to secure bookings, increase revenue, improve customer service and reach new customers.

- Of those internet users sourcing information, the majority at 81% had also used the internet to also book their accommodation/activity on-line. This again, shows the growing trend preference of visitors using the convenience of the internet to research and book their trips.
- It also shows the remaining 19% are being lost and potentially booking elsewhere, presenting an opportunity for future digital improvements for booking and capturing visitors online.

#### Whilst on holiday (all visitors)

- 60% of all visitors look for information on 'things to do' (increase from 46% 2012/13)
- 52% 'where to go', (decrease from 39% 2012/13)
- 50% attractions (doubled from 25% 2012/13)
- 43% eating out (24% in 2012/13)

These results show visitors are active with traditional holiday activities whilst they're here. Events however, scored just 37%, which indicates these aren't necessarily the reason why visitors are coming to the English Riviera, but more of an additional add-on activity to their holiday plans.

#### Obtaining information

When asked how easy they found it to obtain the information they needed during their visit, 86% of all visitors said it had been 'easy' (48%) or 'very easy' (38%) to do so. Indicating visitors can access what they need and there are no issues with finding information whilst on holiday in the resort.

As with sourcing information before visiting, 37% of visiting relied on information gained from a previous visit. This was the case for both survey methods and for the Easter face to face interviews. Those respondents interviewed in the resort during May were most likely to have obtained their information from their accommodation reception (33%).

A third, 29%, of staying visitors had used the internet to source their information about The English Riviera during their actual visit, which shows the growing use of mobile digital - this can include information websites, social media and Google searches etc.

For internet users (staying visitors), the survey also asked which websites were used for sourcing information to gain further insight into visitor's behaviour, points of interest and influence.

- 42% used the official [www.englishriviera.co.uk](http://www.englishriviera.co.uk) website
- 41% used online review sites such as TripAdvisor
- 25% are using the providers own website
- 18% are using social media
- 12% are using the official English Riviera App

## Social Media and Online Reviews

With the growing popularity and use of social media, visitors were also asked in the 2016 surveys if they ever 'checked-in', uploaded photos and posted reviews during their visit or when they returned home. This was to help understand how mobile digital, instant sharing and the 'fear of missing out' (FOMO) trend is increasing on social networks. Importantly, it will help to share with businesses how and why they should effectively manage their digital profile.

- 61% of all visitors said they uploaded photos to social media (39% during their visit, 22% when they returned home).
- 55%, 'Checked-in' to businesses/attractions (44% during their visit or 11% when they returned home).
- 51% of visitors said they posted online reviews (20% during their visit, 31% when they returned home).

This is very interesting for understanding visitor behaviour and influences using digital technology. The majority of visitors are using social media 'on the go', sharing and posting reviews instantly with friends/family whilst on holiday; (and as well as accessing information and booking).

A recent example to highlight the impact of influence and customer service on social media is when Duncan James visited a Torquay restaurant. He felt he wasn't getting good customer service, he tweeted his thoughts and a neighbouring restaurant secured his booking (April 2016, exposure to 340,000 followers): <http://www.torquayheraldexpress.co.uk/celeb-singer-duncan-james-twitter-rant-snob/story-29102852-detail/story.html>

## **DESTINATIONS VISITED AND ACTIVITIES UNDERTAKEN**

- 32% of visitors were aware that the English Riviera has UNESCO Global Geopark status (increasing from 19% in 2012/13).
- 40% of visitors indicated that they would be interested in learning more about what a UNESCO Global Geopark is (43% 2012/13).

These numbers clearly show UNESCO Global Geopark awareness has significantly increased since the last survey in 2012/13 and interest to find out more has also remained consistent. This indicates however, that people still don't know what the Geopark is and presents an opportunity to engage and promote.

The UNESCO Global Geopark is a priority natural asset which plays a key part in the English Riviera's cultural offer. It needs to be clearly defined to all visitors, so they can understand how they can benefit and plan their trips. With its international status and reach, the UNESCO Global Geopark has the potential to reach new and untapped markets, attracting more visitors and spend to Torbay.

- Torquay seafront is the most popular area to visit, seeing the largest proportion of visitors, 79% 'had or intended to visit' it (a small reduction from 83% in 2012/13).
- Torquay harbour was the second most popular 71% (75% in 2012/13) with also Paignton Seafront a close third 67% (61% 2012/13).

This confirms Torbay's 'seaside attraction' and Torbay's biggest natural asset and why people are visiting the area.

- The top five types of attractions/places of interest visitors had visited/were intending to visit were;
  - Shops 75% (81% in 2012/13)
  - Cafes 70% (78% in 2012/13)
  - Harbours 70% (67% in 2012/13)
  - Beaches 63% (48% 2012/13)
  - Restaurants 60% (57% 2012/13)

This clearly shows visitors intentions of what to do whilst on holiday is typical for a seaside resort and numbers are fairly consistent with the last survey period.

At the lower end of the scale are areas of opportunity for Torbay and which can be pulled under a new cultural offer.

- 5% Geopark
- 5% art exhibitions (6% 12/13)
- 8% arts & crafts (7% 12/13)
- 13% museums (n/a)
- 14% historical sites (9% 12/13)
- 14% South West Coast Path (n/a)
- 20% Dartmoor/Countryside (n/a)
- 21% local events (7% 12/13)

The top five activities visitors had/intending to take part in were;

1. Eating and drinking 84% (89% in 2012/13)
2. Shopping and a Short walk of up to 2 miles 72% each (80% and 72% respectively in 2012/13)
3. Spending half a day or more on the beach 45% (increase from 28% 2012/13)
4. Long walk of more than 2 miles 36% (increase from 28% 2012/13).

These figures show a strong interest in local activities and the outdoors, including a noticeable increase in spending time at a beach and long walks; as well as destinations highlighted above such as the South West Coast Path and Dartmoor.

These activities can be used to help attract new visitors and increase awareness of the local quality offer with targeted marketing campaigns such as the Discover England Fund project England's Seafood Coast (food and drink interest) and the South West Coast Path (walking) and Blue Flag beaches etc.

- The most sought after attributes of a destination which visitors look for when choosing where to visit were:
  1. Rest and relaxation (70%)
  2. Quality food and drink (67%)
  3. Traditional seaside experience (62%)
- The least sought after attributes were:
  1. Health and wellbeing activities (15%),
  2. Nightlife and evening Entertainment (16%)
  3. Adventure activities (17%).

The survey then asked visitors what attributes they think can be found in Torbay. Higher proportions of visitors across the board felt that each of the attributes could be found during a visit to The English Riviera which is encouraging:

1. Rest and relaxation (71%)
2. Quality food and drink (69%)
3. A traditional seaside experience (68%)

4. Health and wellbeing activities (26%)
5. Nightlife and evening Entertainment (29%)
6. Adventure activities (27%).

These findings tell us *why* visitors are coming to the English Riviera and that the resort is giving them what they want in a holiday/tip. E.g. rest and relaxation, food and drink, a traditional seaside experience.

The lower responses for adventure, health and wellbeing activities may be a lack of understanding of what these terms means. But it does give an indication of the opportunity to expand into these product areas, experiences and activities to increase visitor numbers – particularly given the large percentage of visitors currently going for long and short walks. The evidence does show visitors interest in the outdoors and natural assets in the area. The English Riviera isn't seen as a place for evening entertainment/night-life which is also unsurprising, given the main visitor characteristic type and what they are looking for in a holiday destination.

## **VISITOR SATISFACTION**

- At 4.72 out of 5.00 visitor satisfaction was highest for their overall enjoyment of their visit to the English Riviera (increase from 4.63 2012/13).
- Opinions were lowest, at 3.32, for the value for money of car parks (from 3.20 in 2012/13).
- Positively, 86%,(24 out of the 28 indicators) explored in terms of visitor satisfaction achieved a high average score above 4.01 out of 5.00.
- Only four indicators were ranked lower than 4.00 out of 5.00 in terms of visitor satisfaction (and increase from three indicators during the 2012/13 survey) which were:
  1. Value for money of nightlife/evening entertainment (3.98)
  2. Quality of service of parking (3.77)
  3. Ease of parking (3.74)
  4. Value for money of parking (3.32)

Clearly the main areas of dissatisfaction are car parking and the resort's evening offer. These can be addressed and packaged in positive, targeted campaigns, defining what the area can offer visitors and to also help manage visitor expectations.

The English Riviera achieved a high Recommendation Score of +70% for respondents' likelihood of recommending the resort as a place to visit to their friends and/or family (+42% 2012/13). This is a massive achievement, which has increased by 28% since the last survey. Visitors love the English Riviera and will actively recommend to others – becoming our promoters, the best form of advertising and which needs to be maintained.

77% of visitors (online survey respondents only) said that they would be very likely to re-visit The English Riviera again in the future and a further 15% would be 'likely'. Giving a likelihood of returning rate of 92%, again this is a big achievement and shows people like it here and they could return, further enhancing Torbay's current repeat visitor rate of 87%.

In addition to these points, a wide range of 'likes' were given by respondents in the survey, all of which contribute to Torbay's cultural offer:

- The scenery/ views
- Atmosphere
- The beach/ sea/ coast



A range of 'dislikes' were also given by visitors, the top issues highlighted include:

- Cost/ availability of car parking
- Run-down buildings
- Empty/ closed up shops
- The weather/ raining



### Accommodation

Visitors rated the quality of service (4.58) and value for money (4.47) of their accommodation very highly.

Whilst the score for the quality of service at their accommodation was rated slightly higher than during the 2012/13 survey (4.53) and was ranked the fourth highest of all the indicators being explored by the survey during 2016, in contrast, the score for value for money was rated slightly lower by respondents than during 2012/13 (4.52).

92% and 88% of respondents respectively rated the quality of service and value for money of their accommodation in the resort as 'good' or 'very good'.



Visitors chose a wide variety of other destinations for their tips, in the South West, throughout the UK, into Europe and further overseas including coastal, countryside and urban locations:

<b>OTHER LOCATIONS - LAPSED VISITORS</b>	
OTHER DEVON	3%
OTHER SW	15%
OTHER UK	48%
OTHER EUROPE	25%
REST OF WORLD	9%
	<b>100%</b>

## Non-Visitors

The 2016 online survey also engaged ‘non-visitors’ (13% of survey respondents), who despite requesting information about the English Riviera from the official English Riviera Tourism Company had never visited the resort. As with lapsed visitors, this is a valuable data sample which helps to shape the Plan to attract new visitors to the English Riviera.

### Key findings include:

- 51% were aged 45-64 years, including 30% who were aged over 55-64 years. Non-visitor respondents were typically younger than current/lapsed visitors.
- 67% of non-visitors were female, a much higher proportion when compared to current/lapsed visitors.

As with lapsed visitors, the survey asked what the most sought after attributes are when choosing a destination:

- Quality food and drink (79%)
- Rest and relaxation (74%)
- Nature and Countryside (64%)
- History, Heritage and Culture (64%)

The survey asked if non-visitors felt they could find these attributes during a visit to The English Riviera, here the proportions also changed slightly:

- Quality food and drink (61%)
- Rest and relaxation (63%)
- Nature and Countryside (55%)
- History, Heritage and Culture (53%)

Crucially, this data shows that non-visitors don’t think they can find what they are looking for in a holiday in the English Riviera. It appears ‘history, heritage and culture’ is more important for non-visitors, which was given as a top attribute for when choosing a destination. This therefore presents a clear opportunity for product development to attract new visitors to the destination.

When asked why, despite requesting information about The English Riviera, they had never actually visited the resort, the same top reasons were given as lapsed visitors:

- 48% said it was because they had chosen to visit another destination instead.
- 43% said it was because of a lack of money/available finances.
- 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%
	<b>100%</b>

- 15% of non-visitors also said there was something specific about The English Riviera which had deterred them from visiting. Noticeable main reasons include:
  - Lack of information and awareness about the destination – comments such as “don’t know much about the area”, “never thought of it as a destination to visit”, “need a good reason why”, “haven’t seen publicity” were given.
  - Change in personal circumstances.
  - Chose another destination – as with lapsed visitors this included a mix of South West, UK, European and International locations (above)
  - Visiting friends and relatives in other destinations.
  
- 69% of non-visitors gave a ‘likelihood of visiting’ the English Riviera in the future rate - meaning Torbay is in a **very strong** position to easily attract new visitors by re-engaging with this market. (40% said they are ‘likely’ to visit, 29% said they are ‘very likely’).

# VISITOR EVIDENCE DATA 2015<sup>1</sup>

TORBAY HEADLINE DATA	
UK trips	1,084,000
Overseas trips	95,600
Total trips	1,179,600
UK nights	4,033,000
Overseas nights	562,800
Total nights	4,595,800
UK spend	£274,410,000
Overseas spend	£36,307,000
Total spend	£310,717,000
Tourism day visits	3,389,000
Tourism day visit spend	£125,323,000
Total business turnover	£584,716,000
GVA	£319,981,000
Total GVA	
Tourism as % of total	
Staying tourist supported employment	
Direct FTE employment	4,402
Indirect & induced FTE employment	2,069
Actual jobs	8,781
% of employment	15%
Day visitor supported employment	
Direct FTE employment	1,451
Indirect & induced FTE employment	559
Actual jobs	2,783

## Trips by purpose

	UK	Overseas	Total
Holiday	858,000	52,100	910,100
Business	145,000	17,900	162,900
Visits to friends and relatives	63,000	18,800	81,800
Other	18,000	1,400	19,400
Study	0	5,400	5,400
<b>Total</b>	<b>1,084,000</b>	<b>95,600</b>	<b>1,179,600</b>
<b>Nights by purpose</b>	UK	Overseas	Total
Holiday	3,482,000	222,700	3,704,700

<sup>1</sup> South West Research Company Visitor Data 2015

Business	338,000	89,200	427,200
Visits to friends and relatives	158,000	123,800	281,800
Other	54,000	28,600	82,600
Study	0	98,500	98,500
<b>Total</b>	<b>4,033,000</b>	<b>562,800</b>	<b>4,595,800</b>
<b>Spend by purpose</b>	<b>UK</b>	<b>Overseas</b>	<b>Total</b>
Holiday	£226,436,000	£15,439,000	£241,875,000
Business	£18,649,000	£7,675,000	£26,324,000
Visits to friends and relatives	£20,493,000	£5,302,000	£25,795,000
Other	£8,833,000	£1,901,000	£10,734,000
Study	£0	£5,990,000	£5,990,000
<b>Total</b>	<b>£274,410,000</b>	<b>£36,307,000</b>	<b>£310,717,000</b>

<b>Tourism Day Visits</b>	
	Trips
Urban visits	1,826,000
Countryside visits	78,000
Coastal visits	1,485,000
<b>Total</b>	<b>3,389,000</b>

<b>Total employment related to tourism spending</b>			
	Staying tourists	Day visitors	Total
	Full time equivalent		
Direct	4,402	1,451	5,853
Indirect	1,481	376	1,857
Induced	588	183	771
<b>Total</b>	<b>6,472</b>	<b>2,010</b>	<b>8,481</b>
	Estimated actual		
Direct	6,422	2,146	8,568
Indirect	1,688	428	2,117
Induced	671	208	879
<b>Total</b>	<b>8,781</b>	<b>2,783</b>	<b>11,564</b>

# VISITOR EVIDENCE COMPARISON

## DATA 2010-2015<sup>2</sup>

### TRIPS AND SPEND

UK Domestic	2010	2015	Change %	Compound Inflation Rate	Change %
Trips	967,000	1,084,000	12		
Nights	3,881,000	4,033,000	4		
Spend	£220,433,000	£274,410,000	24	£ 242,297,386	8

Overseas	2010	2015	Change %	Compound Inflation Rate	Change %
Trips	94,500	95,600	1		
Nights	597,900	562,800	-6		
Spend	£35,941,000	£36,307,000	1	£ 39,505,928.56	-3

Day Visits	2010	2015	Change %	Compound Inflation Rate	Change %
Trips	2,537,000	3,389,000	34		
Spend	£120,873,000	£125,323,000	4	£132,597,000	-7

TOTAL STAYING TRIPS	2010	2015	Change %	Compound Inflation Rate	Change %
Trips	1,061,500	1,179,600	11		
Nights	4,478,900	4,595,800	3		
Spend	£256,374,000	£310,717,000	21	£281,240,833	7

TOTAL ALL VISITORS (Staying & Days)	2010	2015	Change %	Compound Inflation Rate	Change %
Nights	4,478,900	4,595,800			
Spend	£377,247,000	£310,717,000		£414,665,508.27	2

UK STAYING VISITORS	2010	2015	Change %	Compound Inflation Rate	Change %
Average nights per trip	4.01	3.72	-7		
Average spend per trip	£227.96	£253.15	11	£250.07	-1
Average spend per night	£56.80	£68.04	20	£62.31	11

OVERSEAS STAYING VISITORS	2010	2015	Change %	Compound Inflation Rate	Change %
Average nights per trip	6.33	5.89	-7		
Average spend per trip	£380.33	£379.78	-0	£417.22	-6
Average spend per night	£60.11	£64.51	7	£65.94	11
DAY VISITS	2010	2015	Change %	Compound Inflation Rate	Change %
Average spend per trip	£47.64	£36.98	-22	£52.27	-34

<sup>2</sup> South West Research Company Visitor Data, inflation rates added by TDA

## ACCOMMODATION SUPPLY<sup>3</sup>

Provider	Unit	2014	2015	Change %
Hotels	bedspaces	9,404	9,404	5
Guesthouses	bedspaces	4,123	4,123	10
Inns	bedspaces	22	22	22
B&B	bedspaces	458	458	10
Farms	bedspaces	0	0	0
Self catering	units	1,127	1,127	0
Touring caravans/tents	pitches	1,286	1,286	31
Static vans	pitches	404	404	-54
Holiday centres	units	1,336	1,336	63
Group accommodation	bedspaces	84	84	100
Campus	bedspaces	50	50	100
Second homes	units	1,206	1,206	70
Marinas	berths	1,095	1,095	0
TOTAL		20,595	20,595	10
Residents	resident population	133,000	133,400	-1
Language schools	establishments	9	9	100

<sup>3</sup> South West Research Company

# TORBAY ACCOMMODATION OCCUPANCY

## Occupancy Rates<sup>4</sup>

Month	All Serviced Room %	Hotel Room %	B&B/ Guest House %	Serviced Room Torquay %	Serviced Room Paignton %	All self-catering %	Exc Holiday Parks %
Jan-13	13	15	10	16	7	14	14
Feb-13	55	62	20	49	50	18	18
Mar-13	55	60	23	60	31	62	37
Apr-13	31	35	21	20	33	41	41
May-13	67	71	45	68	64	43	43
Jun-13	76	79	57	81	61	61	64
Jul-13	79	82	65	80	75	70	78
Aug-13	87	91	74	87	93	92	92
Sep-13	78	81	66	79	66	80	79
Oct-13	61	66	27	63	48	26	26
Nov-13	57	61	17	58	18	28	28
Dec-13	45	47	15	50	39	26	26
Jan-14	50	55	8	58	10	14	14
Feb-14	47	52	18	50	31	34	34
Mar-14	57	61	21	63	46	29	29
Apr-14	68	72	32	71	48	43	43
May-14	62	67	37	65	40	51	51
Jun-14	74	77	53	76	66	70	70
Jul-14	82	85	69	84	73	63	63
Aug-14	87	88	61	88	78	90	96
Sep-14	81	85	65	81	82	79	79
Oct-14	69	74	38	73	46	56	56
Nov-14	47	48	36	63	24	31	31
Dec-14	35	38	20	29	47	39	39
Jan-15	47	49	8	58	10	42	42
Feb-15	45	47	16	46	35	30	30
Mar-15	63	69	22	65	22	42	42
Apr-15	56	75	23	60	26	33	33
May-15	64	72	32	69	25	56	56
Jun-15	80	84	51	82	52	56	56
Jul-15	83	85	66	85	44	78	78
Aug-15	87	90	73	88	74	59	59
Sep-15	83	86	66	84	53	59	59
Oct-15	48	65	34	51	23	25	25
Nov-15	72	76	19	74			
Dec-15	53	57	12	55			
Jan-16	8		8				

<sup>4</sup> South West Research Company

Feb-16	55	61	12	60	8	9	9
Mar-16	66	72	23	69	49	9	9
Apr-16	25	32	23	25	19	30	30
May-16	33	30	36	38		25	25
Jun-16	64	72	54	69	43	40	40

The How's business surveys were undertaken by the South West Research Company on behalf of the English Riviera Tourism Company January 2013 - June 2016. The responses are a sample of tourism accommodation providers across Torbay. Typical sample sizes achieved from the surveys were responses from 20-40 businesses per month. This is the most reliable data for Torbay available. Some of the swings and gaps in data will therefore be accounted for by the sample size and response rate of businesses to the surveys.

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.

## ACCOMMODATION CHANGE OF USE <sup>5</sup>

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).

Application No	Type	Proposal	Date App Rec
<b>ADDITIONAL HOLIDAY ACCOMMODATION</b>			
P/2013/0419	PA	Change of Use from C3a- Dwelling, to C1- Guest House	23/04/13
P/2013/0934	PA	Change of use of annex to holiday accommodation	21/08/13
P/2013/1227	PA	Proposed conversion of existing garden annex into holiday let or guest accommodation.(Revised Description)	13/11/13
P/2013/1255	PA	Change of use from one dwelling to one residential flat and one holiday flat (resubmission of P/2013/0636)	20/11/13
P/2013/1371	PA	Conversion of an existing outbuilding/stone barn from agricultural to residential holiday let use. Change of use for a private weaving studio to allow small scale business use.	21/12/13
P/2014/0893	PA	Conversion of, alteration and extension to former Windmill to provide one unit of holiday accommodation	03/09/14
P/2015/0839	PA	Change of Use from Dwelling (C3) to Guest House (C1) with alterations to the rear including additional terrace at first floor	19/08/15
P/2015/0959	PA	Change of use of existing Church Hall studio to create holiday let accommodation	28/09/15
P/2015/1144	PA	Change of use from offices (class A2) to holiday hostel (Sui Generis)	19/11/15
<b>LOSS OF HOLIDAY ACCOMMODATION</b>			
P/2013/0470	PA	Amendments to previously approved scheme P/2011/1080/MPA to include : Addition of residential & self-catering entrance to level 0 east core, Omission of 1 bedroom self-catering apartment and increase in size of 1st floor commercial unit, Reduction in cons	04/05/13
P/2013/0631	VC	Removal of Condition ref. P/2000/1281 Condition 8 - Not for permanent occupation.	14/06/13
P/2013/0721	PA	Change of use from hotel (Use Class C1) with owner's accommodation to 5 self-contained flats (Use Class C3), with external alterations to the building	28/06/13

<sup>5</sup> Torbay Council



P/2013/0785	MPA	Erection of 165 dwellings (including 25 affordable); touring caravan park (including facilities building with office, cafe, laundry room, showers, toilets and 2-bed managers flat, 12 no. camping pods, 59 permanent touring caravan pitches, associated access	20/07/13
P/2013/0871	PA	Change of use to form four apartments, external alterations and construction of 2 no. car ports.	09/08/13
P/2013/0913	PA	Extension of time (re P/2010/0248) - change of use from hotel to 4 residential flats	15/08/13
P/2013/1211	PA	Change of use from guest house (C1) to residential (C3)	11/11/13
P/2013/1281	VC	Variation of condition 1 to application P/2003/1605 to change holiday let to permanent residence	28/11/13
P/2014/0028	MPA	Use of 13 holiday apartments for residential purposes without complying with condition 1 pursuant to P/1991/0910/PA. Works include demolition of existing Victorian bay on NE elevation and replacement with 2 storey bay extension, replacement of second floor	13/01/14
P/2014/0085	PA	Change of use from Class C1 (Hotel) to Class C3 (Dwelling house)	30/01/14
P/2014/0400	VC	Use as permanent residential flats for units 1, 2, 4, 5, 6, 10, 15 and 16 (Variation/deletion of condition to remove the month of closure ref condition B of original planning permission P/1981/1452)	30/04/14
P/2014/0425	VC	Change of use from hotel (Use Class C1) with owner's accommodation to 5 self-contained flats (Use Class C3), with external alterations to the building (Variation of condition P1 of P/2013/0721 - MMA to site plan, floor plans and elevations)	02/05/14
P/2014/0501	MPA	Demolition of existing building, construction of 14 No apartments with underground parking, revision to vehicular and pedestrian access	23/05/14
P/2014/0773	PA	Conversion to 5 apartments; Demolition of rear wing	26/07/14
P/2014/0864	VC	Use of Flat 14 as a permanent residential unit - Removing Condition B to remove the month of closure ref condition B of original planning permission P/1981/1452	26/08/14
P/2014/0865	VC	Use of Flat 9 as a permanent residential unit - Removing condition B to remove the month of closure ref condition B of original planning permission P/1981/1452	26/08/14

P/2014/0884	PA	Change of use of 3 x former holiday let flats accommodation to form a 2 bedroom domestic dwelling	28/08/14
P/2014/0992	VC	Removal of conditions (g) and (h) of previous planning permission (P/1978/0767/OA) reference (g)-manager's flat and (h)-occupancy from 1st November to 28th or 29th February.	02/10/14
P/2014/0994	VC	Removal of Condition 1 from previous planning permission P/1982/0759 - Occupancy from 16th March to 14th January.	02/10/14
P/2014/1107	PA	Change of use from hotel to house in multiple occupation (HMO) for the purposes of staff (as detailed in letter received 09.01.2015)	30/10/14
P/2015/0006	PA	Change of use from holiday accommodation to permanent residential	05/01/15
P/2015/0117	VC	Variation of Condition from holiday to residential property	09/02/15
P/2015/0346	PA	Change of use from hotel to two dwellings; partial demolition and alterations to rear (as revised by plans received 26.06.2015)	08/04/15
P/2015/0715	MPA	Change of use of hotel to form 10 flats including communal space and 9 car parking spaces. Demolition of more recent additions to villa and remodelling of some existing extensions, new windows and balconies. Modification of roof to include slated pitched	15/07/15
P/2015/0836	MPA	Demolition and Redevelopment to form 32 retirement apartments for the elderly including communal facilities, access, car parking and landscaping (revision of P/2014/1062) (revised)	19/08/15
P/2015/0955	VC	Removal of condition 1 (P/2009/0849). Removal of holiday restriction and change to holiday/owners accommodation. Condition 1 - Accommodation should not be used for residential use.	25/09/15
P/2015/1035	CE	House in Multiple Occupation	21/10/15
P/2015/1066	PA	Change of use from guest house (C1) to residential (C3).	29/10/15
P/2016/0070	PA	Conversion of annexe from 2 flats to single dwelling for owners accommodation (The proposed development to which the application relates is situated within 10 metres of relevant railway land)	20/01/16

#### HOLIDAY ACCOMMODATION INVESTMENT

P/2013/1113	PA	Alterations and extension to the existing hotel to form a new spa facility on the lower ground floor level.	17/10/13
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P/2013/1209	MPA	Erection of single and two storey roof level hotel bedroom extension. Reconstruction of west wing of hotel. Reconstruction of existing three storey wing on NE elevation to provide 4 storey block of additional guest accommodation. New Spa and gym facility	09/11/13
P/2013/1306	PA	Erection of spa building to provide facilities ancillary to existing hotel (Use Class C1), together with waterside building and 6 no. beach huts to provide additional hotel accommodation (9 bedrooms), with associated decking and landscaping	06/12/13
P/2013/1320	PA	Alterations and separation of Nos.12 & 13 (reinstatement of original separate properties) to form 11 bedroom hotel (No.12) and 7 Holiday Apartments (No.13). Single storey extension at rear to form Utility Room for No.12.	11/12/13
P/2014/0141	MPA	Revised plans; Demolition of all existing holiday chalet units (185 total); existing facilities building; staff accommodation building; and two separate buildings used for storage on part of the Riviera Bay Holiday Park. Proposed development of 72 new se	14/02/14
P/2014/0909	MPA	Change of use from former Hotel to 8 x holiday letting apartments with 2 x full residential use apartments on the top floor.	04/09/14
P/2014/0997	MPA	Proposed touring caravan area to provide for 42 touring pitches with a facilities building.	03/10/14
P/2014/1020	PA	Removal and Replacement of first floor chalets	08/10/14
P/2015/1106	VC	Erection of spa building to provide facilities ancillary to existing hotel (Use Class C1), together with waterside building and 6 no. beach huts to provide additional hotel accommodation (9 bedrooms), with associated decking and landscaping (Variation of	11/11/15

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