

Tuesday, 4 August 2026

OVERVIEW AND SCRUTINY BOARD

A meeting of **Overview and Scrutiny Board** will be held on

Wednesday, 12 August 2026

commencing at **5.30 pm**

The meeting will be held in the Banking Hall, Castle Circus entrance on the left corner of the Town Hall, Castle Circus, Torquay, TQ1 3DR

Members of the Committee

Councillor Long (Chair)

Councillor Bryant

Councillor Cowell

Councillor Douglas-Dunbar

Councillor Fellows

Councillor Johns

Councillor Law

Councillor Spacagna (Vice-Chair)

Councillor Stevens

Councillor Tolchard

A Healthy, Happy and Prosperous Torbay

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Town Hall, Castle Circus, Torquay, TQ1 3DR

Email: governance.support@torbay.gov.uk - www.torbay.gov.uk

OVERVIEW AND SCRUTINY BOARD AGENDA

1. **Apologies**
To receive apologies for absence, including notifications of any changes to the membership of the Board.
2. **Minutes** (Pages 3 - 8)
To confirm as a correct record the minutes of the meeting of the Board held on 8 July 2026.
3. **Declarations of Interest**
 - a) To receive declarations of non pecuniary interests in respect of items on this agenda

For reference: Having declared their non pecuniary interest members may remain in the meeting and speak and, vote on the matter in question. A completed disclosure of interests form should be returned to the Clerk before the conclusion of the meeting.
 - b) To receive declarations of disclosable pecuniary interests in respect of items on this agenda

For reference: Where a Member has a disclosable pecuniary interest he/she must leave the meeting during consideration of the item. However, the Member may remain in the meeting to make representations, answer questions or give evidence if the public have a right to do so, but having done so the Member must then immediately leave the meeting, may not vote and must not improperly seek to influence the outcome of the matter. A completed disclosure of interests form should be returned to the Clerk before the conclusion of the meeting.

(Please Note: If Members and Officers wish to seek advice on any potential interests they may have, they should contact Governance Support or Legal Services prior to the meeting.)
4. **Urgent Items**
To consider any other items that the Chair decides are urgent.
5. **Budget Monitoring 2026/2027 Quarter 1** (To Follow)
To consider the Council's Budget Monitoring Report 2026/2027 for Quarter 1 and make recommendations to the Cabinet.
6. **Performance Report 2026/2027 - Quarter 1** (To Follow)
To consider the Council's Performance Report 2026/2027 for Quarter 1 and make recommendations to the Cabinet.
7. **Revised Destination Management Plan** (Pages 9 - 102)
To consider the revised Destination Management Plan and give feedback to the Cabinet.

Minutes of the Overview and Scrutiny Board

8 July 2026

:- Present :-

Councillor Spacagna (Vice-Chair)

Councillors Cowell, George Darling, Fellows, Fox, Harvey, Johns, Barbara Lewis,
Spacagna (Vice-Chair) and Stevens

(Also in attendance: Councillors Billings, Bye, Law (virtually), Long (virtually) and
Chris Lewis)

7. Apologies

An apology for absence was received from Councillor Bryant. It was also reported that, in accordance with the wishes of the Liberal Democrat Group, the membership of the Board had been amended to include Councillors George Darling, Harvey and Fox in place of Councillors Long, Law and Douglas-Dunbar for this meeting only.

Councillors Law and Long attended the meeting virtually and took part in the discussion but did not vote as they were not Members of the Board for this meeting. The Vice-Chair, Councillor Spacagna Chaired the meeting.

8. Minutes

The minutes of the meeting of the Board held on 3 June 2026 were confirmed as a correct record and signed by the Vice-Chair.

9. Declarations of Interest

Councillor Cowell declared a non-pecuniary interest in item 5 Torbay Local Plan Regulation 19 Publication as a Member of the Torquay Neighbourhood Forum.

10. Torbay Local Plan Regulation 19 Publication

The Board considered the submitted report on the Torbay Local Plan Regulation 19 Publication, together with the responses to key lines of enquiry and a letter from the Torquay Neighbourhood Forum, which were circulated prior to the meeting.

The Cabinet Member for Place Development and Economic Growth, Councillor Chris Lewis outlined the work undertaken by the cross-party Local Plan Working Party and emphasised the importance of submitting the Plan by December 2026. Members were advised that failure to meet this deadline could delay adoption by up to three

years and leave Torbay vulnerable to development pressures due to the absence of an up-to-date Local Plan and five-year housing land supply.

The Board heard a representation from the Chair of the Torquay Neighbourhood Forum, Dr Horder, who expressed concerns regarding the Forum's involvement in the Local Plan process, the treatment of consultation responses and the inclusion and exclusion of specific development sites.

Members discussed the need for a balanced approach to the Plan, the housing target requirements set by Government, the constraints facing Torbay, the treatment of individual sites and the importance of presenting a united position to support progression of the Plan.

Officers advised that the Plan had been developed using an evidence-led approach, that Torbay's environmental and geographical constraints limited the number of deliverable housing sites, and that consultation responses had influenced revisions between Regulation 18 and Regulation 19. It was agreed that the consultation responses received during Regulation 18 and action taken would be shared with Dr Horder and all Councillors.

It was noted that progressing to Regulation 19 remained important regardless of Local Government Reorganisation, with opportunities to review matters following consultation before final submission. Representations on the Regulation 19 consultation, and any resulting recommended modifications, will be considered by the Local Plan Working Party and Full Council, prior to being submitted to the Secretary of State for Examination (Reg 22 stage).

Resolved:

That the Overview and Scrutiny Board supports the Cabinet recommending to Council:

1. that, subject to 2 below, the Torbay Local Plan: Publication Plan (attached as Appendix 2 to the submitted report) be approved for publication for a 6-week consultation under Regulation 19 of the Town and Country Planning (England) Regulations 2012 (as amended);
2. that the Director of Pride in Place, in consultation with the Cabinet Member for Place Development and Economic Growth, be delegated authority to make final minor editorial amendments to the Plan and publish supporting technical reports as part of the consultation; and
3. that, in discussions with neighbouring authorities, the Council's position is that Torbay's unmet housing need should be addressed at a sub-regional level, through the Spatial Development Strategy.

(Note: Prior to consideration of the item in Minute 10, Councillor Cowell declared a non-pecuniary interest as a Member of the Torquay Neighbourhood Forum.)

11. SWISCo Annual Report 2025/2026

The Board considered the submitted SWISCo Annual Report 2025/26, together with responses to key lines of enquiry which were circulated prior to the meeting. The Cabinet Member for Pride in Place, Transport and Parking, Councillor Billings highlighted continued progress in service delivery and operational performance.

Members welcomed improvements achieved since SWISCo's establishment, particularly investment in parks and public spaces, whilst raising concerns regarding recycling collections, grass cutting, communication with residents, staffing pressures and highway maintenance.

Members asked questions in respect of the following:

- What proportion of Torbay's total footpath and bridleway network is maintained by SWISCo? (Details on the full rights of way would be provided in writing.)
- What were the current recycling rates and what challenges were affecting performance? (A breakdown of recycling figures would be provided in writing.)
- How can residents access better information about grass cutting and maintenance schedules?
- Can reporting systems provide acknowledgements and completion updates for residents and Councillors reporting on behalf of residents?
- How does SWISCo manage access issues caused by parked vehicles?
- How are staff recruited and supported?
- How are weeds, potholes and road maintenance being managed in residential areas?
- How can communication around missed collections be improved?

The following responses were received:

- Performance had been affected by sickness absence, waste transfer station repair work and operational pressures.
- Collection services had improved and had largely returned to schedule. Every day the Team must reprioritise what can be delivered based on available staff and vehicles, which sometimes meant that green waste collections have to be delayed to enable missed food waste to be collected. The increased volume of cardboard was also having an impact as it was filling up the lorries quickly requiring them to be emptied more regularly.
- A more visible online dashboard was being developed to improve public information. The Council was required by the Department for Transport to publish an annual Local Highways Maintenance Transparency report, with the latest report showing the Council rated green – see [Local Highways Maintenance Transparency Report 2025/2026 - Torbay Council](#).
- When new Traffic Regulation Orders were implemented parking restrictions were put in place restricting access to the roads, where vehicles cause obstructions, the Team will go back as soon as possible to complete the work.
- SWISCo continue to recruit directly with vacancies being advertised on both the SWISCo and Council websites, supplemented by agency staff where necessary. As an employer of choice there were informal arrangements in

place to help employees get to work early, where public transport was not available.

- Weed treatment and highway repairs were progressing through planned and reactive programmes.
- Missed collection information was published online and residents were encouraged to report issues through established channels, if their bins had not been collected within 48 hours of their normal collection day (with bins expected to be left out for this period – see [My bin hasn't been collected - Torbay Council](#)).

Members requested future reports to include greater analysis of recycling figures, including separate reporting of green waste.

Resolved (unanimously):

1. that the Overview and Scrutiny Board express their thanks and gratitude to the SWISCo staff for all their hard work and note the content of the SWISCo Annual Report 2025/2026 demonstrating SWISCo's continued role as a key delivery partner for place-based services across Torbay; and
2. that Cabinet be recommended to request SWISCo to implement a public dashboard similar to that published for the SWISCo Shareholder Panel, with an ambition to look forward as well as looking back, and for reporting feedback to acknowledge submission and provide feedback that the work has been completed.

12. Costs & efficiencies arising from the closure of Torbay Economic Development Company

The Board considered the submitted report on the costs and efficiencies arising from the closure of the Torbay Economic Development Company. The Cabinet Member for Place Development and Economic Growth, Councillor Chris Lewis placed on record his thanks to the staff for all the work that they had done to ensure a successful transition from Torbay Economic Development Company (known as TDA) to Torbay Council. He highlighted the improved approach to working together across departments on the biggest regeneration programme in the history of Torbay.

Members acknowledged the integration of services and recognised the positive collaborative working now taking place across the Council.

Members asked questions in relation to the following:

- When will the ongoing revenue pressure reduce?
- What are the financial implications of the different accounting approaches previously used?
- How do transition costs compare with longer-term efficiency savings?

The following responses were provided:

- Most ongoing costs related to IT and operational support functions transferred into the Council.
- Further work was required to confirm the overall long-term net financial impact. (A written response be provided on the saving from the fee, income from assets and what the difference is between these and the impact on the revenue budget going forward.)
- Additional efficiencies were expected to emerge through service reviews up to 2027.

Resolved (unanimously):

1. that the Overview and Scrutiny Board note the financial position including £590,032 transition costs and £227,711 ongoing impact;
2. that the Overview and Scrutiny Board note progress on efficiencies and integration; and
3. that the Overview and Scrutiny Board recognise further efficiencies will be realised through service reviews up to 2027.

13. Local Government Reorganisation Update

The Board considered and noted the submitted report which provided an update on Local Government Reorganisation (LGR). It was anticipated that the outcome of LGR would be announced on 14 or 15 July before the Government goes on Summer break.

Members received an update on the work undertaken to prepare for the next stage of the reorganisation process. The Director of Corporate Services, Matthew Fairclough-Kay advised that significant progress had been made across key workstreams and that support arrangements were in place to assist with the development of proposals across Devon.

Discussion focused on organisational preparedness and lessons emerging from the work completed to date. It was noted that most workstreams were progressing well, with lower completion rates primarily relating to areas that would not be required immediately at implementation stage. KPMG had been appointed as a strategic partner to assist with the development of future proposals. They have experience of LGR and had worked with the Districts in Devon to develop their proposal so had good knowledge about the area. Ongoing work would focus on prioritisation of resources and management of future budget pressures.

Chair

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Report title: Destination Management Plan Review

Report to: Overview and Scrutiny Board

Date: 12th August 2026

Lead Cabinet Member: Councillor Jackie Thomas,
Cabinet Member for Tourism, Culture & Events and
Corporate Services and Chairwoman of Standards
Committee,

Email: Jackie.thomas@torbay.gov.uk

Lead Director: Alan Denby, Director of Pride in Place

Email: alan.denby@torbay.gov.uk

Wards affected: All

1. Summary of Report:

- 1.1 The purpose of the report is to update Councillors on the Destination Management Plan (DMP) review and the refreshed DMP.
- 1.2 To ensure Torbay continues to develop, remain competitive as a destination, and respond to an evolving marketplace, the DMP has been reviewed and refreshed. It focuses on maximising Torbay's tourism growth potential through a collaborative, place-based and business-led approach, bringing together businesses, communities, and partners to enhance the visitor experience while embedding sustainable and inclusive practices, supporting its aim as the UK's premier coastal destination.
- 1.3 The DMP provides a single strategic framework for the development and management of Torbay as both a visitor destination and a place. It sets out a collaborative blueprint to maximise Torbay's tourism potential requiring active stakeholder involvement to deliver a vibrant visitor economy that benefits residents and visitors alike. While the English Riviera remains Torbay's visitor brand, the refreshed DMP adopts a place-based approach aligned with both the Torbay Story and the Corporate and Community Plan. It recognises the visitor economy not as a standalone sector but as a catalyst for wider place-based outcomes, including employment and skills, culture, investment, infrastructure development, and community pride and wellbeing.

2. Recommendations and Proposed Decision:

- 2.1 That the Overview and Scrutiny Board consider the revised Destination Management Plan and make recommendations to Cabinet on where they consider the Plan may be strengthened.

3. Reasons for Recommendations/Proposed Decision:

- 3.1 The DMP will grow Torbay's visitor economy by celebrating its unique heritage, culture and natural environment. It will reinforce Torbay's position as the UK's premier coastal destination, while enhancing the visitor experience and fostering pride in place.
- 3.2 The plan sets out a more collaborative, business-led and place-based approach, underpinned by a clear framework. It recognises the visitor economy as a key economic strength and growth sector, supporting jobs, businesses and inward investment.
- 3.3 It promotes a more sustainable, inclusive and year-round visitor economy, strengthening Torbay's overall place offer and improving resilience for residents, visitors and businesses alike.
- 3.4 The refreshed DMP delivery model strengthens leadership and governance through a place and business-led approach. This includes the creation of the Visitor Economy Cluster (VEC) to align priorities, maximise resources and delivery, and give the visitor economy a stronger voice in decision-making.
- 3.5 The DMP supports the Council's vision of a healthy, happy and prosperous Torbay by driving economic growth, supporting local businesses and jobs, and attracting inward investment. It reinforces tourism as a key economic specialism, enabling growth while placing the community, destination and visitor economy at the heart of a refreshed, evidence-based and collaborative approach to destination management.

4. Background and Context:

- 4.1 A review of the DMP is complete. The purpose of the review is to ensure that the plan remains relevant, responsive to changing market conditions and is fit for the future in its delivery to support a more resilient, productive and sustainable growing visitor economy as the UK's premier coastal destination.
- 4.2 The DMP is a strategic policy framework sitting beneath the Torbay Economic Growth Strategy and is led by the Destination Management Group (DMG). Delivered through a partnership approach, DMG members take collective responsibility for setting direction, co-ordinating activity and driving outcomes across the destination. As part of the DMP review the governance management structure has also been reviewed.
- 4.3 The current DMP has delivered tangible outcomes to strengthen Torbay's year-round visitor economy. This includes the development of Geopark Discovery Experiences, growth in business tourism through Meet English Riviera, the creation of the SUP Hub positioning

Torbay as the UK home of paddleboarding and securing the 2026 SUP World Cup, revitalised events such as Seafood Feast, strengthened cruise tourism, improved event impact reporting, and effective partnership-led business support during the 2024 *Cryptosporidium* outbreak.

- 4.4 The DMP review comes at a pivotal time for stabilising and growing Torbay's visitor economy. With significant place development and investment, it's time to reflect on the current DMP and its approach to ensure the plan will support the destination to develop, unlock new opportunities and remain competitive in an evolving marketplace.
- 4.5 Torbay's future success will depend not only on its ability to showcase its unique assets, but also on the strength of its foundations. The Torbay Story provides a narrative that celebrates the area's rich cultural heritage, locally distinctive food and drink, the South West Coast Path and internationally recognised Agatha Christie and the English Riviera UNESCO Global Geopark status offer powerful tools for storytelling and attracting new audiences to support year-round tourism.
- 4.6 The refreshed DMP proposes a shift towards a more business-led place-based approach, where businesses play a stronger role in shaping, leading and delivering activity within the priorities. This approach recognises that businesses are best placed to develop sector-specific initiatives, build and shape the destination narrative, and respond quickly to market opportunities. The DMP provides the strategic framework within which delivery can thrive, with Torbay Council playing a key enabling role by supporting, coordinating and feeding into delivery where appropriate, while also strengthening the collective voice of the sector at a strategic level.
- 4.7 Torbay Council plays a vital role in delivering the DMP, providing public services and those place-shaping 'brilliant basics' such as parking, public realm improvements, tackling antisocial behaviour, enabling events, cultural programming, and providing business support. Working collaboratively with place partners, these services are essential to enhancing the visitor experience, driving footfall, and helping local businesses thrive. By embracing these place-based strengths and focusing on quality, inclusion, and innovation, Torbay can continue to evolve as a vibrant, resilient, and premier coastal destination that benefits both residents and visitors.
- 4.8 Whilst Torbay Council is not solely responsible for delivering the DMP, the review recommends the need for a dedicated resource to manage and co-ordinate partnership working and to oversee the effective delivery of the priorities and actions, ensuring the plan's successful implementation and long-term impact.

5. Alternative Options Considered:

- 5.1 Continue with the existing DMP, but this is no longer fit for purpose and out of date.
- 5.2 Adopt the refreshed DMP as set out in Appendix 1 to the submitted report.

6. Contribution to Council Priorities:

- 6.1 The refreshed Destination Management Plan (DMP) 2026–2036 supports the Council's Corporate and Community Plan by helping to grow Torbay's economy, create jobs, attract investment and strengthen local communities. Aligned with the Torbay Story and the Economic Growth Strategy, the DMP recognises the visitor economy as an important contributor to Torbay's long-term prosperity and wellbeing.
- 6.2 The DMP takes a place-based approach, recognising that a successful visitor destination benefits both residents and visitors. It supports the development of high-quality public spaces, cultural and leisure opportunities, community safety and sustainable growth, helping to create a place where people want to live, work, invest and visit.
- 6.3 The Plan also promotes partnership working across the public, private and voluntary sectors, ensuring that activity and investment are aligned around shared priorities. While delivery of the DMP is a shared responsibility, it provides a framework that helps the Council support its wider priorities for economic growth, place development, sustainability and community pride.

7. Consultation and Engagement:

- 7.1 Various engagement activities have been undertaken during the development of the DMP review including Destination Management Group and key stakeholder deep dives, online business and stakeholder survey, one-to-one interviews and group sessions. These activities enabled wide-ranging input, in-depth discussion of priorities, vision development and identification of stakeholders interested in supporting the ongoing delivery and development of the action plan.
- 7.2 Engagement findings have informed the refreshed DMP, demonstrating strong support for changes to management and governance, and a more business-led approach. Feedback has shaped the Plan by strengthening its focus on sustainability, year-round tourism, and shared ownership. As a result, the DMP better reflects local priorities, has strong business and stakeholder buy-in, and provides a more robust foundation for effective delivery and long-term impact.
- 7.3 As a policy framework document, the DMP is currently going through public consultation, 22 July-2 September 2026

8. Implications:

Financial Implications:

- 8.1 The DMP is a partnership framework to support place and develop Torbay's visitor economy and isn't solely for the council to deliver.
- 8.2 The recommendation of a dedicated resource to oversee DMP implementation should be considered alongside existing Economic Development priorities, budgets and staffing

resources, reflecting the current approach to service review and efficiency improvements. This approach aligns with the Economic Growth Strategy, where dedicated leads have been established to support other key growth sectors.

- 8.3 The DMP priority most relevant to the Council is Priority 7: 'Destination Ready – Strengthening Infrastructure and Accessibility', which relates to public services, the public realm, town centres, and transport. The Plan proposes developing the action plan with relevant leads and key stakeholders, aligning it with existing service planning. This is likely to involve refining current plans or engaging tourism partners, rather than requiring additional resources or creating significant financial implications.

Legal Implications:

- 8.4 There are no legal implications with this proposal.

Corporate Parenting/Children and Young People:

- 8.5 This approach aligns with Torbay's ambition to become a Child Friendly place, recognising the importance of ensuring children and young people feel safe, included and valued within the destination. It also reflects the role of the visitor economy in supporting wider outcomes, including community wellbeing, aspiration, and opportunities for future generations.

Contributions to tackling climate change or achieving carbon neutrality:

- 8.6 The refreshed DMP is aligned to strategy and activity including the Torbay Climate Partnership, A Greener Way for Our Bay, the English Riviera UNESCO Global Geopark and the assets of our blue and green space within Torbay.
- 8.7 The Plan supports Torbay's sustainability ambitions with sustainability as a key priority, offering the opportunity to think about the approach and actions which will help support Torbay's visitor economy towards becoming more sustainable, environmentally and economically resilient.

Social Value Considerations:

- 8.8 Not applicable.

Procurement Implications:

- 8.9 The DMP Review followed a three-quote procurement process inviting local and regional suppliers to submit proposals, aligning to Torbay's commitment to Community Wealth Building. Following this process, Tomorrow's Tourism was appointed to deliver the review and refresh the Destination Management Plan (DMP).
- 8.10 The DMP links to thriving economy in particular the ambition to be the UK's premier coastal destination.

Other Implications:

- 8.11 Not applicable.

9. Equalities Impact Assessment:

Protected characteristics under the Equality Act and groups with increased vulnerability	Data and insight	Equality considerations (including any adverse impacts)	Mitigation activities	Responsible department and timeframe for implementing mitigation activities
Age	18% of Torbay residents are aged under 18 years old. 55% of Torbay residents are aged between 18 to 64 years old. 27% of Torbay residents are aged 65 and older.	The refreshed DMP takes an inclusive, place-based approach that supports people of all ages by improving access to employment, skills, services and high-quality places, contributing to Torbay's long-term economic and social wellbeing.	Not applicable	
Carers	- At the time of the 2021 census there were 14,900 unpaid carers in Torbay. 5,185 of these carers provided 50 hours or more of care.	The refreshed DMP takes an inclusive, place-based approach that supports the visitor economy and Torbay's wider social and economic wellbeing. By focusing on priorities such as workforce development, business collaboration and improving accessibility, the plan looks to support people from across different backgrounds.	Not applicable	

Protected characteristics under the Equality Act and groups with increased vulnerability	Data and insight	Equality considerations (including any adverse impacts)	Mitigation activities	Responsible department and timeframe for implementing mitigation activities
Care experienced	As of January 2026, there were 277 former care experienced young people aged 18-24 in Torbay.	The refreshed DMP takes an inclusive, place-based approach that supports the visitor economy and Torbay's wider social and economic wellbeing. By focusing on priorities such as workforce development, business collaboration and improving accessibility, the plan looks to support people from across different backgrounds.	Not applicable	
Disability	In the 2021 Census, 23.9% of Torbay residents answered that their day-to-day activities were limited a little or a lot by a physical or mental health condition or illness.	The refreshed DMP takes an inclusive, place-based approach that supports the visitor economy and Torbay's wider social and economic wellbeing. One of the key priorities is on accessibility and inclusion, ensuring that the plan supports people across different ages, abilities and backgrounds, while contributing to improved health, inclusion and long-term economic resilience.	Not applicable	

Protected characteristics under the Equality Act and groups with increased vulnerability	Data and insight	Equality considerations (including any adverse impacts)	Mitigation activities	Responsible department and timeframe for implementing mitigation activities
Gender reassignment	In the 2021 Census, 0.4% of Torbay's community answered that their gender identity was not the same as their sex registered at birth.	The refreshed DMP takes an inclusive, placed-based approach that supports the visitor economy and Torbay's wider social and economic wellbeing. The DMP focuses on a variety of priorities including workforce and skills development, business collaboration, accessibility, and sustainability to support inclusive economic growth for all.	Not applicable	
Marriage and civil partnership	Of those Torbay residents aged 16 and over at the time of 2021 Census, 44.2% of people were married or in a registered civil partnership.	The refreshed DMP takes an inclusive, placed-based approach that supports the visitor economy and Torbay's wider social and economic wellbeing. The DMP focuses on a variety of priorities including workforce and skills development, business collaboration, accessibility, and sustainability to support inclusive economic growth for all.	Not applicable	
Pregnancy and maternity	Between 2013 and 2024, the rate of live births (as a proportion of females	The refreshed DMP takes an inclusive, placed-based approach that supports	Not applicable	

Protected characteristics under the Equality Act and groups with increased vulnerability	Data and insight	Equality considerations (including any adverse impacts)	Mitigation activities	Responsible department and timeframe for implementing mitigation activities
Page 17	aged 15 to 44) has been slightly but significantly higher in Torbay (average of 56.0 per 1,000) than the Southwest (53.4) and broadly in line with England (56.3). For the period 2022 to 2024, rates in Torbay (44.6) have been significantly below England (50.0).	the visitor economy and Torbay's wider social and economic wellbeing. The DMP focuses on a variety of priorities including workforce and skills development, business collaboration, accessibility, and sustainability to support inclusive economic growth for all.		
Race	In the 2021 Census, 96.1% of Torbay residents described their ethnicity as the following: 1.6% as Asian, Asian British or Asian Welsh 0.3% as Black, Black British, Black Welsh, Caribbean or African 1.5% as being of Mixed or Multiple ethnic groups 96.1% as White	The refreshed DMP takes an inclusive, placed-based approach that supports the visitor economy and Torbay's wider social and economic wellbeing. The DMP focuses on a variety of priorities including workforce and skills development, business collaboration, accessibility, and sustainability to support inclusive economic growth for all.	Not applicable	

Protected characteristics under the Equality Act and groups with increased vulnerability	Data and insight	Equality considerations (including any adverse impacts)	Mitigation activities	Responsible department and timeframe for implementing mitigation activities
	0.4% described their ethnicity another way. - Black, Asian and minoritised ethnic communities are more likely to live in areas of Torbay classified as being amongst the 20% most deprived areas in England.			
Religion and belief	The 2021 Census showed that the residents in Torbay identify their religion and/or belief as the following; 48.5% are Christian 0.4% are Buddhist 0.2% are Hindu 0.6% are Muslim - Less than 0.1% are Sikh 0.1% are Jewish 0.7% have another religion 43.2% have no religion 6.3% did not answer	The refreshed DMP takes an inclusive, placed-based approach that supports the visitor economy and Torbay's wider social and economic wellbeing. The DMP focuses on a variety of priorities including workforce and skills development, business collaboration, accessibility, and sustainability to support inclusive economic growth for all.	Not applicable	

Protected characteristics under the Equality Act and groups with increased vulnerability	Data and insight	Equality considerations (including any adverse impacts)	Mitigation activities	Responsible department and timeframe for implementing mitigation activities
Sex	51.3% of Torbay's population are female. 48.7% of Torbay's population are male.		Not applicable	
Sexual orientation	In the 2021 Census, residents described their sexuality as follows; 89% as Straight or Heterosexual 1.7% as Gay or Lesbian 1.1% as Bisexual 0.1% as Pansexual 0.1% described their sexuality another way 7.4% of people didn't answer the question	The refreshed DMP takes an inclusive, placed-based approach that supports the visitor economy and Torbay's wider social and economic wellbeing. The DMP focuses on a variety of priorities including workforce and skills development, business collaboration, accessibility, and sustainability to support inclusive economic growth for all.	Not applicable	
Armed Forces Community	- In 2021, 3.8% of residents in England reported that they had previously served in the UK armed forces. - In Torbay, 5.9% of the population have	The refreshed DMP takes an inclusive, placed-based approach that supports the visitor economy and Torbay's wider social and economic wellbeing. The DMP focuses on a variety of priorities including workforce and skills development, business collaboration, accessibility, and sustainability to	Not applicable	

Protected characteristics under the Equality Act and groups with increased vulnerability	Data and insight	Equality considerations (including any adverse impacts)	Mitigation activities	Responsible department and timeframe for implementing mitigation activities
	previously served in the UK armed forces.	support inclusive economic growth for all.		
<i>Additional considerations:</i>				
Socio-economic impacts (Including impacts on child poverty and deprivation)	Torbay is ranked as the 39th most deprived upper tier local authority in England in the Index of Multiple Deprivation 2025.	The refreshed DMP takes an inclusive, place-based approach that supports both the visitor economy and Torbay's wider social and economic wellbeing. By focusing on workforce development, business collaboration and improved accessibility, the Plan helps create fairer access to employment, skills, services and opportunities, supporting people across different ages, abilities, backgrounds and socio-economic circumstances, while positively contributing to long-term economic resilience.	Not applicable	Torbay is ranked as the 39th most deprived upper tier local authority in England in the Index of Multiple Deprivation 2025.
Public Health impacts (Including impacts on the general health of the population of Torbay)	For the five-year period 2020 to 2024, data shows there is a 6-year life expectancy gap between	Providing increased employment opportunities can take households from 'workless' to working. This can provide	Not applicable	For the five-year period 2020 to 2024, data shows

Protected characteristics under the Equality Act and groups with increased vulnerability	Data and insight	Equality considerations (including any adverse impacts)	Mitigation activities	Responsible department and timeframe for implementing mitigation activities
Page 21	males who live in Torbay's least and most deprived areas and, a 3-year gap for females.	additional income for families to support a healthier lifestyle. The plan also looks to support the wider place area, improving Torbay's attractiveness as a place to live, work and invest, which could increase civic pride and wellbeing.		there is a 6-year life expectancy gap between males who live in Torbay's least and most deprived areas and, a 3-year gap for females.
Human Rights impacts		The refreshed DMP takes an inclusive, place-based approach that supports both the visitor economy and Torbay's wider social and economic wellbeing. By focusing on workforce development, business collaboration and improved accessibility, the Plan helps create fairer access to employment, skills, services and opportunities, supporting people across different ages, abilities, backgrounds and socio-economic circumstances, while contributing to	Not applicable	

Protected characteristics under the Equality Act and groups with increased vulnerability	Data and insight	Equality considerations (including any adverse impacts)	Mitigation activities	Responsible department and timeframe for implementing mitigation activities
		improved health, inclusion and long-term economic resilience.		
Child Friendly (Children's Rights Impact Assessment CRIA) considerations): Summarise the CRIA considerations for this proposal, including which groups of children and young people may be affected (e.g., care experienced children/young people, care leavers, children with SEND), how their rights and best interests have been considered, and any engagement undertaken with children/young people and/or their representatives. Set out any mitigations to address identified adverse impacts and how these will be monitored.		The refreshed DMP takes an inclusive, place-based approach that supports both the visitor economy and Torbay's wider social and economic wellbeing. Through focusing on improving infrastructure, inclusive place-making and a focus on quality visitor experiences, the DMP supports Torbay as a place that is welcoming and accessible for children and families.	Not applicable	

10. Cumulative Council Impact:

- 10.1 None identified. Priorities and suggested recommendations described within the DMP should have a positive cross-council impact allowing for a joined-up approach for delivery.

11. Cumulative Community Impact:

- 11.1 None identified that impacts should be positive.

12. Monitoring and Evaluation:

- 12.1 The delivery of the Destination Management Plan (DMP) will be overseen by the Visitor Economy Cluster (VEC), with overall responsibility for monitoring progress sitting with the Chair of the VEC. Regular updates on the implementation of the Plan and its outcomes will also be reported to the Torbay Place Leadership Board, ensuring ongoing strategic oversight and alignment with wider place-based priorities.
- 12.2 A set of overarching key performance indicators (KPIs) has already been identified and included within the refreshed DMP to measure progress against its vision and strategic objectives. In addition, the subgroups responsible for leading the delivery of each priority area will agree more detailed measures and actions relevant to their workstreams. This approach will provide a clear framework for monitoring performance, tracking outcomes and ensuring accountability, while allowing delivery activity to respond to emerging opportunities and challenges over the lifetime of the Plan.

Appendices:

Appendix 1: Torbay Destination Management Plan

Appendix 2: Torbay Destination Management Plan Baseline Report (evidence base)

Background Documents:

- English Riviera Destination Management Plan (2022-30) - [English Riviera Destination Management Plan - Torbay Council](#)
- Torbay Economic Growth Strategy (2022-30) - [Economic Growth Strategy - Torbay Council](#)
- Economic Strategy Evidence Base - [Economic Strategy Evidence Base - Torbay Council](#)

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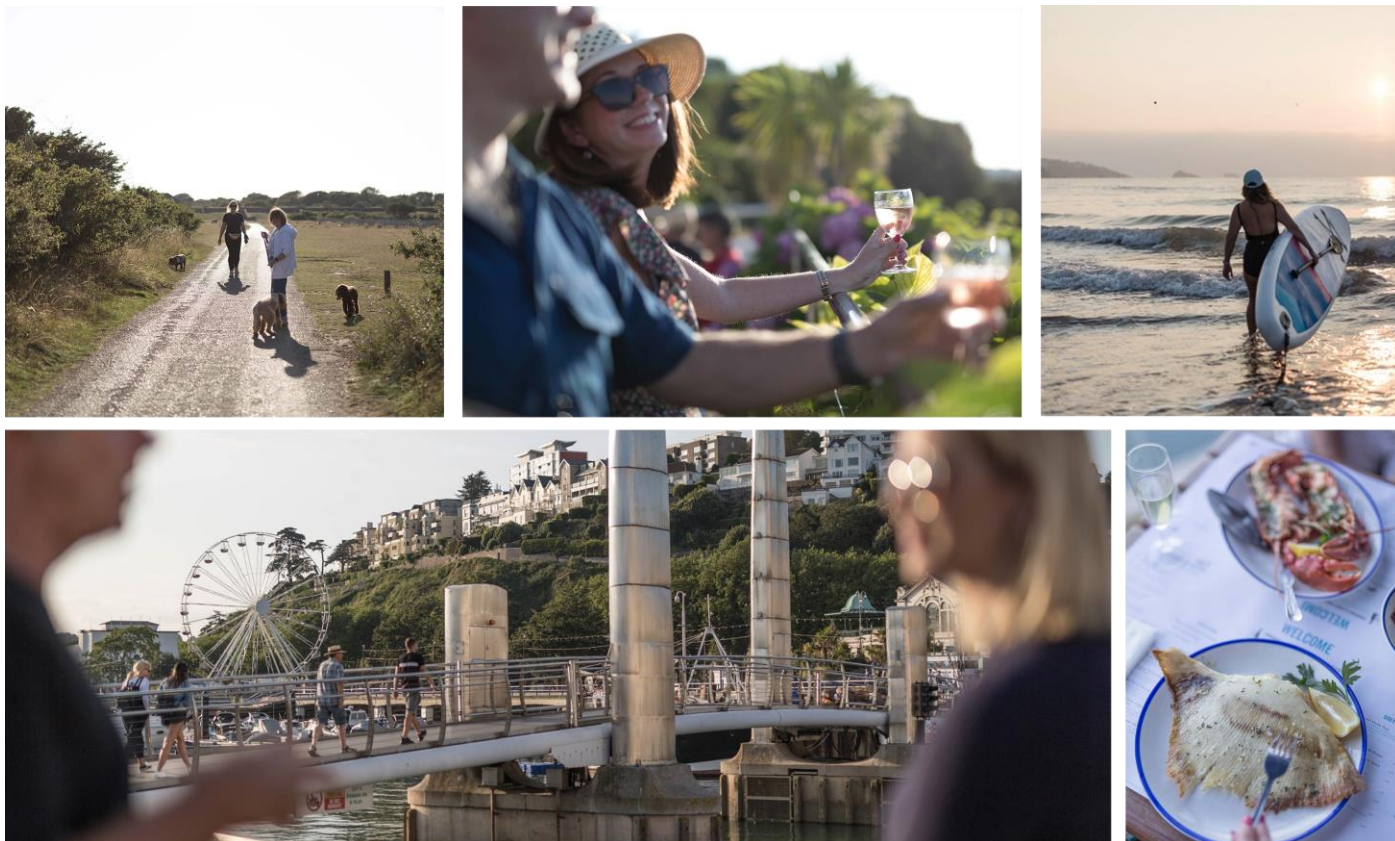


Photo: Collection of images from the Torbay Story

Torbay Destination Management Plan 2026-2036 Draft

Shaping the future of Torbay as a sustainable, vibrant, premier coastal destination.

Experience the beauty, embrace the community, elevate the future.

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1. Introduction

1.1. About the Destination Management Plan (DMP)

The DMP is an invitation to all stakeholders and businesses to work together to strengthen Torbay's visitor economy through collaboration, sustainability, and innovation. It sets out a clear, coordinated approach to achieving this, focusing on sustainable and inclusive growth by improving quality across the visitor economy and supporting businesses and communities to collaborate. Together, this approach can create an inclusive environment that celebrates Torbay's unique heritage and natural beauty, securing its position as the UK's premier coastal destination for generations to come.

The Plan provides a place based framework for Torbay as a destination. It aligns with the Torbay Story and the Council's Corporate and Community Plan, bringing together businesses, partners and stakeholders around a common vision and direction. It recognises the visitor economy as a key sector that supports jobs, businesses, and town centres, while also contributing to wider outcomes such as skills, infrastructure, culture, and community wellbeing.

Tourism plays an important role in shaping how Torbay as a place is experienced by both residents and visitors. The English Riviera will remain the destination brand, providing a strong and consistent identity through which Torbay is promoted.

This Plan sets out long-term priorities to improve quality, support a year-round economy, and attract higher-value visits. It also responds to key challenges, including seasonality, changing visitor expectations, place quality, and workforce pressures.

The DMP is a business-led plan, with delivery shared across businesses and partners. The Council's role is to act as a facilitator, enabler, and convenor, supporting coordinated action rather than leading delivery alone. A structured partnership approach will underpin the Plan, ensuring clear roles, responsibilities, and accountability across stakeholders.

Delivery will be supported through a phased action plan to be co-designed with sector partners, focused on a small number of priority programmes and projects. Progress will be monitored through agreed performance measures, enabling partners to track impact, respond to emerging opportunities and ensure continuous improvement. The DMP will also help to align existing resources and attract further investment into Torbay's visitor economy.

The Plan has been shaped through engagement with stakeholders across the public and private sectors. To make sure the plan is delivered effectively and achieved across the destination, a new

governance structure and framework is needed. Ongoing collaboration will remain central to delivery, supported by regular partnership meetings, targeted workshops, and joint initiatives.

1.2. Vision and Priorities

The DMP aims to support sustainable and inclusive tourism that attracts investment and showcases Torbay as an appealing destination for visitors, residents, and investors.

Vision

To elevate Torbay and the English Riviera into a vibrant, year-round destination that celebrates its unique cultural heritage and stunning natural landscapes, while championing sustainability. We will provide enriching experiences that engage visitors and empower the local industry, fostering a thriving and resilient tourism sector that benefits all.

Priorities

To support the vision's delivery, the DMP sets out seven key priorities:

Priority 1: Driving leadership, governance, and collaboration. Establishing clear roles and responsibilities among all destination stakeholders.

Priority 2: Having a clear narrative – one voice, one vision. Developing a cohesive narrative that brings Torbay's visitor economy together to connect with the aspirations of the Torbay Story, positioning the visitor economy as a key driver.

Priority 3: Making data-powered decisions – unlocking insights for success. Establishing clear Key Performance Indicators (KPIs) to monitor tourism performance and visitor satisfaction. Gathering feedback and providing insights that will help tailor services and marketing strategies effectively.

Priority 4: Elevating visitor experience and innovating products. Focusing on product development and year-round events.

Priority 5: Paving the way for sustainability. Implementing eco-friendly initiatives to protect Torbay's natural assets while promoting sustainable tourism practices among local businesses.

Priority 6: Empowering talent - workforce development and training. Investing in skills development and career pathways to raise aspirations, change perceptions of tourism and hospitality careers. Working with education providers and local businesses to deliver

industry-relevant training that will strengthen workforce skills, improve service quality, support business resilience, and enhance the overall visitor experience.

Priority 7: Destination ready - strengthening infrastructure and accessibility. Prioritising investment in the revitalisation of public spaces, natural assets, and town centres and collaborating with local transport providers to improve connections and strengthen Torbay's welcoming, inclusive and accessible environment.

Overall, this DMP presents a comprehensive strategy to enhance Torbay's tourism landscape, focusing on sustainability, community engagement, and economic growth. By leveraging its unique cultural and natural assets, Torbay aims to strengthen its position as the UK's premier coastal destination that provides enriching experiences for visitors while supporting the local community.

Through coordinated action and partnership working, the Plan will address current challenges and respond to new opportunities within the tourism sector. This approach will support a more resilient, year-round visitor economy that delivers long-term benefits for businesses, residents, and partners.

It also aligns with Torbay's ambition to become a Child-friendly place, recognising the importance of ensuring children and young people feel safe, included and valued within the destination. It also reflects the role of the visitor economy in supporting wider outcomes, including community wellbeing, aspiration, and opportunities for future generations.

The success of this Plan depends on active participation across Torbay's visitor economy. Businesses, partners, and the community all have a role to play in shaping and delivering this approach, whether through investment, collaboration, innovation, or advocacy. This Plan provides a shared framework for action, but its impact will be achieved through collective effort and commitment across the destination.

2. Current Position

This section sets out the position of Torbay's visitor economy in 2026, drawing on data, trends, and stakeholder insights to inform this Plan and its priorities.

Torbay's visitor economy is a key part of the local economy and identity. It supports jobs, businesses, and town centres, contributes to culture and community pride, and helps make Torbay an attractive place to live, work, visit and invest. It also plays an important role in delivering the Council's wider ambitions for inclusive economic growth, thriving communities and improved place quality.

However, the sector is operating within a changing national and regional context. Visitor behaviour is evolving, costs are rising, and competition between destinations is increasing. While Torbay has strong assets and remains a popular destination, performance is uneven and key challenges remain. This highlights the need for a more coordinated, partnership-led, and outcome-focused approach.

2.1. National and Regional context

Across the UK, tourism continues to make a significant contribution to the economy, generating around £147 billion in 2024 (5% of the national economy¹) and supporting over 2.4 million jobs. This includes roles in hospitality, attractions, transport, and retail.⁸ Domestic tourism remains the largest part of the market, but demand for overnight stays has declined in real terms in recent years, reflecting cost-of-living pressures and increased competition from international destinations.

Within the South West, tourism generated £11.1 billion in economic output in 2024 and supported around 194,000 jobs (8% of the UK's tourism jobs).⁸ The region has a strong reliance on domestic visitors and seasonal demand, with three quarters of overnight spend coming from UK visitors. This creates both opportunities and challenges for destinations such as Torbay, particularly in terms of extending the visitor season and increasing value.

To support regional tourism, the Devon and Partners Local Visitor Economy Partnership (LVEP) is set to provide strong leadership and influence, amplifying the voice of the visitor economy at national, regional, and local levels. By collaborating closely with its partners, the LVEP aims to drive policy change, unlock funding opportunities, and make a compelling case for the growth and further development of the visitor economy within the county.

¹ VisitBritain/VisitEngland (2026) Economic Value of Tourism in the United Kingdom, Published 20 January 2026

For Torbay, this context reinforces the importance of strengthening the year-round offer, increasing visitor value, and maintaining competitiveness within a changing market.

2.2. The Value of Tourism: Torbay's current position

Torbay has a well-established visitor economy, supported by its coastline, heritage, cultural assets, and the English Riviera brand. It remains a popular destination for both overnight and day visitors and continues to make a significant contribution to the local economy.

The Volume and Value of Tourism to Torbay

- GDP Contribution: Torbay recorded total tourism spend of £428.8 million in 2024, representing 4% of the region's tourism GDP.²
- Employment: Torbay recorded 5,624 FTE tourism jobs, accounting for approximately 12% of total employment.²
- Domestic Tourism - Overnight Trips: Torbay received a total of 754,000 domestic overnight trips (3.1 million nights) in 2024, spending £230.8 million. With an average spend per trip of £384 and £83 per night in 2023, Torbay ranked among Devon's stronger performing districts. The average length of stay of 4.6 nights was also well above the county average and notably higher than more urban destinations such as Exeter and Plymouth.²
- Domestic Tourism - Day Visits: In Torbay, there were 2.7-million-day visits, representing 4% of the total for the region, and spending £137.9 million.
- International Tourism: Torbay attracted 79,000 inbound trips (547,000 nights), with a total spend of £47 million.²

However, Torbay's visitor economy has followed a mixed and uneven post-pandemic recovery. Visitor numbers rebounded in 2021 and 2022 but have since weakened, remaining below 2019 levels in 2024, indicating that overall volumes have not yet stabilised.³

Total visitor spending recovered to pre-pandemic levels in 2024, although in real terms spending in 2024 was actually still around 20% below 2019 levels. Full-time employment has not mirrored

² The Economic Impact of the Torbay Visitor Economy 2024 Produced on behalf of the English Riviera BID Company by The South West Research Company Ltd October 2025

the recovery, improving modestly in 2021–2022 before declining again in 2023 and 2024, highlighting persistent structural and labour market challenges.³

Overall, the post-pandemic period points to a visitor economy that is generating stronger revenues from fewer visitors, but with ongoing difficulties in sustaining jobs and rebuilding workforce capacity.³ This highlights a shift towards fewer visitors generating greater value, alongside a need to strengthen quality and long-term resilience. However, the sector is undergoing structural change, with increased competition, cost pressures and shifting visitor expectations.

2.3. Changing market conditions

Visitor behaviour is evolving with several key trends shaping future demand:

- Visitors increasingly seek **authentic, local, and experience-led offers**, particularly linked to culture, heritage and food
- There is growing demand for **outdoor, coastal and wellbeing experiences**, aligning with Torbay's strengths
- Visitors are more **cost-conscious**, often choosing shorter stays and looking for value
- Expectations around **sustainability** are increasing, with demand for low-impact travel and responsible destinations
- **Digital tools** and platforms are increasingly shaping how visitors plan and experience trips
- There is an opportunity to **extend the season**, with increased interest in off-peak travel

At the same time, the sector faces wider pressures including rising costs and economic uncertainty impacting visitors and businesses, and workforce shortages and skills gaps continue to impact service quality. Destinations area also aware of increasing climate risks and environmental pressures and the need to adapt to the rapid changes in technology and data. These factors reinforce the need for a more resilient, flexible, and quality-focused visitor economy.

2.4. Strategic Alignment

This Plan aligns with a range of local strategies that support economic growth, regeneration, culture, transport, and climate action. The full list of strategies is set out in appendix 3.

³ Spend data from DMP QR ME Tracker – DMP Review using ONS CPIH inflation index

All strategies emphasise the importance of enhancing the visitor economy through targeted investments, innovative product development, and strong partnerships. These strategies collectively aim to transform Torbay into a vibrant, resilient, and attractive coastal destination that benefits both visitors and the local community. A consistent theme across all strategies is the commitment to sustainability, environmental stewardship, and climate resilience to ensure a high-quality visitor experience. Many highlight the need for collaboration among stakeholders to achieve shared goals and improve the competitiveness of Torbay as a visitor destination.

Strategies stress the importance of community involvement, improving infrastructure, and fostering a sense of place to create a welcoming environment for both residents and visitors. Leveraging Torbay's rich heritage and food culture is seen as vital for attracting diverse audiences and enhancing the overall visitor experience.

Collectively, these strategic initiatives form a comprehensive framework that underscores Torbay's commitment to enhancing its visitor economy while prioritising sustainability, community engagement, and economic growth. By leveraging its unique assets and fostering collaboration among stakeholders, Torbay will firmly position itself as the UK's premier coastal destination that attracts visitors year-round, supports local businesses, and enriches the community.

3. Strengths, Challenges and Opportunities

To understand Torbay's position in 2026, engagement has been carried out with businesses and key stakeholders through one-to-one meetings, workshops, and an online survey. The findings have informed an assessment of strengths, challenges, opportunities, and risks, providing a clear picture of Torbay's current position and future potential. The following sections summarise the key findings from this engagement.

3.1. Strengths, Challenges, Opportunities and Risks

3.1.1. Strengths

Torbay is a well-established UK coastal destination, with around 22,000 bedspaces and a visitor economy that plays an important role in supporting jobs, businesses, and the area's identity. Its key strengths include a high-quality natural environment, with coastline, beaches, the English Riviera UNESCO Global Geopark and the South West Coast Path. Together with a strong cultural and heritage offer, these assets make Torbay an attractive destination for leisure and outdoor activities.

The area also benefits from a recognised tourism identity, a growing programme of events and strong cultural associations, including its connection to Agatha Christie. Accessibility supports visitor access, and recent investment in the public realm is beginning to improve perceptions and create positive momentum.

These strengths provide a solid foundation for future growth. There is an opportunity to build on them by linking the visitor economy more closely with wider priorities such as regeneration, skills, health and wellbeing, and town centre improvement, while ensuring environmental assets are protected.

3.1.2. Challenges

Despite these strengths, they do not always result in a consistent, high-quality visitor experience. Tourism in Torbay remains highly seasonal, which creates fluctuations in demand and pressures on local infrastructure.

There are also ongoing concerns about the condition and visitor perception of town centres, including issues with maintenance and the quality of the retail offer. Investment in infrastructure and attractions has not kept pace with expectations in some areas.

The sector faces workforce challenges, including skills gaps and recruitment difficulties, which can affect service quality. In addition, perceptions of antisocial behaviour and wider place quality issues can influence how the destination is viewed by visitors and investors.

There is also a lack of clarity around Torbay's overall positioning, target audiences, and messaging, which highlights the need for a stronger and more consistent place narrative.

3.1.3. Opportunities

There are clear opportunities to strengthen Torbay's visitor economy through a more joined-up and year-round approach. These include developing higher-value experiences, extending the visitor season and increasing overall visitor spend.

Opportunities also exist to continue investing in regeneration and public realm improvements, expand the events programme, and make better use of Torbay's cultural and heritage assets, including the English Riviera UNESCO Global Geopark and Agatha Christie brand. These can help create a more distinctive and marketable offer.

There is potential to grow business tourism, support workforce development, and provide stronger support for local businesses. Improving transport and connectivity, including walking, cycling and public transport, will also support a more sustainable visitor economy.

More broadly, greater collaboration across organisations will be critical to deliver these opportunities effectively.

3.1.4. Risks

The risks that may affect the performance of the visitor economy include continued seasonality, economic uncertainty, and rising costs, all of which may affect business resilience.

Torbay also faces strong competition from other UK coastal destinations. Perceptions of the area may continue to affect visitor and investor confidence if not addressed.

There are longer-term risks linked to workforce sustainability, environmental pressures, and the need to grow tourism in a way that is sustainable and balanced with community needs.

In addition, improving the use of data and performance monitoring will be important to support better decision-making and maintain confidence among partners.

3.2. Visitor and stakeholder feedback

Feedback from businesses and visitors provides consistent messages about Torbay's strengths and areas for improvement.

Visitors consistently praise Torbay's natural environment, coastline, attractions, and hospitality. The range of activities, value for money and welcoming atmosphere are also seen as positive, making Torbay an attractive destination for both first-time and returning visitors.

At the same time, feedback also identifies concerns about the condition and appearance of town centres, cleanliness, the range of shops and visitor facilities, signage, and transport connectivity. Visitors also note the limited availability of activities outside the main season.

Overall, this shows that while Torbay has strong core assets, these are not always matched by consistent quality across the whole visitor experience.

3.3. Core Challenge and Response

Torbay has a strong foundation as a visitor destination, but the main challenge is delivery.

Evidence and stakeholder feedback show that activity is often fragmented, with unclear roles and responsibilities and limited coordination between organisations.

The DMP addresses this by focusing on a more coordinated and practical approach. This includes prioritising a smaller number of high-impact actions, setting clear ownership and accountability, strengthening partnership working, and improving how progress is monitored.

It also emphasises the need for a clear and consistent place narrative, and for the visitor economy to support wider local priorities, including community wellbeing and quality of life.

3.4. Direction and Strategic Response

The evidence points to a clear direction for the future of Torbay's visitor economy. Success will depend on improving the quality and consistency of the visitor experience, supporting a more balanced year-round and higher-value offer, and strengthening the link between the visitor economy and overall place quality.

It will also require a clearer and more consistent destination narrative, alongside action to address workforce and skills challenges. In addition, there is a need to embed sustainability and accessibility across the visitor offer, and to improve the use of data and insight to support decision-making. Delivering this will require stronger coordination, clearer leadership and more effective partnership working across the sector. Without this, the challenges are likely to continue and limit future growth.

This Plan responds by setting out a clear, long-term framework for a more sustainable, resilient, and inclusive visitor economy. It aligns with the ambitions of the Council's Community and Corporate Plan and wider strategies for economic growth, regeneration, culture, transport, and climate.

This evidence highlights the need for a more coordinated, delivery-focused approach to managing the visitor economy. The following section sets out the priorities and delivery model that will guide this approach.

4. Priorities, Actions & Implementations

This section sets out how the priorities in this Plan will be delivered, including the approach, governance, roles, and responsibilities, and how partners will work together to achieve the outcomes set out in the DMP.

For partners and businesses, this Plan provides a clear route to engagement and delivery. It sets out where collaboration is needed, how activity will be coordinated, and how organisations can contribute within their own roles. This includes participating in action groups, aligning activity with agreed priorities, and supporting the shared ambition for Torbay as a destination.

Delivery will be based on a coordinated, partnership-led model, with the Council acting as a facilitator and enabling collaboration across the destination. A structured approach to governance, delivery planning and performance monitoring will support implementation.

A set of example actions and delivery opportunities has been developed through stakeholder engagement and is included in the supporting appendices. These actions provide practical guidance on how each priority can be delivered and will inform the development of detailed delivery plans. They will be refined and progressed through collaborative partnership working and the Visitor Economy Cluster as part of the implementation phase.

4.1. Strategic Priorities

The DMP is structured around seven priorities, which provide the framework for delivery.

Priority 1: Driving leadership, governance, and collaboration

This priority focuses on strengthening how the visitor economy is coordinated and delivered across Torbay. It aims to improve governance, clarify roles and responsibilities, and ensure that activity across partners is aligned and working towards shared outcomes.

Priority 2: Having a clear narrative – one voice, one vision

This priority focuses on developing a clear and consistent identity for Torbay as a destination. It aims to strengthen how the visitor economy is positioned and communicated, ensuring alignment with the Torbay Story and improving overall perception.

Priority 3: Making data-powered decisions – unlocking insights for success

This priority focuses on improving how data and insight are used to support decision-making and performance management. It aims to strengthen understanding of visitor behaviour, market trends, and destination performance.

Priority 4: Elevating visitor experience and innovating products

This priority focuses on enhancing the overall visitor experience and strengthening the quality and distinctiveness of the destination offer. It aims to support innovation and develop a more diverse, experience-led, and year-round product.

Priority 5: Paving the way for sustainability

This priority focuses on ensuring that the visitor economy develops in a way that is environmentally responsible and inclusive. It supports long-term sustainability while protecting Torbay's natural and cultural assets.

Priority 6: Empowering talent: workforce development and training

This priority focuses on strengthening the workforce and supporting businesses to improve quality and resilience. It aims to ensure that Torbay can deliver high-quality visitor experiences and adapt to changing market conditions.

Priority 7: Destination ready: strengthening infrastructure and accessibility

This priority focuses on ensuring that Torbay has the infrastructure, connectivity and accessibility needed to support a high-quality visitor experience. It aims to improve the overall functionality and attractiveness of the destination.

4.2. Delivery Approach

Delivery of the DMP will be coordinated through a strengthened partnership approach centred on the Visitor Economy Cluster (VEC). The VEC will bring together key partners, businesses, and stakeholders to support collaborative working, shared decision-making, and coordinated delivery across the destination.

The VEC will act as the main forum for setting priorities, reviewing progress, and addressing key issues. Supporting priority action groups will focus on specific themes, enabling delivery of the DMP at a practical level and encouraging wider participation from businesses and stakeholders.

Roles and responsibilities will be clearly defined, with partners contributing through agreed actions and areas of influence. Progress will be monitored regularly to ensure accountability and alignment with the Plan's objectives.

The Council will act as an enabler, supporting delivery by aligning activity across services, facilitating partnership working, and helping to secure investment and resources. This approach represents a shift towards a more proactive, coordinated, and accountable model, with shared responsibility across partners.

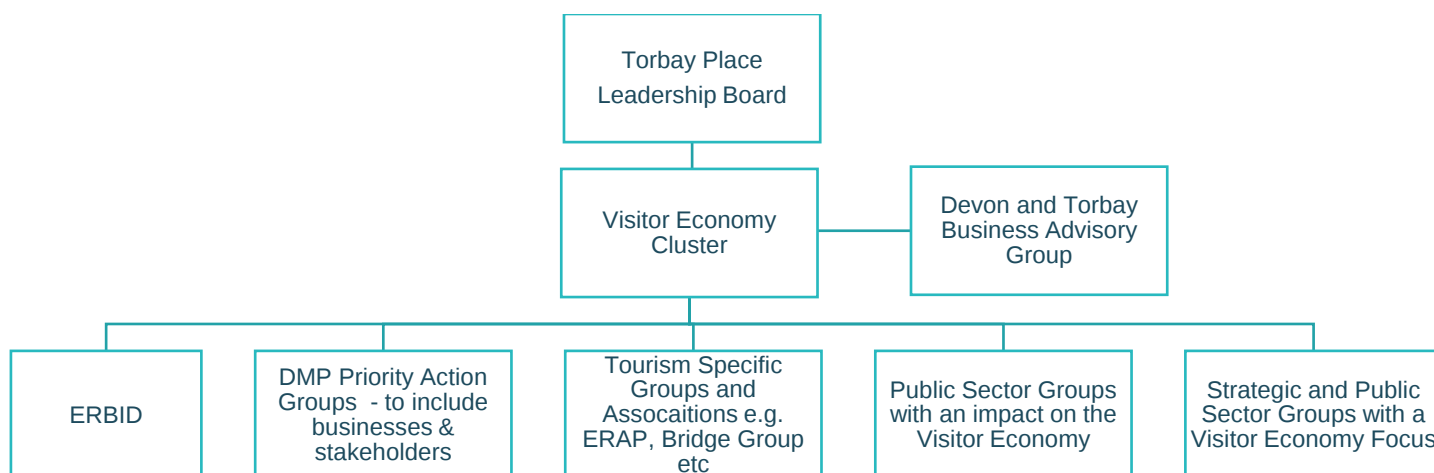


Figure 1: Model to show the delivery approach and partner roles with regards to the VEC.

Delivery of the Plan will be phased over its lifetime, with a focus on short, medium, and long-term actions. Early priorities will focus on strengthening coordination, governance and quick-win improvements, while longer-term delivery will support investment, infrastructure, and transformational change. This phased approach will ensure steady progress while allowing flexibility to respond to changing conditions and opportunities.

4.3. High-Level Actions

At this level, the framework focuses on enabling and guiding delivery rather than setting out detailed or prescriptive actions. Delivery will be supported by aligning Council activity, investment, and strategies with visitor economy priorities, alongside fostering strong collaboration across partners. This includes enabling initiatives that improve destination quality, support sustainability, strengthen the workforce, and encourage year-round activity.

The actions and recommendations set out below and within the appendices provide a practical illustration of how the seven priorities within the DMP can be delivered. They have been informed

by a review of current activity and shaped through engagement with businesses, stakeholders, and partners via workshops, consultations, and one-to-one discussions.

These actions are not intended to be fixed or exhaustive. Instead, they represent examples to guide delivery and will inform the development of more detailed plans for each priority area. These plans will be led by partnership groups and supported by the Visitor Economy Cluster (VEC).

As delivery progresses, there will be ongoing opportunities for businesses and partners to contribute ideas, align existing activity, and identify new areas for collaboration. Delivering the priorities will require sustained partnership working, clear leadership, and appropriate resourcing. The Council will play an enabling role, but delivery will be shared across the wider destination.

Priority 1: Driving leadership, governance, and collaboration

- Bring experienced local business leaders and diverse stakeholders together to form a Visitor Economy Cluster. This new cluster will advocate for change and co-ordinate stakeholder efforts in tourism development; it will also provide guidance and oversight for the DMP.
- Use the DMP as a practical framework to align tourism initiatives with regeneration and planning efforts, ensuring clarity on all organisation's contributions.
- Identify dedicated staffing and resources within Torbay Council to support implementation of the DMP and facilitate collaboration among partners.
- Create clear tools and guidance to help businesses engage with the DMP and delivery including actionable steps linked to each priority.
- Partner with key stakeholders, including the Devon and Cornwall Police and local housing providers, to align on community safety and homelessness initiatives.
- Actively engage local businesses in the DMP through joint events and collaborative marketing initiatives. Improve communication among stakeholders regarding ongoing delivery, projects, available support, and collaborative marketing efforts.
- Inspire a culture of innovation among Torbay businesses and tourism operators to adopt new approaches and enhance the visitor experience.
- Investigate the feasibility of a distinct Retail BID to secure funding for enhancing the local offer and services.

Priority 2: Clear narrative – one voice, one vision

- Better connect the visitor economy and its importance within the Torbay Story to reflect its importance as a key driver.
- Use Torbay's USPs and identity as a destination filled with history, creativity, culture, and community spirit and underpinned this with a narrative around quality authentic experiences, community values, and aspirations.
- Create a proactive communications strategy aimed at countering negative and promoting positive stories about Torbay (whilst acknowledging and addressing negative feedback).
- Use successful initiatives that highlight community strengths and success stories from local businesses and community initiatives to build a positive narrative around Torbay.
- Target outreach programmes to connect with younger demographics to gather insights about their perceptions of Torbay.

Priority 3: Data-powered decisions – unlocking insights for success

- Leverage available datasets to gather insights on visitor demographics and interests to guide targeted marketing and product development.
- Create protocols for data sharing among stakeholders to ensure transparency and effectiveness.
- Design consultation approaches that are sensitive to the current pressures faced by local businesses, such as virtual meetings, surveys, or small focus groups that respect their time constraints. Streamline the process of conducting surveys to prevent businesses being overwhelmed and to ensure higher response rates.
- Define and agree key performance indicators (KPIs) to measure the success of tourism initiatives and marketing efforts.
- Use data analytics to create detailed visitor profiles that identify key demographics, interests, and spending patterns, enabling more targeted marketing efforts, and gather insights from visitors and stakeholders about their experiences and suggestions for improvement
- Perform comprehensive assessments of major events to determine their economic impact on the local economy. This should include visitor numbers, spending patterns, and feedback from local businesses.

Priority 4: Elevating visitor experience and innovating products

- Encourage a mindset shift among stakeholders from traditional tourism models to innovative, value-driven approaches that prioritise quality experiences over quantity.
- Encourage businesses to innovate and adapt their tourism offer to meet changing market demands and visitor preferences. Organise networking events or 'product innovation labs' for local businesses to connect and collaborate on tourism initiatives and ideas.
- Create unique, themed experiences centred around Torbay's cultural, active, outdoor, and natural attractions: the English Riviera UNESCO Global Geopark, and Agatha Christie as the flagship brand, (like Shakespeare's position in Stratford-upon-Avon's marketing and branding).
- Diversify the visitor base, particularly developing strategies, and products to attract a younger audience and maximise the Visiting Friends and Relatives (VFR) market.
- Develop a strategy for co-ordinating events across Torbay to ensure a vibrant atmosphere and avoid scheduling conflicts; and increase the variety and frequency of events throughout the year.
- Create tangible visitor products and experiences which businesses can easily get on board with including local food/drink offers, events and digital tools.
- Develop a comprehensive strategy and sustainable model to grow business tourism that includes clear goals, responsibilities, and expected outcomes.
- Create experiences that are inclusive, accessible and appealing to children, young people and families, alongside ensuring that the visitor offer reflects the needs of a diverse range of users throughout the year.

Priority 5: Paving the way for sustainability

- Encourage local businesses to adopt sustainable tourism practices and community engagement initiatives such as improving resource efficiency, local sourcing and encouraging visitors to use public transport, walk or cycle.
- Ensure that attractions and public areas are fully accessible to all visitors.
- Ensure the DMP governance includes measures to oversee the integration of environmental protection measures into tourism development and develop sustainable travel initiatives.

- Promote local produce, cuisine and craft, strengthening local supply chains and collaborative links between the visitor economy and local producers and suppliers.

Priority 6: Empowering talent: workforce development and training

- Actively work to change the perception of careers in tourism and hospitality as low-skilled or seasonal jobs and to inspire the next generation into choosing the sector as an informed career choice.
- Use current and future skills funding to develop courses and training for the sector, building upon previous courses and experience (such as the use of modular training); and include Work Experience, Apprenticeships, Adult Skills Fund or Skills Bootcamps.
- Encourage businesses to attend events such as career days at schools to showcase opportunities in the visitor economy.
- Encourage greater involvement from Torbay businesses in tourism initiatives and workforce development. Establish mentorship programmes that connect experienced professionals with young people entering the tourism workforce. Involve young people in the planning and implementation of workforce development initiatives.
- Focus on quality assurance measures and implement training programmes to improve service levels and product knowledge and develop initiatives to support local tourism and hospitality businesses with enhancing their offer and visibility.
- Develop business support that provide resources, training, or financial assistance to help local businesses adapt to changing market conditions and enhance their offer.

Priority 7: Destination ready: strengthening infrastructure and accessibility

- Establish ongoing assessments of the DMP and approach to support the visitor economy in adapting to changing demands.
- Invest in infrastructure upgrades, such as updated and improved signage, to enhance visitor experiences and community satisfaction and safety, and focus on enhancing the visual appeal, functionality and accessibility of entry points to Torbay.
- Ensure that additional public and private funding opportunities to sustain regeneration efforts beyond initial public funding phases remain high on the agenda. Particularly programmes for medium-sized and larger investors to develop mixed-use properties and hotels.

- Collaborate with local transport providers to strengthen services, including evening services and better connections to attractions, will enhance accessibility for visitors.
- Ensure that public spaces, transport and infrastructure are safe, inclusive and accessible for children and young people, supporting a destination that works well for residents as well as visitors.
- Continue to invest in the improvement and maintenance of public spaces, including natural assets and town centres to enhance the overall visitor experience ensuring these spaces are inclusive and accessible for all. Address the condition and infrastructure of existing bedspaces and visitor facilities.
- Position planning, heritage, and regeneration as enablers of sustainable growth, supporting delivery, and ensuring development that reinforces Torbay's identity, while protecting its distinctive townscapes, seafront character, and historic and natural assets.
- Promote sustainable transport options by encouraging walking, cycling and public transport as primary ways to explore Torbay, supported by a joined-up, user-friendly, and accessible network that includes safe cycling routes, e-bike hubs, improved connectivity across the Bay, and enhanced direct links to key attractions and destinations.
- Integrate tourism with town centre development plans with homelessness initiatives where it impacts on the visitor economy. This could include visible policing and community safety, proactive place-making to improve public spaces. However, it is understood that social services and community organisations are working to address the root causes of homelessness and substance abuse.

4.4. Outcomes and Measures

The DMP is expected to deliver a number of long-term outcomes aligned with Torbay's Community and Corporate Plan. These include a stronger and more resilient visitor economy, improved quality of place and visitor experience, increased year-round activity, higher-value visitor spend, and stronger connections with wider priorities such as regeneration, transport, culture, and skills. It also includes understanding and improving the experiences of children and young people within Torbay's visitor economy and the wider place, as part of a broader focus on inclusion, accessibility and community wellbeing.

Progress will be measured through a defined set of indicators covering key areas such as visitor numbers and value, visitor satisfaction, destination quality, sustainability, workforce development,

and business engagement. These indicators will support regular monitoring, reporting and continuous improvement.

Performance will be reviewed through the delivery framework, with updates provided through partnership structures including the Visitor Economy Cluster and wider governance groups. An annual report will summarise progress, achievements, and areas for improvement.

Full details of indicators, targets and reporting arrangements are set out in the supporting appendices.

4.4.1. Strategic Goals

Delivering the objectives of the DMP will require coordinated action across a range of organisations, businesses, and stakeholders. The following strategic goals set out the key areas of focus to support delivery:

- **Foster collaboration among stakeholders** by creating a more coordinated and joined-up approach to tourism planning and delivery.
- **Increase local business participation** in visitor economy initiatives and partnerships over the lifetime of the Plan.
- **Strengthen community involvement** to support greater local engagement, understanding and shared benefits.
- **Grow business tourism activity**, particularly during shoulder and off-peak periods.
- **Promote environmental awareness** by encouraging responsible visitor behaviour and sustainable practices.

4.4.2. Strategic Growth Indicators

The following indicators will be used to monitor progress over the lifetime of the Plan:

1. Visitor Growth Indicators

- Increase in total value of staying visitors (annual and monthly figures reported in real terms)
- Length of Stay – in days (working against the current baseline)⁴

⁴ The average length of stay provides a useful indication of the types of visitors coming to Torbay; e.g., shorter stays suggest more short breaks, longer stays reflect traditional holiday markets, helping to guide product development.

2. Visitor Satisfaction Survey Indicators

- Improve the *Overall Impression* score to 4.5 over the Plan period.
- Improve visitor perception of *the cleanliness of the streets* to 4.25 over the Plan period ⁵
- Net Promoter Score (NPS): to evaluate how likely visitors are to recommend Torbay to others. *Move baseline to 70 over the period of the Plan (Staying Visitors)*

3. Sustainability Indicators

- Consider sign up to the GDS Index or find an alternative, to track progress against a range of measures and against peer group. (Tracks the broader progression against a range of sustainability measures that will be relevant for Torbay and enables benchmarking against similar destinations)

4. Business Community Engagement Indicators

- Local business participation: Measure the percentage of local businesses engaged in tourism initiatives and partnerships, aiming for increased participation over time⁶.
- Recognising the economic value of events to Torbay, aim to identify, scope, and assess a range of potential events that can be agreed by the VEC and taken forward from Year 2 of the Plan

5. Infrastructure and Accessibility Indicators

- The VEC to publish an annual review of the progress that Torbay is making to deliver improvement to the destination and drive growth in its visitor economy.
- Increase the satisfaction of quality of public transport services to reach 4.5

6. Cultural and Heritage Engagement Indicators

- From year 2, ensure that all major events ⁷are tracked in terms of participation and economic impact. Encourage the strategically important visitor attractions to track visitor numbers, act collectively to drive up service quality and add further value to the overall offer.

⁵ These are perception driven based on visitor feedback from the Annual Visitor Survey.

⁶ To be agreed by the VEC and priority groups.

⁷ List to be agreed by the VEC.

7. Economic Impact Indicators

- Calculate the current value of Business Tourism to Torbay and aim to grow it above the Devon trend growth rate during the Plan period.

8. Strategic Alignment Indicators

- Measure the number of stakeholders involved in DMP initiatives and aim for a year-on-year increase in participation over the Plan period.

9. Training and Workforce Development Indicators

- Track the number of tourism and hospitality related training and development programmes available for the regional workforce aiming for an increase over the Plan period.

Appendix 1: Evidence Base and Context

This appendix and accompanying Torbay Destination Management Plan Review Evidence Base, provides the supporting evidence base for the DMP. It brings together local visitor economy data, place-based insight, stakeholder engagement, and wider national and regional trends that inform the priorities and approach set out in the main document.

It is intended to support the framework and should be read alongside the main document, rather than as part of the core policy text.

National value of Tourism

Across the UK, tourism continues to make a significant contribution to economic activity and employment with a GDP contribution in 2024 of £147 billion (5% of the national economy⁸). The tourism industry supported over 2.4 million jobs in the UK in 2024, making it one of the largest employment sectors.⁸

In 2024, 4.6 million visitors came to the UK from abroad, spending £32.5 billion in local economies.⁸ In comparison, there were 1.2 billion domestic visits, comprised of 108 million overnight stays and 1-billion-day trips, spending £89 billion in the UK economy.⁸ Domestic Tourism (domestic overnight stays and day trips) is responsible for over half of total tourism spending in the UK. However, domestic overnight spend has been falling in recent years.

Since 2022, domestic overnight spending has fallen 9% in real terms (after inflation) to reach £33 billion in 2024. This decline reflects a weakening in demand for overnight travel within the UK, potentially driven by cost-of-living pressures, and increased competition from international destinations. Despite this drop, overnight stays still represent 20% of total tourism expenditure in the UK.⁸

Value of Tourism for the South West

Tourism GDP for the South West region totalled £11.1bn in 2024. The number of jobs supported by tourism in the South West was 194,000, 8% of the UK's tourism jobs.⁸

The South West received 2.4 million international visits in 2024 (5.5% of UK share), generating £1.5 billion in spend.⁹ In terms of domestic tourism, the South West recorded 15.4 million

⁸ VisitBritain/VisitEngland (2026) Economic Value of Tourism in the United Kingdom, Published 20 January 2026

⁹ Office for National Statistics (2024) International Passenger Survey

overnight trips (13% of the UK share), spending £4.5 million. Three quarters of all overnight tourism spend in the South West came from domestic visitors in 2024, compared to one quarter for London. Over 90-million-day visits were recorded in the South West, representing 10% UK share of day visits and 9% of spend.¹⁰

Key Visitor Economy Facts for Devon (2024)

- £2.6 billion annual visitor spend
- Supporting over 47,138 jobs (35,661 FTEs), 8% of total employment
- 21.3 million staying visitor nights (international and domestic)
- 22.5-million-day visits annually, generating £1.1 billion in spend.¹¹

The Devon and Partners Local Visitor Economy Partnership (LVEP) is set to provide strong leadership and influence, amplifying the voice of the visitor economy at national, regional, and local levels. By collaborating closely with its partners, the LVEP aims to drive policy change, unlock funding opportunities, and make a compelling case for the growth and further development of the visitor economy within the county.

¹⁰ VisitBritain/VisitEngland (2024) Great Britain Tourism Survey (GB Day Visitor Annual Report 2024)

¹¹ The Economic Impact of the Torbay Visitor Economy 2024. Produced on behalf of the English Riviera BID Company by The South West Research Company Ltd, October 2025

Appendix 2: Trends in the Evolving Landscape of Tourism

The tourism landscape in England is undergoing significant change, underscoring the importance of adaptability and sustainability in responding to the evolving preferences of visitors. Visitors are increasingly seeking authentic local experiences, outdoor and wellness activities, and value-driven holidays, while also showing greater awareness of environmental impact. Coastal destinations like Torbay are well-positioned to capitalise on these trends by offering unique, experience-rich stays that cater to both domestic and international visitors.¹²

- **Authentic and Local Experiences:** Visitors increasingly want to experience ‘places like a local,’ seeking connection with local culture, people and everyday life, not just iconic sites; a trend that can help destinations like Torbay showcase local food, fishing heritage, coastal walks, and small-town life. Younger visitors especially prioritise travel and unique experiences over material spending, which supports investment in curated experiences, local culture, and adventure activities.
- **Health and Well-being Tourism:** Day visits that incorporate wellness experiences have shown a continuous upward trend from 2022 to 2024. In fact, these visits reported the highest average spend per person, reaching £124 in 2024 compared to £52 for a typical day visit. This correlation illustrates the growing interest in experiences that promote physical and mental well-being, further influencing travel choices. The short-stay rental market is also closely tied to this trend, offering accommodation that cater to those seeking relaxation and rejuvenation during their travels.
- **Active and Outdoor Travel:** Following a boost (Covid-19 legacy), walking, cycling, and nature-based holidays remain popular. Interest in camping, caravanning and especially glamping remains high as a budget-friendly and ‘close-to-nature’ holiday style.
- **Cost-Conscious Travel:** Many UK visitors are planning to spend less on holidays and look for value offerings (e.g., package deals, combined accommodation, and activities) due to inflation and continued cost-of-living pressures, an issue which is increasing rather than diminishing.

¹² Sources for Trends section: VisitBritain; Mintel

- **Sustainability:** Eco-conscious planning (e.g. choosing lower impact activities and transport) and scepticism about green washing means destinations with genuine sustainable practices (e.g., electric charging, conservation) will resonate with a growing segment of visitors.
- **Artificial Intelligence:** AI and digital tools for travel planning is increasingly popular, particularly among younger visitors aged 25-34 who are highly engaged with AI-based recommendations. There is a growing demand for customised itineraries and flexible booking options, allowing visitors to tailor their experiences to their preferences.
- **Seasonal Travel Shifts:** There's emphasis on promoting travel outside peak summer months when crowds are thinner and prices softer, useful for coastal destinations with shoulder-season appeal.
- **Domestic Demand and Staycations:** UK residents continue to take domestic holidays, partly due to cost pressures, convenience, and global impacts. Coastal and countryside areas benefit strongly from this trend.
- **Inbound Market Growth:** International visits and spending in the UK are forecast to grow. Growth among key markets (especially the US and parts of Europe) suggests opportunity for coastal destinations appealing to long-haul and regional visitors.

The National Challenge

Recent global economic and political uncertainty continues to affect visitor confidence and spending. Changes to international travel regulations, visa requirements and trade agreements, alongside ongoing currency fluctuations, risk increasing costs for overseas visitors. At the same time, rising inflation and the cost-of-living crisis have reduced domestic disposable income, contributing to shorter stays, increased price sensitivity and fluctuating visitor spend across the year.

National policy changes are placing additional pressure on tourism businesses. Increases to employer National Insurance Contributions and the National Minimum Wage from April 2025 have had a disproportionate impact on sectors such as hotels, restaurants, and bars, which rely heavily on entry-level and seasonal staff. Common mitigation measures include reducing investment, limiting staffing levels or increasing prices to customers, all of which can affect service quality and business viability.

Pressures linked to seasonality, particularly during school holidays and major events mean effective visitor flow management, promotion of off-peak travel and dispersal to lesser-visited areas are increasingly important to protect the visitor experience and resident wellbeing.

Environmental sustainability remains a critical consideration. Climate change is already affecting seasonality, with warmer temperatures potentially extending the traditional summer season, while also increasing the risk of extreme weather events that disrupt outdoor activities and coastal environments. Continued collaboration between stakeholders is therefore essential to minimise impacts on natural assets, marine environment, and local communities, while supporting a transition to more sustainable tourism practices.

Finally, as technology evolves, the tourism sector must continue to embrace digital transformation. Improving online booking and information systems, using data analytics to better understand visitor behaviour, and expanding contactless and digital services will help businesses remain competitive, enhance the visitor experience and support more targeted, sustainable destination management.

Appendix 3: Strategic Alignment

This framework supports the Council's wider place-shaping role by aligning the visitor economy with broader priorities for economic growth, regeneration, culture, transport, climate response, and community wellbeing. It recognises the visitor economy not as a standalone sector, but as a key driver of place, supporting investment, skills, town centres, and quality of life.

Across national, regional, and local strategies, there is a consistent emphasis on the importance of a strong and coordinated visitor economy. These strategies highlight the need for sustainable and inclusive growth, improved infrastructure, high-quality visitor experiences, and stronger collaboration between partners. There is also a clear focus on maximising the value of heritage, culture, and natural assets, alongside developing a coherent place narrative that strengthens Torbay's identity and appeal.

The DMP aligns with a range of key strategies and policy frameworks that together provide a joined-up approach to place and destination management:

- **Community and Corporate Plan (2023–2043):** Supports place quality, inclusive growth, stronger communities, and long-term resilience.
- **Economic Growth Strategy (2022–2030):** Positions the visitor economy as a key driver of prosperity, investment, skills, and business growth.
- **Torbay Story:** Provides a unified place narrative and identity to support marketing, engagement, and investment.
- **English Riviera Destination Management Plan (2022–2030):** Establishes foundations for higher-value, year-round tourism and informs the refreshed approach.
- **ERBID Business Plan (2022–2027):** Supports destination marketing, product development and partnership working across the visitor economy.
- **Torbay Inclusion Strategy (2025–30):** Embeds equality, diversity, and inclusion across Council activity, supporting accessible places, services, and opportunities for all residents and visitors.

The DMP also aligns with a range of thematic strategies which strengthen the visitor offer and support wider place outcomes:

- **Culture, heritage, and events strategies:** Enhance the cultural offer, heritage assets and year-round events, supporting visitor experience and local identity.
- **Torbay Food Strategy (2025–2030):** Strengthens the local food offer as a key part of the visitor experience and local economy.
- **Geopark Management Plan (2023–2033):** Protects and promotes Torbay’s natural assets and global status as a UNESCO Global Geopark.
- **Outdoor Events Strategy (2021–2027):** Supports the development of a high-quality events programme to extend the visitor season.

In addition, the framework aligns with key spatial and environmental policies:

- **Local Plan:** Provides the statutory framework for land use, supporting tourism development, regeneration, and investment, including Core Tourism Investment Areas.
- **Climate and environmental strategies:** Support sustainable tourism, carbon reduction, and the protection of natural assets, including through initiatives such as *A Greener Way for Our Bay*.
- **Transport and accessibility priorities:** Support improved connectivity, active travel, and access to enhance both visitor and resident experience.

Collectively, these strategies emphasise the need for strong partnership working and shared ownership, investment in infrastructure, public realm, and destination quality with a focus on sustainability, resilience, and climate responsibility. They highlight the need for improved data, insight and performance monitoring with a clear and consistent place narrative that unites the destination and the sector.

Overall, this alignment ensures that the Destination Management Plan is fully integrated with wider Council priorities and partner activity. It provides a coordinated framework to maximise the contribution of the visitor economy to Torbay’s long-term economic, social, and environmental ambitions, supporting its position as a high-quality, year-round coastal destination.

Appendix 4: Delivery, Governance and Monitoring Framework

The Destination Management Plan (DMP) is supported by a delivery and governance approach that translates the strategic framework into coordinated action. Delivery will be underpinned by a live action plan, clear partnership arrangements, and a structured approach to monitoring and reporting progress.

The detailed delivery plan will sit beneath the framework and will be maintained as a live document. It will translate the DMP's priorities into specific actions, identifying lead organisations, timescales, and review arrangements. The Plan is based on seven core priorities, which together aim to transform Torbay's visitor economy into a high-quality, year-round, and sustainable offer.

These priorities focus on strengthening leadership and collaboration, developing a clear and consistent place narrative, improving the use of data and insight, enhancing visitor experience and product development, embedding sustainability, supporting workforce development, and improving infrastructure and accessibility. Example actions have been developed through stakeholder engagement and will be refined through partnership working as part of the delivery process.

Delivery of the DMP will be based on a shared ownership model. While Torbay Council will provide strategic leadership and act as a facilitator and enabler, delivery will be led collectively by businesses, partners and stakeholders working within their own roles and areas of influence. This approach reflects the need for a more coordinated and collaborative model, ensuring that responsibilities are clear and that activity across the destination is aligned.

A key part of this approach is the establishment of the **Visitor Economy Cluster (VEC)**, a business-led partnership bringing together representative stakeholders across the visitor economy. The VEC will oversee the delivery of the DMP, coordinate activity, share insight and provide a unified voice for the sector. The Chair of the VEC will represent the visitor economy within wider governance structures, including the Place Leadership Board and the Devon and Torbay Business Advisory Group, ensuring alignment with broader economic and place-based priorities.

To support delivery, a series of **priority action groups** will be established, each focused on one of the DMP's key priorities. These groups will bring together businesses, stakeholders and delivery partners to co-design and implement actions. This approach will encourage collective ownership, improve coordination, and ensure that delivery is responsive to changing needs and opportunities.

The DMP will begin its delivery phase with an action planning session, bringing together key stakeholders and businesses to agree priorities, actions, and responsibilities. From this, a structured programme of delivery will be developed, supported by regular communication, engagement and partnership working across the destination.

Performance monitoring will be an integral part of the framework. Progress will be measured through a set of proportionate indicators linked to the DMP's objectives, including visitor activity and value, destination quality, business engagement, sustainability, and workforce development. These measures will be reviewed through the delivery plan and updated as required to reflect changing priorities.

Regular monitoring and reporting will support oversight and accountability. Action groups will meet periodically to review progress, address challenges, and update delivery activity. An annual report will be produced summarising achievements, challenges, and outcomes across each priority area. This will be reported through governance structures, including the Place Leadership Board, to ensure transparency, alignment and continued strategic oversight.

Overall, this delivery, governance and monitoring framework provides a structured and collaborative approach to implementing the DMP. It ensures that the strategic ambitions of the Plan are supported by clear actions, strong partnerships, and effective performance management, enabling Torbay to deliver a more coordinated, resilient, and high-quality visitor economy.

Appendix 5: Engagement and Consultation Summary

Engagement with businesses, stakeholders and partners was carried out to inform the development of this framework. This included one-to-one discussions, workshops, and an online survey, alongside feedback gathered from businesses on visitor experiences.

This engagement provided valuable insight into how the visitor economy is experienced in practice and identified key themes relating to perception, delivery, and future priorities.

Overall, feedback reinforced the importance of the visitor economy to Torbay, particularly in supporting local businesses, jobs, and the wider identity of the area. Businesses and stakeholders highlighted strong levels of pride in Torbay's natural environment, cultural assets, and tourism offer. However, engagement also identified a clear gap between these strengths and how they are consistently experienced or perceived.

Visitor feedback gathered through businesses and surveys highlighted a number of recurring themes. Positive feedback consistently focused on Torbay's coastline, scenery, attractions, and welcoming hospitality, with many visitors valuing the range of activities, affordability, and overall environment.

However, feedback also identified challenges in relation to the quality and consistency of the visitor experience. Key issues raised included:

- The condition and appearance of town centres and public spaces
- Perceptions of cleanliness and maintenance
- Concerns around antisocial behaviour and safety
- Limitations in retail, dining and wider visitor offer
- A need for improved signage, information, and transport
- A lack of year-round and family-friendly activities

From a business and stakeholder perspective, engagement highlighted a number of structural and delivery challenges. These included:

- A perception of fragmented governance and unclear leadership

- Limited coordination across organisations and initiatives
- Duplication of activity across multiple groups and plans
- A lack of clarity on roles, responsibilities, and ownership
- Challenges in accessing support, funding, and resources

Stakeholders consistently identified that the main barrier to progress was not a lack of ideas or opportunity, but the need for a more coordinated and effective approach to delivery.

The engagement process also identified a strong appetite for change. Businesses and partners supported a more collaborative, business-led model, with clearer leadership, improved communication, and a stronger shared vision for the destination. There was particular support for:

- A more coordinated approach to events and marketing
- Greater investment in place quality and visitor experience
- Strengthened use of data and insight
- Improved support for skills and workforce development
- A clearer and more consistent destination narrative

These findings have directly informed the approach set out in the DMP, including the focus on partnership working, clearer governance structures, and a more proactive, delivery-led model.

Appendix 6: Glossary and Definitions

For the purpose of this framework, the following terms are used in a broad and practical way.

- **Visitor economy:** The wider economic and social impacts linked to visitors, including tourism, hospitality, culture, and leisure.
- **Destination quality:** The overall quality of the place and visitor experience, including public spaces, services, accessibility, and perception of the area.
- **Year-round economy:** Activity that supports visitor demand across the whole year, reducing reliance on peak seasons.
- **Sustainable and inclusive growth:** Growth that protects assets, benefits communities and minimises negative environmental and social impacts.
- **Destination Management Plan (DMP):** A strategic framework setting out the vision, priorities, and delivery approach for Torbay as a destination and place.
- **Place-based approach:** A joined-up approach that considers economic, social, environmental, and cultural factors together.
- **Visitor Economy Cluster (VEC):** A business-led partnership coordinating delivery and collaboration across the visitor economy.
- **Visitor experience:** The overall quality of a visitor's journey, including attractions, services, infrastructure, and customer service.
- **Public realm:** Publicly accessible spaces such as streets, seafronts and town centres that shape the visitor experience.
- **Key Performance Indicators (KPIs):** Measures used to track progress, including visitor satisfaction, value, and engagement.

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Torbay Destination Management Plan Review BASELINE REPORT

Evidence Base

5th February 2026

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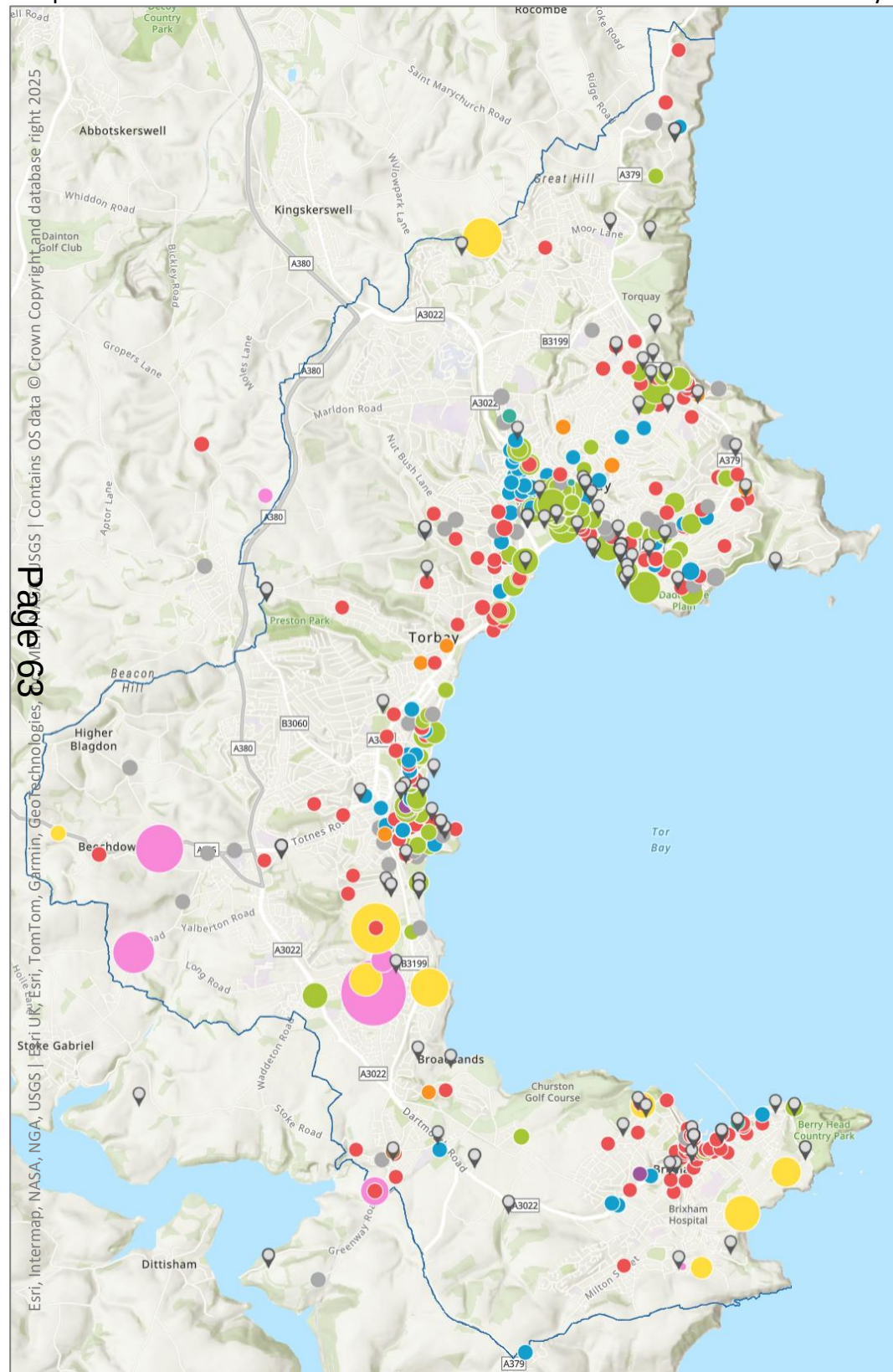
Notes:

- 1. Study Area – Torbay Unitary Authority
- 2. Data Sources: The data underpinning this review has been gathered from a range of sources and where secondary, those sources are given.
- 3. Image Sources: Maps and figures are Tomorrow’s Tourism Ltd, with sources referenced where applicable. Images are licenced from Shutterstock
- 4. This document is best viewed on a high resolution 27” monitor. When printed the document is A3 in size and is printed on Cocoon recycled paper. The polypropylene front cover is recyclable.
- 5. This document is an interim report prepared on behalf of Torbay Council. Tomorrow’s Tourism Ltd. will not be liable for any indirect or consequential loss or damage as a result of reliance on any of the insight set out in this document.

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Introduction & Approach

Map 1 – Distribution of Visitor Accommodation and Visitor Attractions in Torbay



1. This Baseline Report sets out the current state of play for the visitor economy in Torbay, drawing on a wide range of different sources and datasets to provide a snapshot of current performance and future potential.
2. The Report is part of the Discovery Stage relating to the development of a new Destination Management Plan for Torbay. Related work also includes an online survey for businesses and stakeholders, workshops and a number of in-depth interviews with key stakeholders. The development of the new Destination Management Plan will draw views from a wide range of partners and stakeholders to reflect a broad consensus and both elements of work can provide a firm foundations to build on for a successful future.
3. A variety of implications / findings are added in boxes in each Section and these key messages they are repeated as a Summary on the next page.

Outlook for 2026

4. Macroeconomic forecasts see a lack of UK private sector growth, with businesses weighed down by relatively high taxation, higher than average staff costs, high energy costs and a cautious visitor who typically has much less disposable income. Consumer confidence lags long-term norms with the GKF Index at -17 in November 2025, tracking at around this level over the two years since January 2024 and likely to continue throughout 2026 at this level. The unemployment rate is also likely to drift higher over the next year.
5. Inflation is likely to reduce slowly, but will remain above the 2% Bank of England target throughout 2026. Two or three reductions in interest rates are likely to see base rate falls to 3% by the end of 2026. This may help to unlock inward investment for those priority projects set out in the Torbay Story.
6. Running a business in the tourism economy in Torbay is likely to become less profitable in 2026 with increases in business rates for many from April, higher employment costs through the National Minimum Wage increases along with the decreased NICs threshold which has had a proportionately more severe effect on businesses that have lower paid or part-time staff. Funding for necessary investment by the public sector, such as on skills and training, may also be difficult to find given other statutory priorities.
7. Meanwhile, consumers will continue to watch their expenditure, which could mean shorter length of stay; replacing staying visits with day visits; or reducing expenditure while on holiday, for example by having fewer meals out, or opting for self-catering instead of serviced accommodation.

Implications for Torbay

- The challenging economic context will colour the first two years of any new Plan and should be taken account in the actions initially prioritised.

Summary and Key Findings

1. The visitor economy is likely to be subject to wider macro-economic headwinds and a low growth environment over the next two to three years. Increasing the quality of Torbay's overall offer, developing and working with strategically important visitor attractions as well as continuing to reshape and revitalise the accommodation offer, give Torbay a route to greater long-term profitability.
2. Measures that focus on converting current day visitors to become longer staying and repeat visitors can help transform the economic fortunes of Torbay. A focus on attracting more visitors from overseas can also reap dividends as is reported in Section 1.3 below.
3. The leisure market presents opportunities but it may be helpful to focus on no more than three specific markets over the next three years. It will be helpful to weigh the opportunity costs of focusing on inbound tourism against domestic markets.
4. The opportunity cost of prioritising business tourism should also be examined. Some potential exists for growth in meetings and conferences for Devon, but has Torbay got the right product or location to realise the potential?
5. Torbay should consider diversifying beyond peak-season leisure demand, capitalising on strong volumes relating to *Visting Friends & Relatives* for year-round demand. The growing 65+ demographic offers opportunities for traditional activities, while fewer visitors with children may weaken school-holiday demand. Long stays from study travel may boost shoulder and off-season demand; there is an unmet demand for dog-friendly accommodation.
6. When considering the accommodation offer, the long-term decline in accommodation stock seen across this century may now have reached its baseline. While there is still likely to be some accommodation that is not aligned to market needs, there is an opportunity to continue to reshape the offer through planning policy and to prioritise public resources to facilitate and encourage new hotel investment.
7. The current DMP is being delivered successfully but the actions have not moved the dial in the way that will promote change and growth. Part of this is the unhelpful economic context, some of it is likely to be about inadequate resources, another issue may be the way in which the partners should best organise themselves to drive change and progress a complex and multi-layered policy area.
8. Given some slippage over recent years, improving visitor satisfaction and quality, particularly regarding cleanliness, safety, public realm, and legal compliance, should be raised up the agenda.
9. Developing in-house expertise in tourism statistics can help to turn data from the Data Hub into useful insight. Current statistics may underrepresent the situation; the DMP can also acknowledge the scale of the Sharing Economy and involve these operators in future planning and development.
10. Preparing for upcoming policy changes, in particular the Statutory Registration Scheme and potential visitor levies via the Devon & Torbay Combined County Authority, can both be strategic game-changers for Torbay.
11. The Destination Management Group (DMG) should consider the prioritisation of product development activity over the next 2 to 3 years. Successful events, like the Bay of Lights, highlight the importance of extending the tourism season; a study to identify two or three new events is recommended.
12. Enhancing the range and quality of visitor experiences could be a growth option, as offerings are less developed compared to other destinations. Consider working with the strategically important visitor attractions to develop the Geopark-related offer.
13. Diversify and support the accommodation sector by promoting high-quality standards, sustainable practices and off-season usage. Continue converting older stock to residential use; consider increasing bedspace reduction targets to better manage accommodation supply. A targeted programme to support high-aspiration accommodation providers could drive growth and quality.
14. Extending the tourist season will help create year-round jobs and strong collaborations with educational institutions will be central to address workforce challenges.
15. The DMG might consider assigning visitor economy actions to specific groups, such as those focused on resort quality or sustainability. Establishing a new system of governance will help drive the delivery of specific initiatives that link product development with targeted marketing campaigns to maximise benefits. Focussing on a few actions is likely to be more effective than spreading efforts too thinly.



Shutterstock (2025) Agatha Christie Statue, The Strand, Torquay, #2643825401

1. Visitor Economy Performance & Market Context

1.1 Visitor Volumes, Value & Impact – Domestic

2006-2019

Figure 1. Volume - Overnight Trips (000)

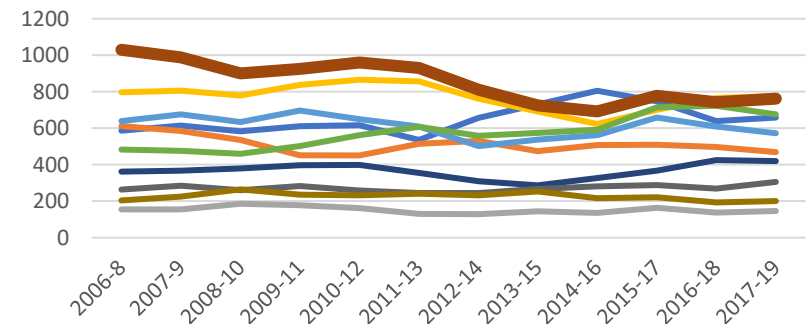


Figure 2. Nights (m)

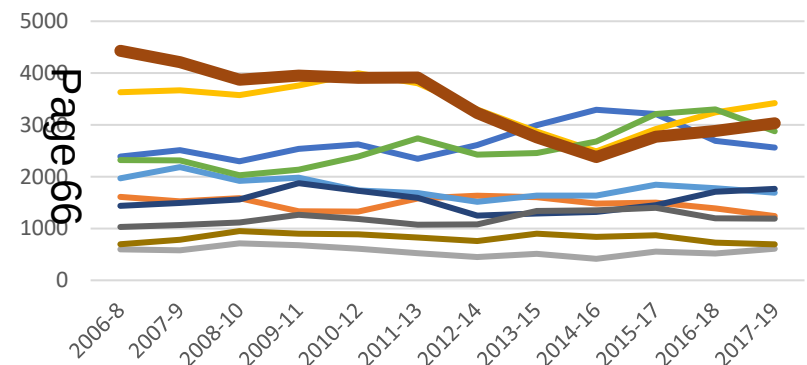
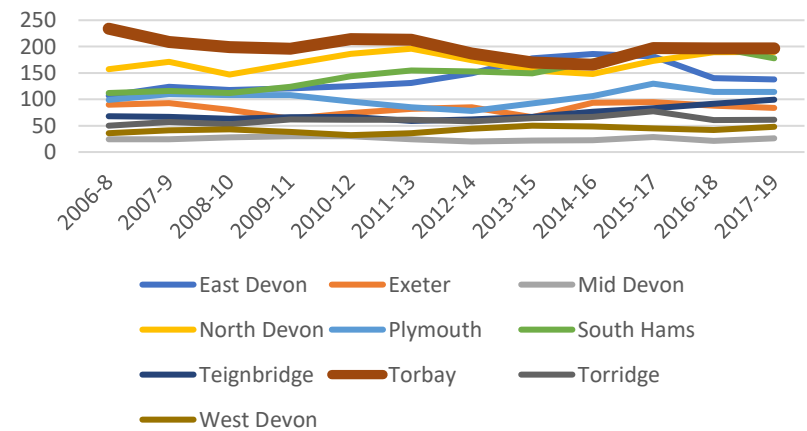


Figure 3. Overnight Spend (£m)



2021-2023 Annual Average

Figure 4. Volume (m)

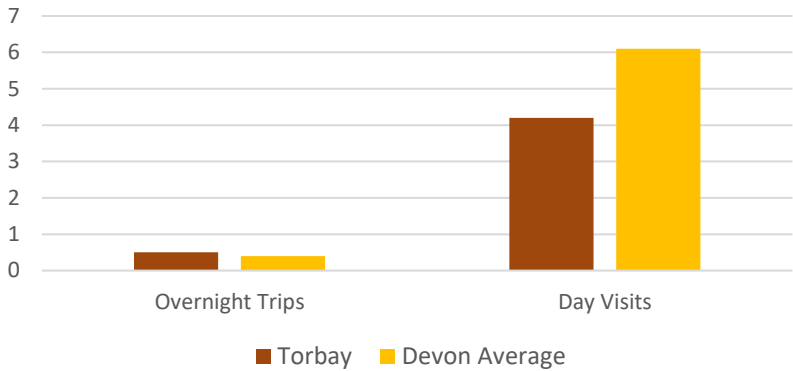


Figure 5. Nights (m)

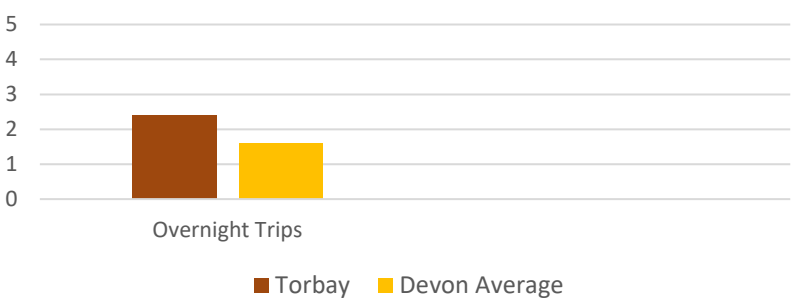
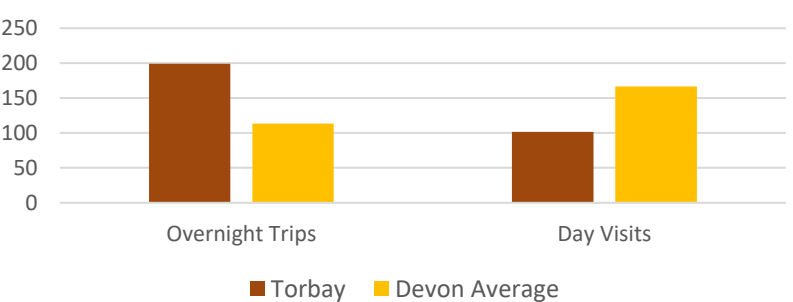


Figure 6. Spend (£m)



1. Torbay plays a major role in Devon’s domestic tourism economy, outperforming the average of the other Devon districts (“Devon Average”) across all core indicators of trips, nights and spend. While overnight visitors continue to deliver higher economic impact overall, day visits remain a vital component of Torbay’s total visitor spend and footfall.

Pre-pandemic trends (2006–2019)

2. Torbay consistently recorded significantly higher visitor volumes, nights and spend than the Devon average. Over this period, trips gradually declined from just over 1 million in 2006 to around 0.75–0.8 million by 2019, with similar patterns observed in nights and spend. Despite this, Torbay maintained a clear lead over the Devon average throughout.^{1,2}

Post-pandemic performance (2021–2023)

3. Torbay attracted around 1 million domestic trips between April 2021 and March 2023, compared with a Devon district average of 0.7 million. 4.8 million visitor nights were recorded in Torbay, well above the Devon district average of 3.1 million, highlighting Torbay’s continued strength as a longer-stay destination.³

4. Domestic overnight spend totalled £398 million over the 24-month period, significantly higher than the Devon district average of £277 million.

Day Visits

5. Torbay recorded 8.3 million day visits, which is below the Devon district average of 12.3 million, reflecting the county’s larger rural catchment and wider dispersal of trips. However, day visitors to Torbay generated a substantial £203 million in spend, underlining the importance of the day visitor market to the local economy, even though this remains lower than the Devon average of £333 million.³

1. Source: Visit England, GBTS 2006-2019.
2. Source: Visit England, GBTS 2021-2023. Due to small sample sizes and a shorter data collection period following COVID-19, this dataset was displayed as 24 months worth of data (Apr 2021 - Mar 2023). The charts are displayed as annual averages to provide easier read-across from the pre-COVID charts.
3. Notes on data: Due to changes in the data processing approach, the 2021-23 data is not directly comparable to previous data. Please note that all 2014-2016 averages have been calculated from original data and no re-weighting has taken place. Spend graph is not in real terms so inflation has gradually pushed up amounts. It is important to note that figures up to 2019 are not directly comparable with those from 2021 onwards due to changes in survey methodology and a lack of data for 2020–2021. The two periods should therefore be interpreted as separate time series.

1.1 Visitor Volumes, Value & Impact – Domestic

Torbay vs other Devon Districts

1. With an average spend per trip of £384 and £83 per night, Torbay ranks among Devon’s stronger performing districts. The average length of stay of 4.6 nights is above the county average and notably higher than more urban destinations such as Exeter and Plymouth.
2. Spend per day visit (£24.42) sits below the Devon average (£27.15) and ranks seventh out of the eight districts listed in Table 1. This indicates that while successful in attracting visitors, Torbay is not currently maximising the economic return from each trip.
3. The data highlights a strategic imperative to shift focus from purely driving visitor numbers towards increasing the value of each visit.

Table 1. Domestic Overnight and Day Visits by District 2021-2023¹

District	Spend per Night	Spend per Trip	Average Nights	Spend per Day Visit
East Devon	£64	£282	4.4	£24.11
Exeter	£54	£162	3.0	£31.68
Mid Devon	£77	£251	3.3	-
North Devon	£56	£314	5.6	£26.12
Plymouth	£86	£255	3.0	£27.97
South Hams	£76	£302	4.0	£35.53
Teignbridge	£56	£217	3.8	£19.24
Torbay	£83	£384	4.6	£24.42
West Devon	£83	£383	4.6	£34.04

Devon

1. Overnight trips generated 3.8m visits, delivering £1.19bn and 12.5m bed nights, highlighting their central role in overall visitor value. ⁵
2. Holiday trips dominate the overnight market, accounting for nearly half of trips (1.8m) but over half of spend (£639.7m) and bed nights (7.1m), underlining their higher economic yield and longer stays.
3. Visiting friends and relatives (VFR) represents a significant secondary segment (1.2m trips; £242.2m), contributing meaningful volume but lower spend per trip than holidays.
4. Business tourism is minimal at 2% of trips and 1% of value (0.1m trips; £14.7m), confirming Devon’s limited reliance on corporate tourism. Domestic stays as part of outbound travel and miscellaneous trips are smaller but together add over £296m, indicating some diversification beyond core leisure demand.
5. Day visits are high volume (21.3m) and deliver substantial value (£1.09bn), almost matching overnight spend. This underlines the importance of short-stay and local/regional visitors to Devon’s economy, though with lower spend per visit compared to overnight stays.
6. The data reinforces Devon’s strong dependence on leisure-led tourism, particularly holidays and day visits, with clear opportunities to focus on extending stays, converting day visits into overnight trips, and increasing spend within the VFR market.

Implications for Torbay

- The opportunity cost of activity relating to Business Tourism should be considered as the market is relatively small and the Torbay product may not be as competitive as other Devon destinations
- The leisure market is broad based and extensive and more work to understand and prioritise key growth segments is likely to be important for future success.

Figure 7. Volume (m) of Visits to Devon 2024

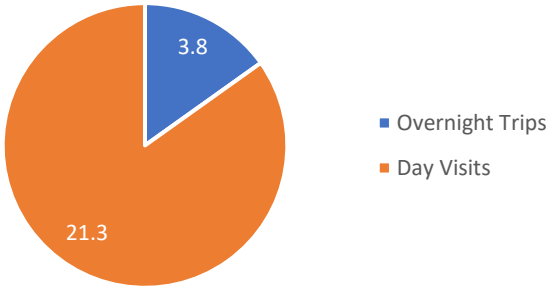


Figure 8. Value (£m) of Visits to Devon 2024

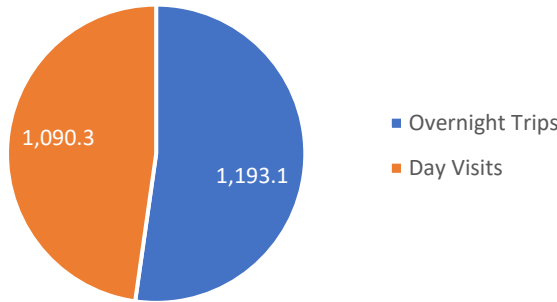
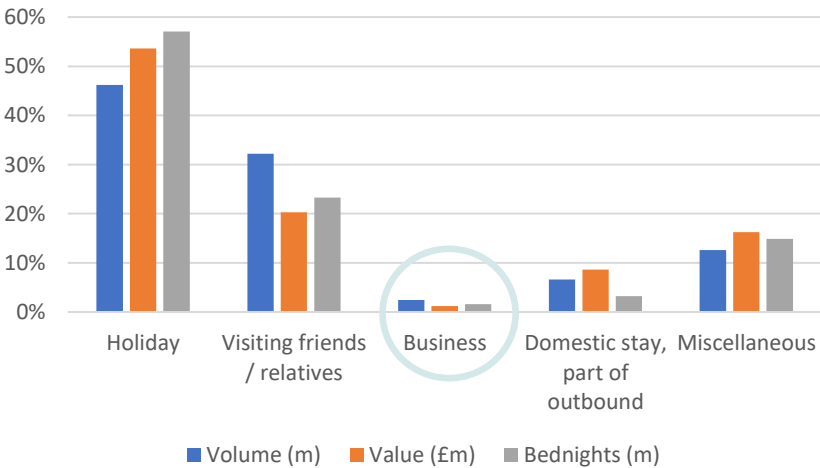


Figure 9. Domestic Overnight Trips by Purpose to Devon 2024



1. Source: Visit England, GBTS.
2. Note from VE: Due to small base sizes by local authority, the tables include 24 months worth of data (Apr 2021 - Mar 2023).
3. Source: GBDVS 3HR+¹ (3 hour+ Leisure Day Visits, the broadest definition of leisure day visits)
4. Torridge has been omitted from the table due to insufficient base size. Mid Devon Day visit data has been omitted for the same reason.
5. Source: GBTS 2024, <https://www.visitbritain.org/research-insights/domestic-tourism-latest-results#view-and-analyse-data>

1.2 Visitor Volumes, Value & Impact – Visitor Origin

South West Visitor Economy Hub

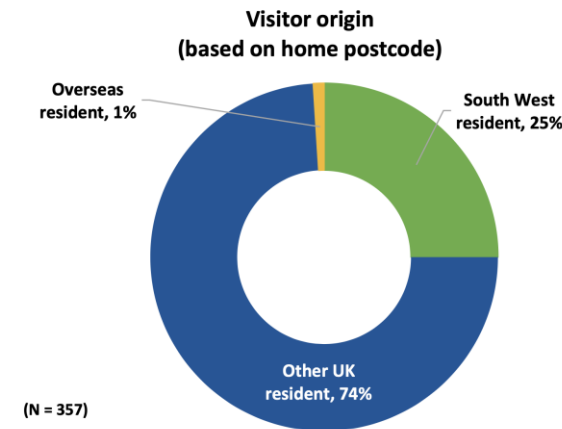
- 1. The South West Visitor Economy Hub report for Q3 2025 highlights the West Midlands as the largest share of visitors to the English Riviera outside the South West region at 25%. The South East and East Midlands also provide a significant source of visitors. These markets are stable compared with the same period in 2024 ¹
- 2. Within the South West, Plymouth, Somerset and Cornwall are notable source markets.

ERBID Visitor Survey 2025

- 3. The English Riviera Visitor Survey shows a stable pattern of visitor origin, with no significant change compared to the 2022 survey, although the respondent base does differ significantly from the Data Hub in terms of origin.
- 4. The vast majority of survey respondents come from within the UK, accounting for 99% of all respondents (N=357), while overseas visitors represent just 1%. UK visitors from outside the South West dominate the profile, making up nearly three-quarters of all respondents (74%). A further 25% originate from within the South West region.
- 5. In terms of specific origins, Bristol and Birmingham are the single largest postcode areas, each contributing 6% of visitors. This is followed by Sheffield and Exeter (4% each), with a wide spread of other urban centres such as Plymouth, Dudley, Nottingham, Leicester and Gloucester each contributing around 3%. ²

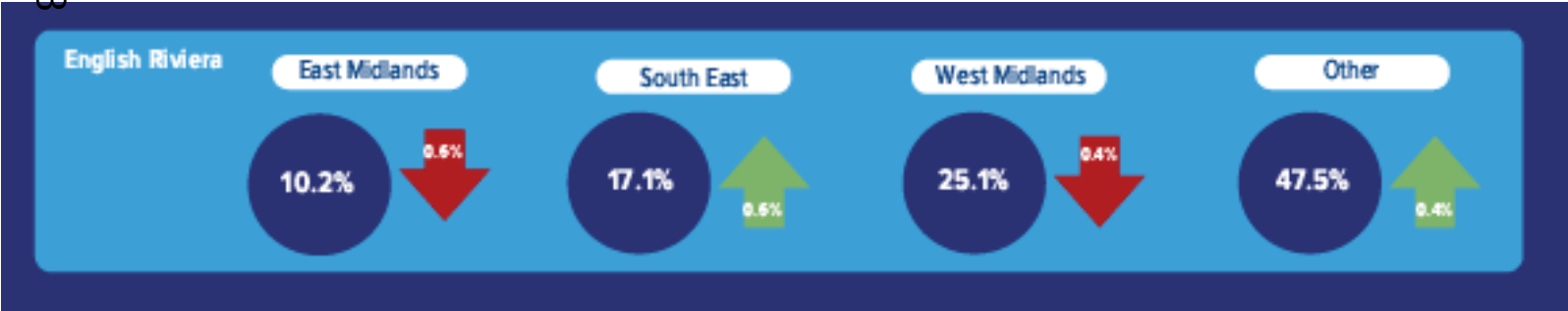
Figure 12. Visitor Origin from 2024 Visitor Survey ²

There was no change in the visitor origin compared with the 2022 survey.



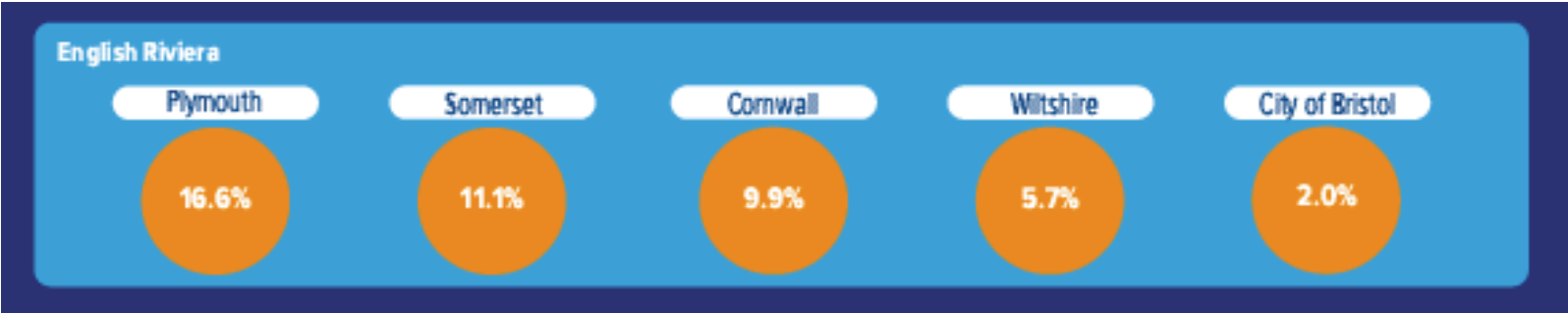
Postal area origin		% of 2024 visitors	Postal area origin		% of 2024 visitors
BS	Bristol	6%	ST	Stoke-On-Trent	3%
B	Birmingham	6%	CF	Cardiff	2%
S	Sheffield	4%	WR	Worcester	2%
EX	Exeter	4%	CV	Coventry	2%
PL	Plymouth	3%	OX	Oxford	2%
DY	Dudley	3%	RG	Reading	2%
NG	Nottingham	3%	BB	Blackburn	2%
LE	Leicester	3%	NN	Northampton	2%
GL	Gloucester	3%	SN	Swindon	2%
NP	Newport	3%			

Figure 10. Footfall Origin of Visitors to Torbay Q3 2025 - UK Regions ¹



Arrows show percentage change. Figures are benchmarked against same quarter in 2024

Figure 11. Footfall Origin of Visitors to Torbay Q3 2025 – South West



1. Source: Visitor Economy Report for English Riviera QUARTER 3 2025 Devon July - September 2025

2. Source: The English Riviera Visitor Survey 2024 Final Report Produced for and on behalf of The English Riviera BID Company by The South West Research Company Ltd. March 2025

Implications for Torbay

- Developing Inhouse resource and expertise in tourism statistics and insight would be beneficial to ensure regular reports are more consistent and well connected.
- Such a resource will then better interrogate and utilise existing datasets provided by the Datahub and other source and identify new research requirements.
- The accuracy of origin data presented on this page can be questioned on the basis of sample sizes – a fuller analysis of the BT mobile phone data held on the Datahub is advised.

1.3 Visitor Volumes, Value & Impact – International / Inbound

Figure 13. Inbound Visits (000)

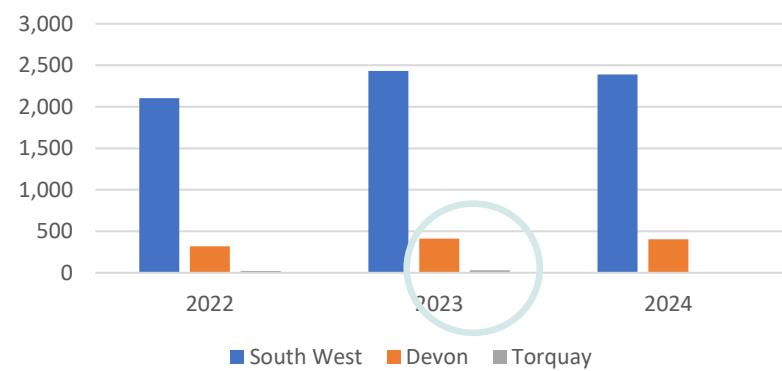


Figure 14. Inbound Nights (000)



Figure 15. Inbound Spend (£m)



1. Demand in the South West softened slightly in 2024 after a strong 2023, with visits down marginally but nominal spend continuing to grow, indicating higher value per trip.
2. Devon broadly followed this pattern for visits (slight dip vs 2023) but outperformed the wider region on nights and spend. Nights in Devon continued to rise in 2024, contrasting with a decline across the South West, suggesting longer stays. Spend growth in Devon was also strong, increasing again in 2024 and at a faster rate than visits, pointing to higher daily expenditure but note this is not adjusted for inflation.
3. Devon accounts for 17% of South West visits, underlining its importance to the regional visitor economy. Torquay represents 7.3% of Devon's inbound visitor market, a small but still significant contribution within the county.

Purpose of Visit

4. Holidays are important for Devon but account for a smaller share of visits, nights and spend than in the wider South West, indicating a more diversified visitor economy.
5. Visiting friends and relatives (VFR) is the largest market, providing consistent, year-round demand and supporting overall visit and night volumes.
6. Business and study trips generate a disproportionately high share of nights and spend, highlighting their importance for higher value, longer stays and reduced seasonality.

Implications for Torbay – Inbound Visitors

- Inbound visits to Torbay are marginal in numbers terms (see Figure 13 and the opportunity cost of inbound activity needs to be considered against a focus on domestic markets.
- Holiday trips form a smaller share of the Devon market, so Torbay should not depend solely on peak-season leisure demand.
- Strong VFR volumes support year-round demand, but typically generate lower (accommodation) spend, requiring a stronger offer and experiences to increase value.
- Higher business spend in Devon, when compared with the SW, suggests scope to grow meetings, conferences and corporate but the base is low and a focus on leisure is likely to drive profitability.
- Study travel delivers long stays and high spend in Devon, offering Torbay opportunities to support shoulder-season and off-season demand.

Figure 16. Purpose of Inbound Visits 2024
% of Visits

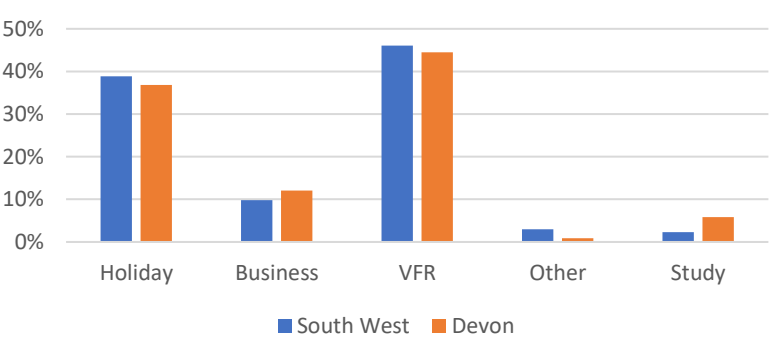


Figure 17. Purpose of Inbound Visits 2024
% of Nights

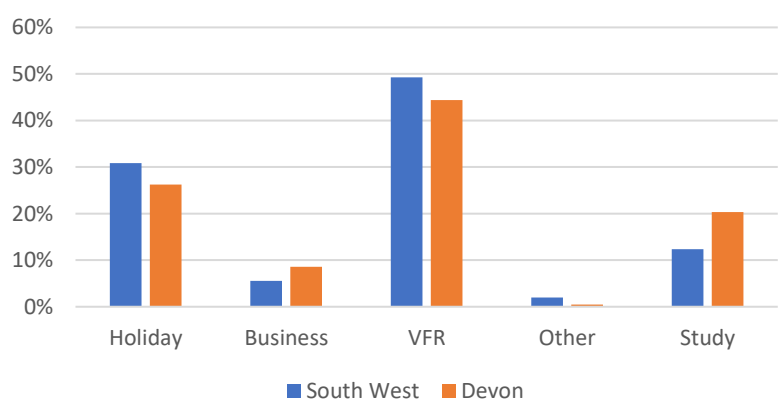


Figure 18. Purpose of Inbound Visits 2024
% of Spend



1. Source: International Passenger Survey (IPS)

1.3 Visitor Volumes, Value & Impact – International / Inbound

Torbay Markets for Short-term Lets

- Page 70
1. The ONS short-term lets dataset (Table 2) provides a valuable insight into the nationalities of international visitors choosing commercial self-catered accommodation (through Airbnb, Booking.com and Expedia Group) in Torbay. Analysing the top 25 inbound markets reveals a clear picture of Torbay's core overseas demand.
 2. The data indicates a strong dependence on principal European markets. Germany is the dominant source country, accounting for 28% of all sampled international visitors in this accommodation segment. This is followed by the Netherlands (11%), forming a significant bloc of North European demand.
 3. Together with France, Switzerland/Liechtenstein, Denmark, Belgium and Austria, EU nations constitute the overwhelming majority of inbound visitors staying in short-term lets.
 4. Beyond Europe, Torbay attracts meaningful visitation from key English-speaking long-haul markets, namely Australia (7%), the United States (7%), and Canada (2%). There is also emerging but smaller-scale demand from other global regions, including "Asia other" (5%), and individual countries like Brazil, China, and South Africa. This demonstrates a diversified, albeit Europe-centric, international appeal.

Table 3. Top Ten Inbound Markets to Devon 2022²

Market	Visits (000)	Nights (000)	Spend (£m)
1. Germany	41	247	18
2. USA	40	358	31
3. Netherlands	36	180	11
4. France	24	156	10
5. Ireland	18	80	7
6. Australia	17	169	12
7. Poland	13	67	2
8. Canada	15	119	5
9. Spain	14	226	6
10. Switzerland	11	79	6

Devon Markets

5. The data in Table 3 shows that Devon's top international markets in 2022 were dominated by European visitors, although the USA stands out as the highest-spending market despite only being the second-largest by visit numbers.
6. Germany generated the most visits overall (41,000) and a substantial 247,000 nights, reflecting strong interest and relatively long stays. The USA contributed a similar number of visits (40,000) but far more nights (358,000), resulting in by far the highest total spend (£31m), indicating higher-value, longer-haul travel.
7. The Netherlands and France followed as reliable mid-sized markets, each providing steady volumes of visits and spend. Australia, though only sixth in visit numbers, produced 169,000 nights in Devon —one of the highest averages— suggesting very long stays typical of long-haul travellers.
8. Poland and Canada generated modest spend relative to visit volume, while Spain produced a surprisingly high number of nights (226,000) despite ranking ninth in visits.

Implications for Torbay - Inbound Visitors

- Given that the top source markets in table 2 (Germany, Netherlands, Australia, France, USA, Ireland, and Switzerland / Liechtenstein) account for two thirds of inbound demand, targeted marketing efforts towards a small number of these key markets is likely to yield higher returns than a less-selective approach.
- Collaboration through the South West Group and VisitBritain would provide a cost-effective channel for this targeted promotion, leveraging regional and national tourism networks to reinforce Torbay's appeal to these proven audiences.
- It could be more productive to focus on a maximum of three inbound leisure markets over a three-year programme period with significant budgets that leverage other partnership income.

Table 2. Top 25 Inbound Visitors to Torbay 2024¹

Country	%
Germany	28%
Netherlands	11%
Australia	7%
France	7%
United States	7%
Switzerland and Liechtenstein	7%
Asia other	5%
Denmark	3%
Ireland	3%
Canada	2%
Belgium	2%
Spain	2%
Norway	2%
Austria	1%
Oceania other	1%
Czechia	1%
Poland	1%
Italy	1%
Europe other	1%
Sweden	1%
Missing	1%
South Africa	1%
Brazil	1%
Central and South America other	1%
China	1%

1. Source: Office for National Statistics, International Passenger Survey 2024
<https://www.ons.gov.uk/peoplepopulationandcommunity/housing/bulletins/shorttermletsthroughonlinecollaborativeeconomyplatformsuk/januarytodecember2024>

2. Source: Office for National Statistics, International Passenger Survey, Subregion Trend by Purpose 2009-2022. Data at County level is only available up to 2022. IPS data for 2024 and 2025 is under review
<https://www.visitbritain.org/research-insights/inbound-visits-and-spend-quarterly-uk>

1.4 Market Segments

- Page 71
1. Torbay’s visitor base is ageing, potentially at a faster rate than the wider population. Torbay currently lacks a sufficient offer to attract younger visitors; even with new development, competition from alternative destinations may limit impact without a distinct and compelling proposition and greater level of focus on investment in the place.
 2. The most recent data from the South West Visitor Economy Hub indicates that visitors to the English Riviera in Q3 2025 were predominantly aged 35–64, accounting for the largest share of all visitors. The 65+ age group (22%) was the only demographic to record growth, increasing by 1.4% during the period.¹ Demographic trends will ensure this growth continues – and this is likely to include / attract active early retired independent travellers with cultural and sporting interests. Further work to fully understand this market and its potential is likely to be important as part of the new DMP.
 3. All age groups under 55 years experienced a decline in visitor share, with particularly low representation from 18 to 24-year-olds (3%).
 4. Over 11% of visitors to the English Riviera reported an accessibility requirement, a higher proportion than in either Exeter and Plymouth. There is a growth opportunity for Torbay to take greater advantage of the ‘Purple Pound’, given that nationally 20.8m overnight trips were taken by those with an impairment in 2024, and this segment spend more and stay longer. A focus on inclusion of many different visitor types can help Torbay continue to be a welcoming place for all visitors.
 5. Visitors travelling with children represented 17% of the market, below levels seen in Exeter and Plymouth. The majority of visitors (74%) travelled without children, in line with other Devon destinations.
 6. 16.% of visitors brought a dog on an overnight stay to the English Riviera. A further 5% indicated they would have travelled with a dog if suitable accommodation had been available. Demand for dog-friendly accommodation is lower than in North and South Devon but represents an opportunity for growth.

1. Source: South West Visitor Economy Hub, 2025, Visitor Economy Report for English Riviera – Quarter 3 2025, July - September 2025
2. Sources: English Riviera Destination Management Plan 2022-2030; English Riviera BID Destination Marketing Strategy 2024

Table 4. Assessment of Current Target Markets

Current Target Market	Source	Fit with 2025 Visitor Trends	Comments / Implications
Families (Fun by the Sea)	DMP, MS	Weak	Only 17.1% of visitors have dependent children—lower than Devon average. Family-focused attractions may need extra promotion or adaptation to maintain this segment.
Young Actives	DMP, MS	Weak	Decline in 18–34 visitors suggests reduced engagement. Torbay may need refreshed experiences or targeted campaigns to attract younger adults.
Cultural Explorers (incl. empty nesters)	DMP, MS	Strong	The growing 65+ and accessibility-focused visitors align well with this market. Traditional seaside, heritage, and cultural attractions fit these preferences. A growth market.
Business Tourism	DMP, MS	Weak	Current volume and value of business tourism is too small to be a priority market. Defined as longer-term priority in DMP.
Solo Travellers	MS	Moderate	Older adults and flexible travellers may include solo visitors; potential to develop solo-friendly packages or experiences. Marginal in terms of volume.
Groups – UK, international, educational	MS	Neutral	Data doesn’t directly reflect group trends, but dog-friendly and accessible experiences could appeal to certain UK group segments.
Independent International Travellers	MS	Neutral	Current market is very modest – marketing may be at disproportionate cost to revenues.
Cruise Ships	MS	Neutral	Data not currently captured, but older demographics may support shore excursions and day visits. Marginal impact with potential issues of visitor management depending on timings.

DMP = Destination Management Plan; MS = Marketing Strategy 2024

1. Table 4 right assesses the target market segments in the current DMP and in the 2024 Marketing Strategy (MS) against the market data and trends.²

Implications for Torbay – Market Segments

- The growing 65+ market strengthens demand for traditional seaside, cultural, heritage and low-impact activities. Older visitors are more flexible, supporting off-peak and shoulder-season growth if targeted appropriately.
- Despite the 11% of share, the accessible market still represents an unrealised opportunity given that it makes up around a fifth of all visits.
- Fewer visitors with dependent children reduces pressure on family-centric attractions but risks weaker school-holiday demand unless actively addressed.
- Unmet demand for dog-friendly accommodation presents a relatively quick win for extending stays and boosting spend.
- Promotion should increasingly emphasise comfort, ease, wellbeing, scenery and value, while selectively developing offers to rebalance younger and family segments if desired.
- Current origin analysis adds limited insight; access to raw BT data reported by the Datahub is needed to understand travel patterns beyond the expected proximity effect.

1.5 Seasonal Profile of Domestic Visits to Devon

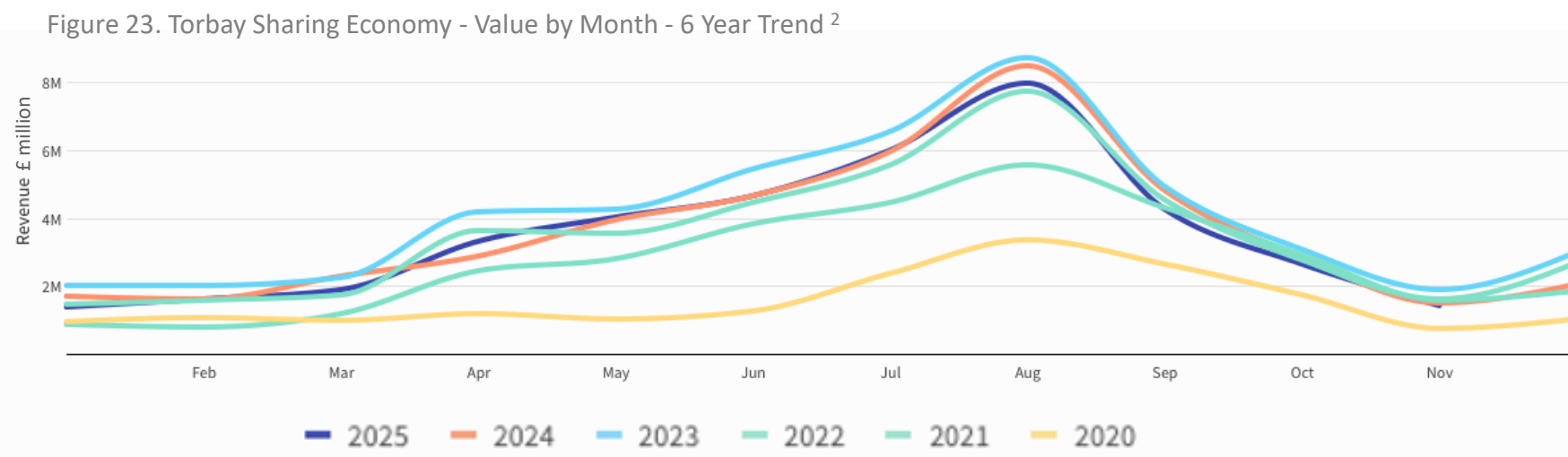
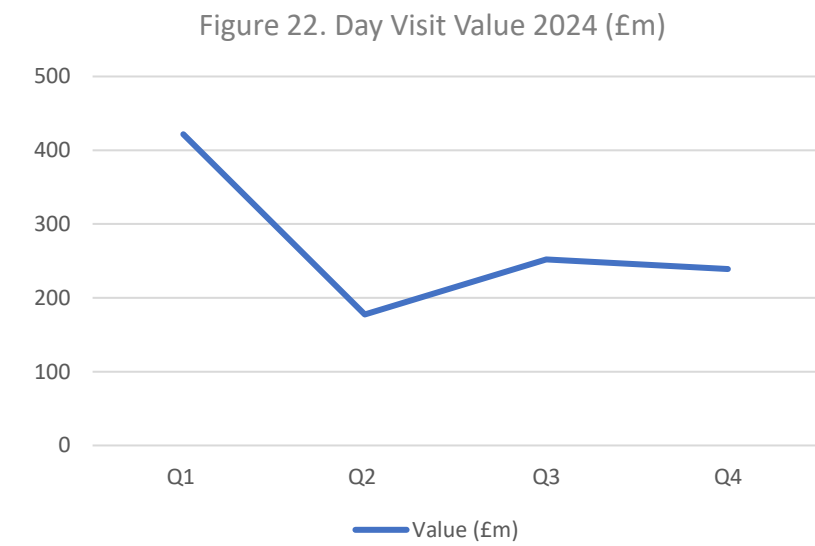
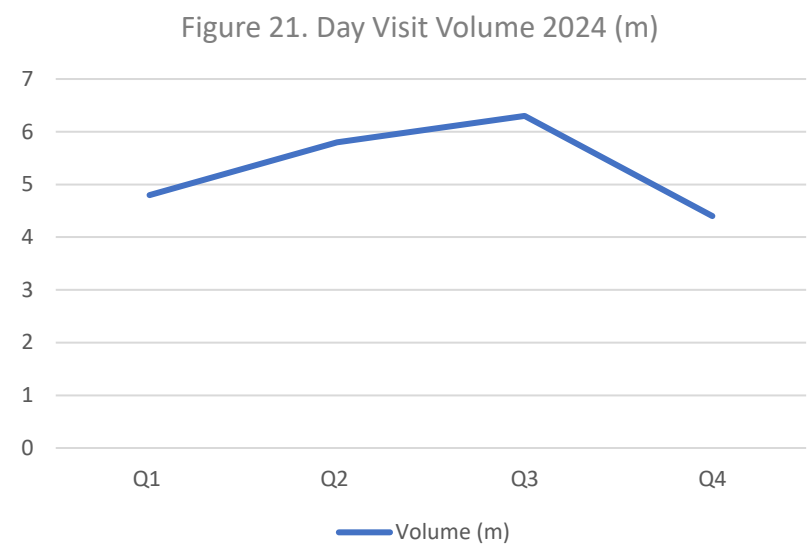
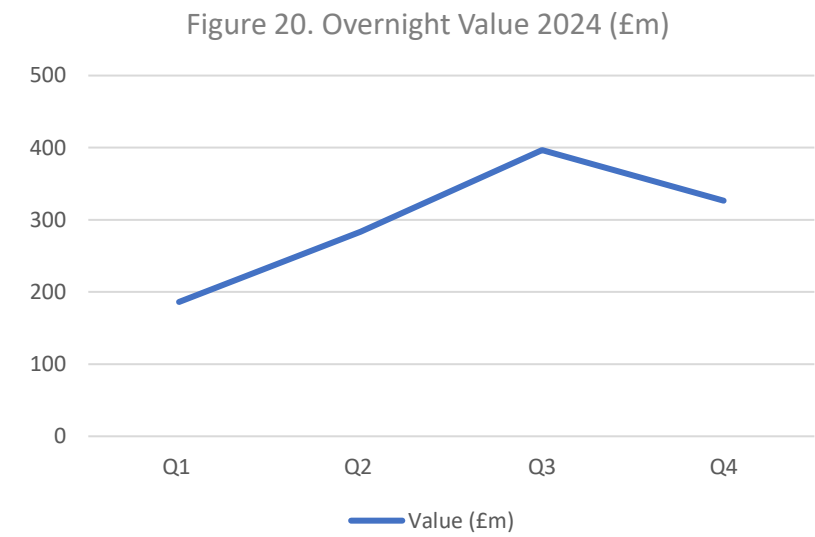
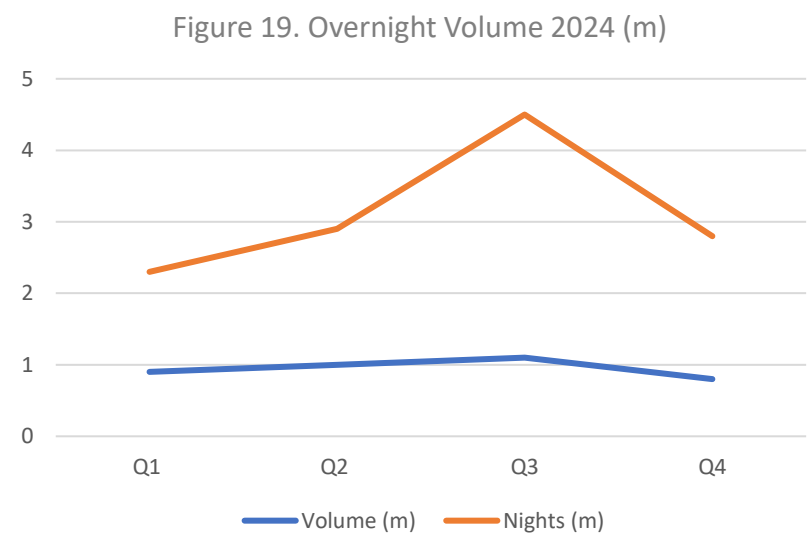
- Page 72
- Domestic tourism activity in 2024 shows a clear seasonal pattern across both overnight trips and day visits to Devon. ¹
 - Overnight trips increased steadily from Q1 to Q3 before declining in Q4. Trip volume rose from 0.9 million in Q1 to a peak of 1.1 million in Q3, reflecting stronger summer demand. This trend is mirrored in visitor spending, which increased substantially from £186.2m in Q1 to £396.7m in Q3, alongside a rise in bed nights from 2.3 million to 4.5 million. The Q4 slowdown saw volume fall to 0.8 million and spend reduce to £326.5m, indicating the impact of seasonality despite relatively strong end-of-year value.
 - Day visits followed a similar seasonal trajectory, with volumes climbing from 4.8 million in Q1 to 6.3 million in Q3, before dropping to 4.4 million in Q4. However, spending patterns differed: Q1 recorded the highest day-visit value (£421.7m), suggesting higher spend per visit early in the year. Spend then fell sharply in Q2 (£177.5m) before partially recovering in Q3 (£252.2m) and Q4 (£238.9m).
 - The data highlights Q3 as the peak period for domestic tourism activity, particularly for overnight trips, while spend per visit varies significantly by quarter, especially for day visitors. These trends reinforce the importance of seasonality in shaping both visitor volumes and economic impact.

Implications for Torbay

- Stand-out events that extend the season are already making a difference - such as the Bay of Lights. It would be helpful to undertake feasibility to assess options that can attract new audiences with a view to developing one or two further events of national importance during the next DMP period.
- A season extension plan could identify accommodation types, such as high-quality self-catering and boutique hotels, that are less susceptible to seasonal trends.

1. Source: VisitEngland <https://www.visitbritain.org/research-insights/domestic-tourism-latest-results#view-and-analyse-data>. Note: data only available for 2024.

2. Source AirDNA – short term lets revenues by month : includes international visitors - see slides 20 – 23 for details.



1.6 Market Trends

Consumer Confidence

- Page 73
1. UK consumer confidence showed a modest improvement in October 2025, rising for the first time since May, according to YouGov. The increase was mainly driven by stronger perceptions of household finances, both looking back over the previous month and ahead to the coming year.¹
 2. This suggests that, while many households remain under pressure from the cost of living, there are some early signs that financial anxiety may be easing slightly. However, broader economic confidence remains fragile, with continued uncertainty around house prices and business activity.²
 3. This cautiously improving sentiment has important implications for domestic travel. When people feel more secure about their finances, they are generally more willing to spend on discretionary items such as holidays and short breaks.
 4. In the current climate, UK-based trips continue to be viewed as a more affordable and lower-risk option compared with overseas travel. Even during periods of weaker confidence, many households have continued to prioritise short domestic breaks, suggesting that staycations remain a resilient part of consumer spending.
 5. That said, rising everyday costs still limit how much many people can spend on leisure. As a result, the uplift in confidence is likely to translate more into demand for shorter, lower-cost domestic trips rather than expensive or longer holidays. Overall, the recent improvement in consumer confidence points to steady but cautious growth in domestic travel, rather than a rapid rebound.
 6. Torbay is well placed to benefit from domestic staycations and short breaks. Late booking, flexible cancellation, and self-catering will continue to dominate booking behaviour. Peak summer seasons should remain strong, but shoulder and off-season demand will require active stimulation. E.g. through events and promotions but also making it easier to buy and change domestic trips.

1. Source: YouGov, October 2025: Consumer confidence rises for the first time since May (published 24 November 2025) [link](#)
2. Source: UK Parliament, House of Commons Library, Research Briefing - Business and consumer confidence: Economic indicators (Published 21 November 2025) [link](#)
3. Mintel, 2024, Hotels UK; Mintel, 2023, Holiday Rentals UK
4. Source: YouGov, 2025, Great Britain international traveller outlook 2026
5. VisitEngland, Domestic tourism: Q3 2025
6. Tourism Economics (2025) Global Travel: Key Themes for 2026 Dave Goodger and Helen McDermott December 2025



Accommodation Trends

7. Domestic tourism remains price-sensitive, with strong growth in holiday rentals driven by affordability, privacy, and self-catering.
8. Hotels face ongoing pressure from short-term lets and cost-of-living impacts, with demand focused on quality, flexibility, and online booking.
9. Interest is growing in glamping, camping, wellness breaks, and off-peak stays, particularly among families and younger visitors.
10. The over-65 market is growing but underused, with accessibility and service levels key barriers.³
11. Torbay’s visitor economy is likely to remain increasingly driven by self-catering and experience-led stays, with proximity to attractions a critical factor in choice. There is strong potential for diversification, shoulder-season growth, and managing the impact of short-term lets to sustain competitiveness.

Domestic Tourism Trends

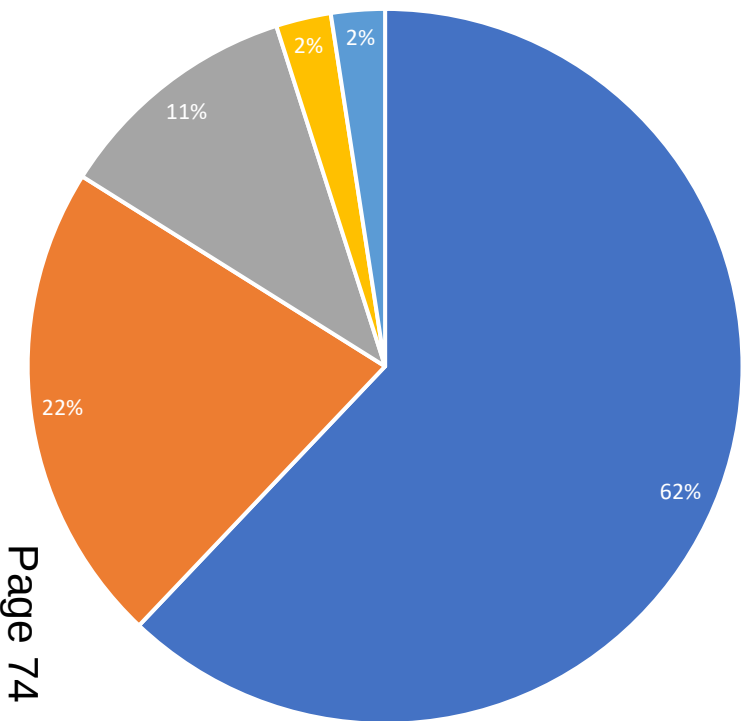
12. The volume of domestic overnight trips in England showed a minor decline from 2024 to 2025.
13. In terms of destination type, ‘large towns or cities’ increased their share of overnight trips in Q3 2025 vs the previous three years, while “seaside” declined.
14. Regionally, the South West’s share of overnight trips shows a declining trend for Q3 over the past 4 years (20% in 2022 and 2023, 18% in 2024, 16% in 2025).⁵
15. Despite economic headwinds, travel demand remains resilient with consumers prioritising expenditure on travel over other goods and services. Consumers however will likely need to prioritise the number of trips but the 40% identified by the You Gov survey that may shift trips to domestic destinations is an opportunity for Torbay.
16. Value for money remains highly important with 92% of consumers looking for better value, more discounts and special offers in Q3 2025 up from 83% in Q3 2024. New experiences are also being prioritised, over iconic and affordable destinations across all generations.⁶

Implications for Torbay

- Market trends and the wider economic context over the next two years means that value for money will become more important. Both the accommodation and attractions offer needs to have value at its core as well as being of high quality. This represents an opportunity for Torbay and a business support programme to encourage value-led offers would help cement a revitalised proposition.
- The product is likely to need upgrading and to move with the times – whether that is via private sector-led enterprise and investment or underpinning improvements from the public sector. It could be helpful to use what is likely to be a difficult trading period over the next 2 to 3 years to identify and develop key elements of the product that can be ready for growth when it comes.
- This could include the development of further specific ‘visitable’ Geopark assets, within the UNESCO designation which covers all of Torbay together with Agatha Christie experiences, Paignton Zoo and those other strategically important visitor attractions identified on Page 25.

1.7 Employment

Figure 24. Torbay Direct Visitor Economy Employment 2024



- Accommodation
- Catering
- Attractions/entertainment
- Retailing
- Transport

1. Annex I shows total direct employment in the tourism economy as defined by the ONS. This does not include employment in the sharing economy as shown on page 22 (e.g. often non-serviced accommodation) so understates the overall impact.
2. Jobs are heavily concentrated in accommodation (62%) and catering (22%), with attractions, retail, and transport making up smaller shares. This indicates a visitor economy skewed towards hospitality services rather than a broad-based experience economy.
3. The broader Visitor Economy which is drawn from the ONS defined SIC codes as shown in Annex I shows some 9,445 jobs are sustained by spending in these service-related businesses.
4. From this estimate we calculate the direct jobs that are likely to be underpinned solely by the expenditure of visitors to Torbay. On this basis an estimated 4,623 jobs are sustained directly by the tourism economy, resulting in 2,126 FTE jobs.
5. The 4,623 direct jobs equate to an estimated 2,126 Full-Time Equivalent (FTE) jobs, highlighting the prevalence of part-time, seasonal, or casual employment in the sector.

6. Annex 1 estimates do not include indirect or induced jobs typically reported by the Cambridge model, such as South West Research Company’s Economic Impact of the Torbay Visitor Economy. There are advantages to reporting a number of employment measures with direct jobs derived from SIC codes often favoured by the ONS and the Treasury.

Implications for Torbay

- It will be important to support and diversify the accommodation sector (e.g., building resilience, promoting high quality standards, sustainable practices and off-season use). Over-dependence makes the economy vulnerable to shocks in the accommodation market (e.g., changes to tax rates and regulations, cost pressures).
- The aim should be to diversify the visitor offer to stimulate growth in under-represented sectors like attractions, entertainment, and retail. This could involve developing new experiences, events, and retail offerings that encourage visitor spending beyond bed and board, thereby creating a more resilient economy and spreading employment benefits.
- The figures understate the overall impact as they exclude the sharing economy and indirect / induced jobs. The DMP should acknowledge this hidden impact and consider strategies to engage with or formalise parts of the sharing economy, to improve quality control and ensure a fair business environment.
- Extending the season and creating more year-round, high-quality jobs. is the next step. This needs a fully fledged partnership with universities and colleges to ensure a pipeline of motivated talent and address potential workforce vulnerabilities. Strong links with education and training providers is likely to be a critical part of the new DMP.



Shutterstock (2025) Young trainee chefs_119348407

1. ONS 2024, Business Register and Employment Survey (see Annex I for full list)

2. Strategic Alignment

2.1 Devon & Torbay Strategic Policy Framework

Key Strategy Documents

(More detail of the following documents is given in Annex II)

1. ERBID Consultation Document (2027-2031)

Objective: Position the visitor economy at the core of Torbay’s future.

- Commit to strategic investment in destination marketing and product development.
- Enhance partnership working to drive sustainable tourism.

2. Destination Management Plan (DMP) Support

Objective: Re-establish the English Riviera as a premier coastal destination.

- Drive higher-value, year-round tourism using data and market insights.

• Focus on sustainability, accessibility, collaboration, and innovation.

3. Economic Growth Strategy (2022-2030)

Objective: Recognise the visitor economy as essential for Torbay’s prosperity.

- Improve infrastructure and town-centre aesthetics.
- Focus on skills development, business innovation, and place-brand enhancement.

4. Food Strategy (2025-2030)

Objective: Enhance Torbay’s food culture as a visitor attraction.

- Improve product quality and sustainability in the food sector.
- Foster local supply chains and support food-led events.

5. Outdoor Events Strategy (2021-2027)

Objective: Use outdoor events to enhance visitor experience and economic growth.

- Prioritise high-quality, well-managed events.
- Extend the tourism season and attract diverse audiences.

6. Heritage Strategy (2021-2026, Part 2)

Objective: Leverage heritage assets to enhance visitor experience and economic growth.

- Focus on product development and collaboration across cultural and tourism sectors.
- Improve access and interpretation of heritage sites.

7. Geopark Management Plan (2023-2033, Part 2)

Objective: Position the UNESCO Global Geopark as a key asset.

- Protect and enhance natural heritage while providing educational experiences.
- Ensure responsible tourism practices and community engagement.

8. Community and Corporate Plan (2023-2043)

Objective: Create a resilient and high-quality visitor economy.

- Improve infrastructure and promote sustainable development.
- Strengthen partnerships and enhance community wellbeing.

9. Sustainability and Climate Resilience

Objective: Integrate sustainability and environmental stewardship into Torbay’s long-term planning.

- Focus on carbon reduction, biodiversity conservation, and coastal protection.
- Improve access to green spaces to enhance the visitor experience and resilience.

10. Torbay Story

Objective: Strengthen the identity and market positioning of the English Riviera.

- Develop a unified narrative and visual language for branding.
- Support consistent promotion of Torbay’s strengths and character.

Summary of Key Points

1. All strategies emphasise the importance of enhancing the visitor economy through targeted investments, innovative product development, and strong partnerships. These strategies collectively aim to transform Torbay into a vibrant, resilient, and attractive coastal destination that benefits both visitors and the local community.
2. A consistent theme across all strategies is the commitment to sustainability, environmental stewardship, and climate resilience to ensure a high-quality visitor experience.
3. Strategies stress the importance of community involvement, improving infrastructure, and fostering a sense of place to create a welcoming environment for both residents and visitors.
4. Leveraging Torbay’s rich heritage and food culture is seen as vital for attracting diverse audiences and enhancing the overall visitor experience.
5. Many strategies highlight the need for collaboration among stakeholders to achieve shared goals and improve the competitiveness of Torbay as a tourist destination.

2.1 Devon & Torbay Strategic Policy Framework

Devon-wide Strategies

1. Devon & Partners LVEP Growth Plan (2025-2026)

Objective: Strengthen coordination and enhance destination competitiveness.

- Improve data and insights to inform decision-making.
- Streamline governance structures for better collaboration.
- Develop high-quality visitor products to enhance the visitor experience.
- Boost regional marketing impact to attract more visitors.

Reinforces the DMP’s vision of a resilient and distinctive English Riviera, benefiting both visitors and local communities.

2. Great South West Tourism Partnership Prospectus

Objective: Promote a strategic approach to strengthen the visitor economy in the South West.

- Encourage regional collaboration among stakeholders.
- Invest in skills development and infrastructure for sustainable tourism.
- Advocate for a unified voice for the South West to increase national recognition and funding.

Complements the DMP’s goals, creating conditions for Torbay to thrive as a leading coastal destination.

3. Devon and Torbay Local Growth Plan

Objective: Recognise and enhance the visitor economy as a driver of local prosperity.

- Focus on improving infrastructure and business support.
- Promote skills development and sustainability initiatives.
- Foster place-making efforts to strengthen destination identity.

Aligns with DMP priorities to create a vibrant, well-managed coastal destination that supports long-term community and economic wellbeing.

Summary of Key Points

1. The strategic frameworks outlined aim to cultivate a more competitive, resilient, and sustainable visitor economy in the South West, with a strong emphasis on collaboration, data-driven planning, and community engagement. A key focus across all strategies is the necessity for improved coordination among local, regional, and national stakeholders to enhance the overall visitor economy.
2. Each strategy aligns with a broader vision of creating a well-managed and competitive visitor economy that supports sustainable growth and delivers community benefits. Encouraging innovation within the tourism sector is another critical component, as it not only boosts competitiveness but also enhances the overall visitor experience.
3. Sustainability and responsible tourism practices are consistently highlighted as essential for ensuring long-term viability. Investment in infrastructure and skills development is vital for fostering a thriving visitor economy that can meet evolving demands.

Implications for Torbay – Policy & Strategy

- The strategies provide important context for future growth. They typically include numerous priorities, are not always well resourced and delivery responsibilities are often not fully articulated. It will be important for the new DMP to clearly set out the delivery side as well as being firm on the core priorities.
- There are important policy changes coming down the track such as the Statutory Registration Scheme (which may reduce the supply of sharing economy properties) and the potential for a visitor levy via the Devon & Torbay Combined County Authority (currently in consultation). This may offer a route for Torbay to resource the future development and marketing of its visitor economy and warrants review and response. This is particularly important given that many other local authorities are likely to take the route and where tourism taxes on staying visitors are likely to be the norm in 15 years, rather than the exception that they are today.
- The ultimate goal is to establish economic conditions that benefit both visitors and the local community, contributing to a vibrant, inclusive, and resilient coastal destination. A focus on evidence-led planning and insights is crucial for informing product development and marketing strategies. Strengthening the unique identity of the English Riviera is also a priority, enhancing its appeal and market positioning to attract more visitors and showcase the strengths of Torbay, together with Devon and the wider South West.

2.2 Current Governance Model

1.

The governance of the English Riviera's Destination Management Plan is currently overseen by the Destination Management Group (DMG). This group has played a pivotal role in the implementation and delivery of the DMP, fostering collaboration among various organisations and tourism businesses to enhance Torbay's development, marketing and sustainable management.
2.

The DMG brings together public and private sector partners, ensuring a balanced representation that leverages diverse expertise. The DMG is committed to making optimal use of existing resources while actively seeking additional investments to fulfil the DMP's objectives.
3.

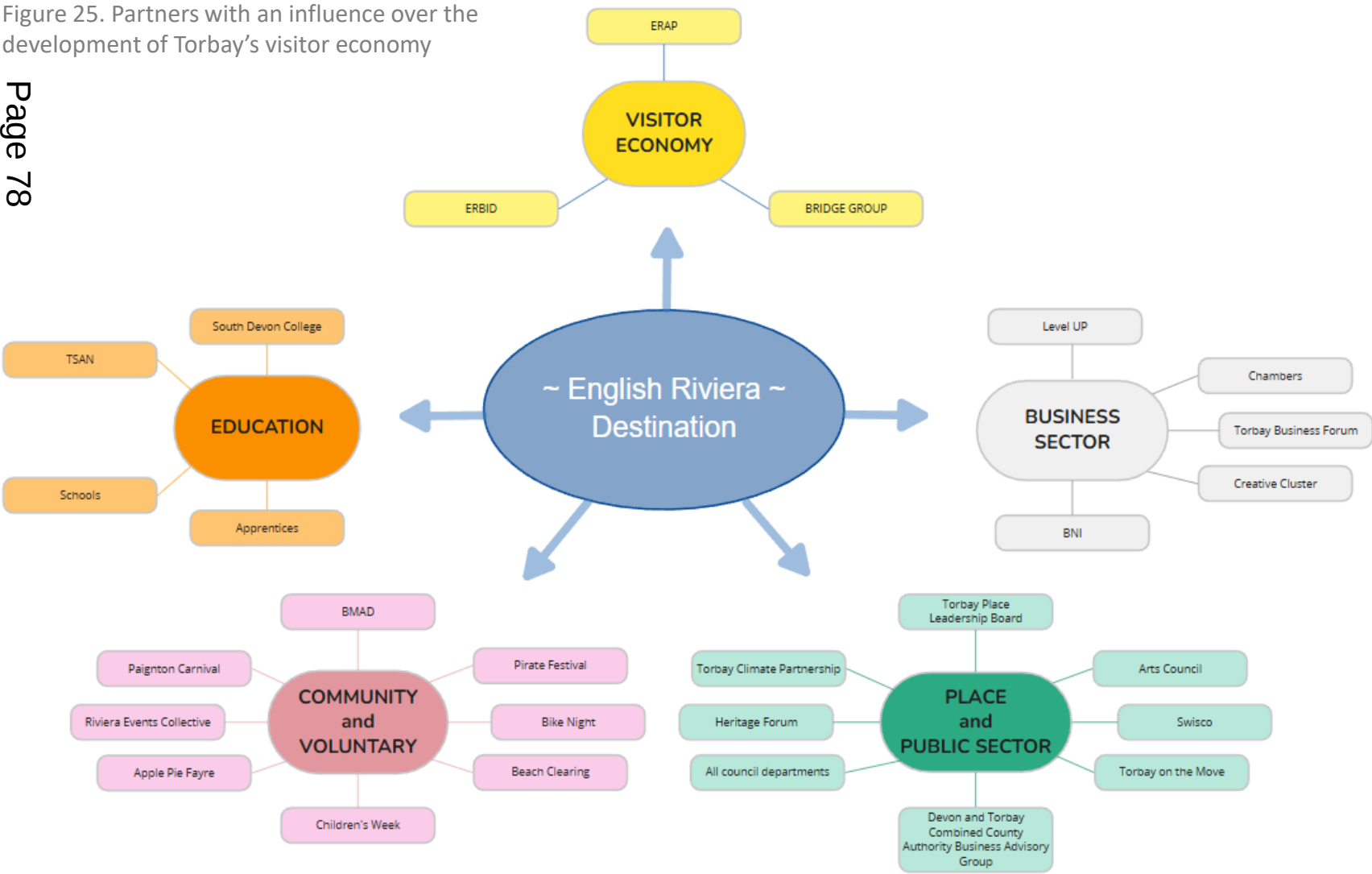
Recognising the demands placed on its members, the DMG acknowledges the need for a dedicated executive team to support the execution of the DMP's initiatives. This support is crucial for translating strategic plans into actionable tasks.
4.

The DMP is designed to align with the Torbay Economic Growth Strategy 2022-2030, outlining specific interventions aimed at advancing the English Riviera as a premier visitor destination. The first draft of the Plan focused on targeted actions and priorities, with lead organisations specified to deliver on specific tasks. In summary, the DMG serves as the central body for the governance of the DMP, driving collaboration, resource management, and strategic alignment to enhance the tourism landscape of the English Riviera.

5.

The development of a revised Destination Management Plan acknowledges that progress against the targets previously set out in the 2022 Plan has been slower to meet than required. While the existing Terms of Reference of the DMG set out sensible objectives together with details of collective and individual responsibilities, monitoring and outcomes and authority but it has no executive powers other than those which is likely to limit its .

Figure 25. Partners with an influence over the development of Torbay's visitor economy



Implications for Torbay - Governance Models

- The diverse array of business, community and stakeholder groups presents a significant opportunity for action for the new Destination Management Plan (DMP). By fostering coordinated action, the DMP can align strategic projects with the operational delivery creating a cohesive approach to growing the visitor economy.
- Central to this collaborative effort is likely to be the Place Board, which could serve as the focal point for assigning relevant actions to specific groups. To implement actions effectively, the creation of task and finish groups may prove to to be important. Such groups could be composed of key members from established organisations/groups who can act as catalysts for action, taking specific priorities forward and ensuring that progress is made.
- The establishment of accountable action planning and delivery groups is likely to be important for delivering actionable strategies and fostering collaboration. These groups can inspire the business community by clearly linking initiatives to tangible benefits.
- By harnessing the strengths of diverse stakeholders, a robust framework for action could be created that not only drives growth but also enhances the overall vitality of the visitor economy and ensures that Torbay is well-positioned to meet the challenges and opportunities ahead.

3. Destination Supply Side – The English Riviera Today

3.1 Tourism Economy Accommodation – 2019 Audit

Figure 26. Accommodation supply by Number and Type



Torbay 2019 Visitor Accommodation by Type

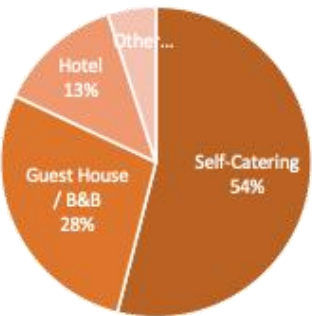
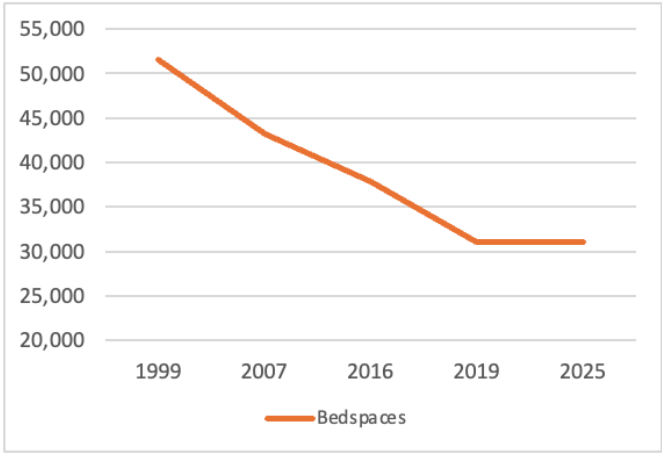


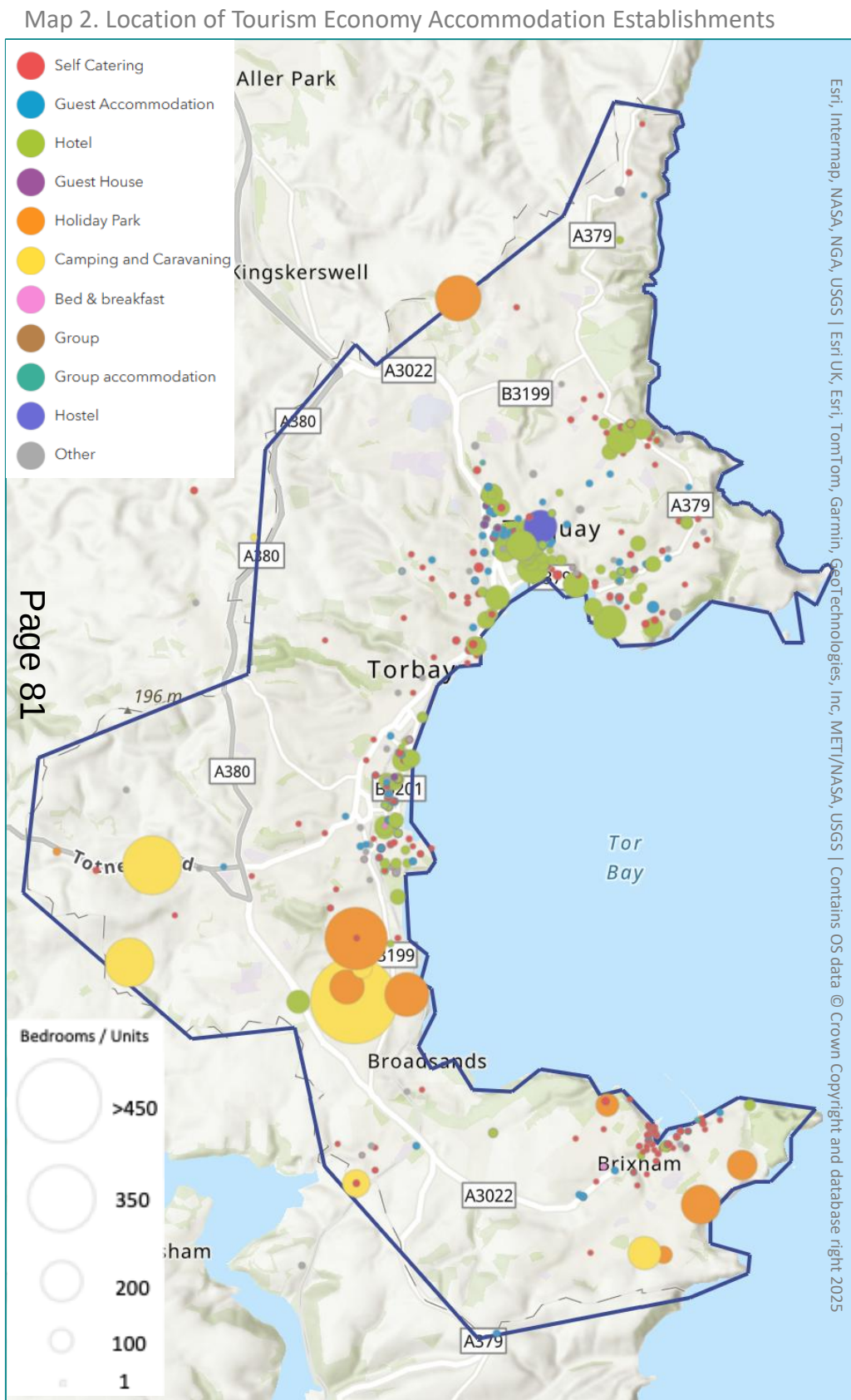
Figure 27. Accommodation Supply: 25-Year Trend



1. A 2019 audit of Torbay’s visitor accommodation supply found 914 establishments, amounting to 11,001 rooms or units. Over half of the total establishments (54%) were self-catering. Serviced accommodation including B&Bs, guest houses and hotels made up 41%. ¹
2. The map overleaf on page 21 shows that visitor accommodation in Torbay is heavily concentrated in Torquay, which contains the largest share of establishments at 40%, reinforcing its position as the area’s primary visitor centre. Paignton accounts for a further 29%, indicating a strong secondary accommodation base, while Brixham holds 24%, still a significant but more specialised tourism market. Babbacombe, with just 8% of establishments, has a much smaller and more localised accommodation offer compared with the main resorts.
3. The audit highlighted a lower supply of branded hotels in Torbay (9%), compared to the UK (47%) and to other coastal places such as Brighton (50%), Scarborough (25%) and Bournemouth (33%). ^{2,3}
4. There was a small increase noted in Torquay’s serviced accommodation supply between 2014 and 2019, with only 3% (350 bed spaces) growth in the number of bed spaces. Comparatively, both Paignton and Brixham saw increases of 37% (1,080 bed spaces) and 35% (175 bed spaces) respectively.
5. The 2019 Accommodation Audit identified just two properties on Airbnb. In November 2025 there were 1,409 properties listed on Airbnb across Torbay which represents a decline of 6.1% over 2024. There were 1,740 listed in August 2025. Nationally, there has been a 28% increase in the number of short-term rental properties available since 2019. ⁴
6. Peak season serviced accommodation occupancy remains below 80%, indicating an oversupply of stock ⁵
7. Figure 27 shows the 25-year trend of declining bedspaces which is not unusual amongst the majority of English resorts.
8. It is estimated that since the 2019 audit the number of bedspaces may have been maintained or increased marginally as a result of the growth in the Sharing Economy adding some 5,000 bedspaces across Torbay.
9. Ideally the 2019 audit should be updated as since it is likely that a proportion of smaller B&Bs will have transferred to self-catering operation with distribution through Airbnb, Booking.com or similar channels.
10. Any increase in supply since 2019 has clearly been affected by structural problems including COVID-19 and the cost-of-living crisis. This has put substantial and continued pressure on all types of tourism businesses. This pressure is not about to let up given recent increases in employers NI upcoming business rates increases and continued downward pressure on the number of staying visitors and the new Plan needs to reflect this reality.

1. Source: Torbay Accommodation Audit database 2019
2. Institute of Hospitality (Spotlight on Hospitality 2019), from Summary Serviced Accommodation in Torbay 2019
3. AM:PM from Summary Serviced Accommodation in Torbay 2019
4. Source: VisitBritain <https://www.visitbritain.org/research-insights/uk-short-term-rentals>
5. Source: South West Visitor Economy Hub, 2025, Visitor Economy Report for English Riviera – Quarter 3 2025, July - September 2025

3.2 Accommodation Supply & Distribution



1. This page splits visitor accommodation supply into two main clusters, the Tourism Economy and the Sharing Economy. Data is from 2019 and 2025 respectively.
 - *The Tourism Economy* reflects the professional sector, usually run by businesses registered at Companies House, that have a website, often employ staff, may pay VAT and are often be a member of a tourism body, typically a trade association or DMO. The majority of serviced accommodation is part of the tourism economy but it also includes many non-serviced holiday cottage businesses.
 - *The Sharing Economy* reflects the emergence of less formal operations that are usually promoted through one or more channels such as Airbnb and are often not businesses, but instead operated by individual property and home owners, usually on a non-serviced basis.
2. Typically, the Sharing Economy has more establishments but the Tourism Economy has the higher number of rooms, reflecting the larger scale nature of most professional operations.
3. While there are two broad clusters of accommodation types, there are also two main categories within the Tourism Economy: serviced and non-serviced accommodation. This recognises the very different experience provided by a serviced offer, which in general has declined in favour of non-serviced over the last decade.
4. Table 5 gives an indicative view of Torbay's current supply. Map 2 shows the prevalence of a high number of small businesses trading with under 3 rooms, clusters of hotels in Torquay and Paignton and a number of larger holiday parks and camp sites, particularly to the south of the area.
5. The Sharing Economy is reported in more detail overleaf.

Table 5 Accommodation supply: Tourism Economy & Sharing Economy

	Establishments	%	# Serviced Rooms	# Non-Serviced Rooms	Total Rooms	%
Babbacombe	70		946	72	1,018	
Brixham	216		287	844	1,131	
Paignton	264		1,717	2,215	3,932	
Torquay	364		4,102	818	4,920	
Tourism Economy	914	39%	7,052	3,949	11,001	81%
Sharing Economy	1,447	61%		2,605	2,605	19%
Total Stock	2,361		7,052	6,554	13,606	

NB - Indicative figures. Many 2019 properties now likely to be trading via Airbnb and offering a non-serviced offer
Data for Tourism Economy sourced from ERBID/Torbay Council. Sharing Economy data derived from AirDNA 2025
Sharing economy stock taken as an average using August 2025 & November 2025 listings data

3.3 Accommodation Supply – Sharing Economy

Figure 28. Sharing Economy Revenue £m - 2025 Year to Date



Table 6. Torbay UA - Sharing Economy - YTD Summary

Sharing Economy Performance Jan 2025 - Nov 2025	Total	Against last year
Total Revenue	£29,400,000	-7.5%
# Available Listings	15,605	-7.9%
# Booked Listings	14,016	-3.9%
Room Nights Available	735,658	-6.6%
Room Nights Booked	393,268	-3.9%
Occupancy Rate	55%	3.5%
Average Day Rate	£144	-3.9%
RevPAR	£78.90	-0.5%
Jobs supported by Revenue <i>circa</i>	537	

Figure 29. SE Low & High Season Comparative Occupancy

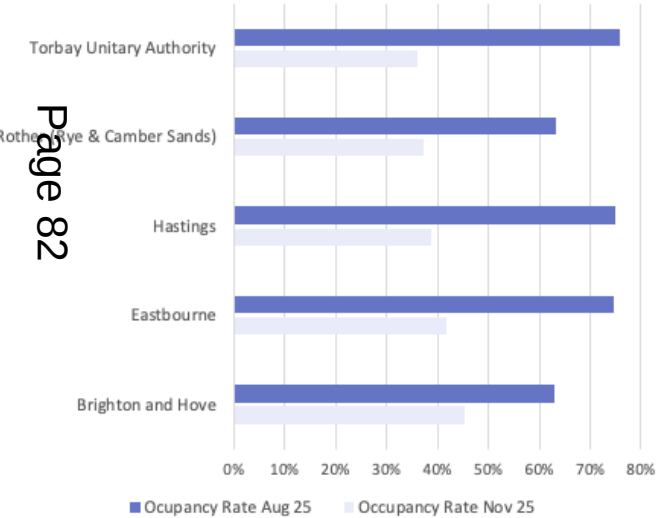


Figure 30. SE Relative Size and Three-Year Growth Trend
(Revenue in £m for September 2025 and the two previous years)

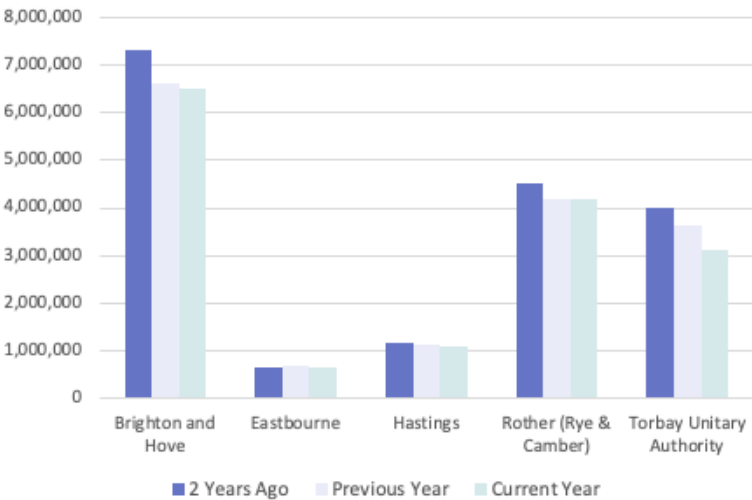
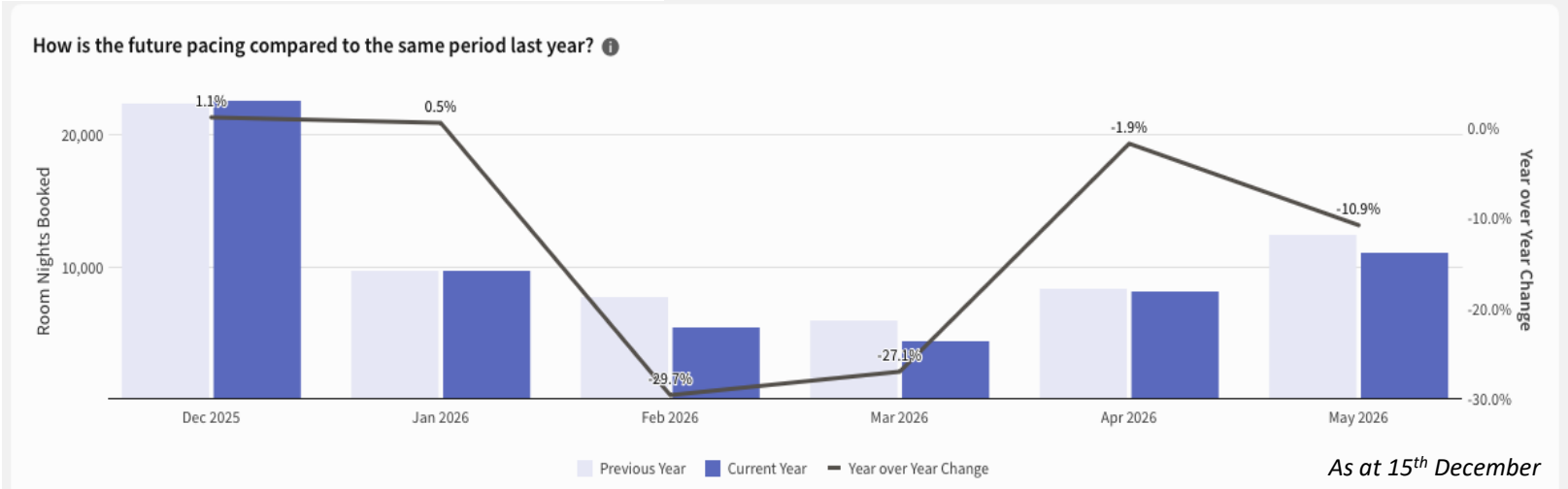


Figure 31. SE – Forward Bookings – to May 2026



1. Table 6 shows that total revenue from Sharing Economy businesses in the 11-month period to November 2025 was £29.4 millions trading from around 1,450 properties underpinning an estimated 537 jobs - which will be largely hidden from official statistics. ¹
2. The performance has suffered when looked at against the last two years but that trend is not confined to Torbay and is hitting other resorts in the same way due to cost-of-living pressures – see Figure 30.
3. An average occupancy rate of 55% across the period is reasonable and slightly higher than many inland and rural destinations, but somewhat lower than many towns. It has gone up as supply has contracted in 2025 when compared to 2024. Torbay compares well for high-season occupancy against the comparators shown in Figure 29.
4. However, occupancy in the winter (i.e. November 25 in the chart showing other comparator destinations) is lower in Torbay than in any of the other comparator destinations. This reflects in part the catchment and can be addressed with events and other action to draw people in, particularly during the Autumn shoulder.
5. Sharing economy properties represent 19% of all rooms in Torbay and are an important component, potentially attracting a younger audience than the more traditional stock. There would be benefits in developing this network, as at the moment many will be operating in isolation.
6. Figure 31 shows that Sharing economy forward bookings are softer in 2026 when compared against this year reflecting the fragility in current consumer confidence.

Implications for Torbay – Accommodation

- There is still a general oversupply of stock which depresses occupancy rates and reduces the viability of proposed / new accommodation developments
- Operators in the Sharing Economy should be supported and engaged in the DMP to maximise quality and create synergies across the wider visitor economy.

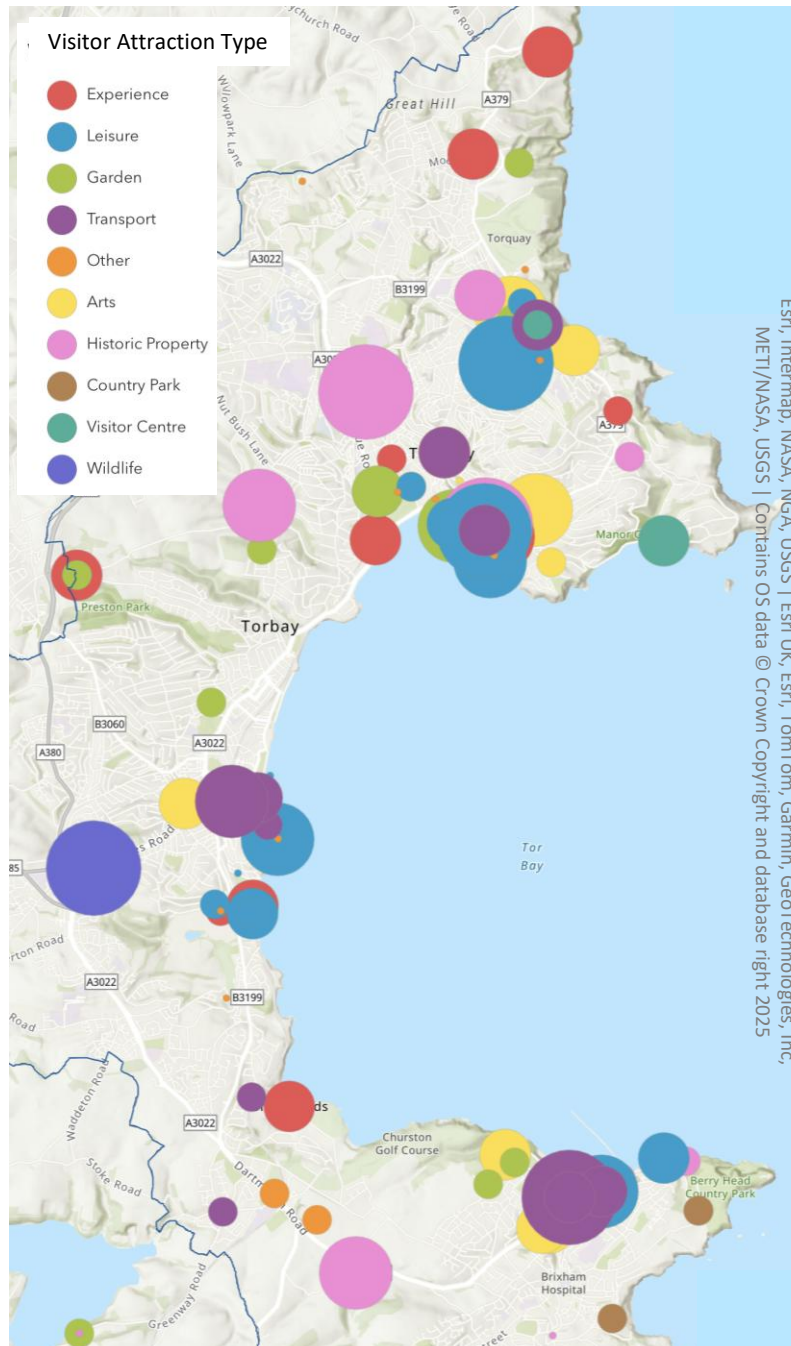
1. Job estimates calculated using Deloitte & Oxford Economics methodology set out in *Tourism Jobs & Growth* November 2013 commissioned by VisitBritain

3.4 Visitor Attractions

Table 7. Visitor Attractions in Torbay by Type

Main Category	Nos.	Category Detail	Nos.
Country Park	6	Playground	1
		Municipal Park	1
		Nature Reserve / Wetlands etc	3
		Sculpture Park	1
Experience	33	Cookery	0
		Cycling	2
		Guided Tour	9
		National Trail	1
		Outdoor	13
		Arts / Crafts	1
		Riding	0
		Walking Routes / Car Free Trails	6
		Other Experience	1
Garden	19	Formal / Park / Estate	11
		Arboretum / Caves / Forest	8
Historic Property	11	Abbey / Castle / Fort / Tower / Priory	1
		Historic House / & Garden / Palace	4
		Monument / Archaeological Site	3
		Place of Worship (still in use)	1
		Other Historic Property	2
Leisure	46	Beach	25
		Bowling / Casino / Cinema	3
		Public Space	5
		Model Village	1
		Gaming / Entertainment / Leisure Zones	3
		Theme Park / Adventure Park	6
		Lake / Reservoir / Recreation	3
Arts	12	Museum	6
		Art Gallery / Arts Centre / Theatre	6
		Venue - Music etc	0
Transport	19	Miniature / Model Railway	0
		Steam / Heritage Railway	2
		River Cruise / Boat Tours	14
		Transport - Other	3
Visitor Centre	3	Heritage / Visitor Centre	1
		Viewpoint	2
Wildlife	1	Farm / Rare Breeds / Farm Animals	0
		Safari Park / Zoo / Aquarium / Aviary	1
Workplace	0	Distillery / Vineyard / Brewery	0
		Industrial / Craft Workplace	0
Other	13	Specialist Retail	0
		Sports Venue - Spectator	1
		Sports Venue - Participant	12
	163		163

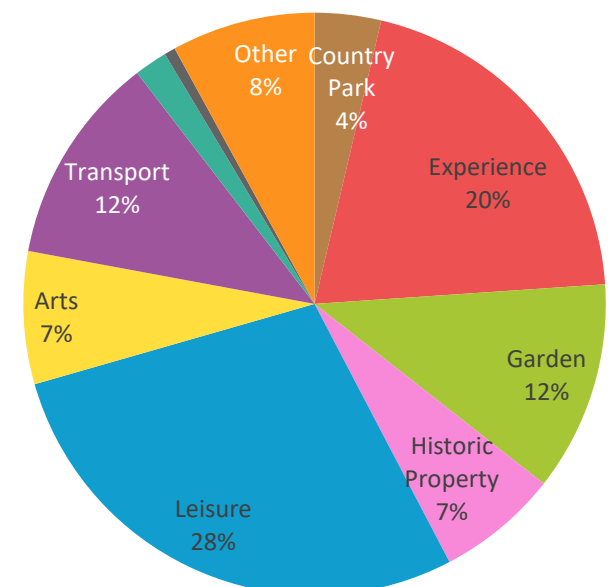
Map 3. Visitor Attractions - Distribution across Torbay



NB – Map shows all visitor attractions on the table apart from the area's 25 beaches. The size of the circle reflects the Attraction's strategic importance – see overleaf for further commentary.

1. While there are 144 attractions and 61 activities listed on the English Riviera BID website some of these report multiple activities at the same site, or are generic or are only likely to be of interest to a local market.¹
2. The analysis here reports 163 visitor attractions in or around Torbay that are likely to be important for visitors to varying extents.
3. As the map shows, the geographic spread of attractions in Torbay is clearly centred on Torquay, which accounts for the largest share at 45%, reflecting its role as the district's main tourism hub. Paignton follows with 25%, showing its strong contribution to the overall visitor offer, while Brixham provides 22%, likely linked to its harbour, maritime heritage, and wildlife experiences. Babbacombe has a much smaller share.
4. The leisure offer predominates backed up by a range of historic properties and gardens often combining which will be of interest particularly to the more senior market. Numerous experiences are listed and make up 20% of the offer but are less likely to be important from the perspective of driving visitors to Torbay. Some of the transport related visitor attractions are important whether that be by boat or steam train.

Figure 32 Visitor Attractions By Type



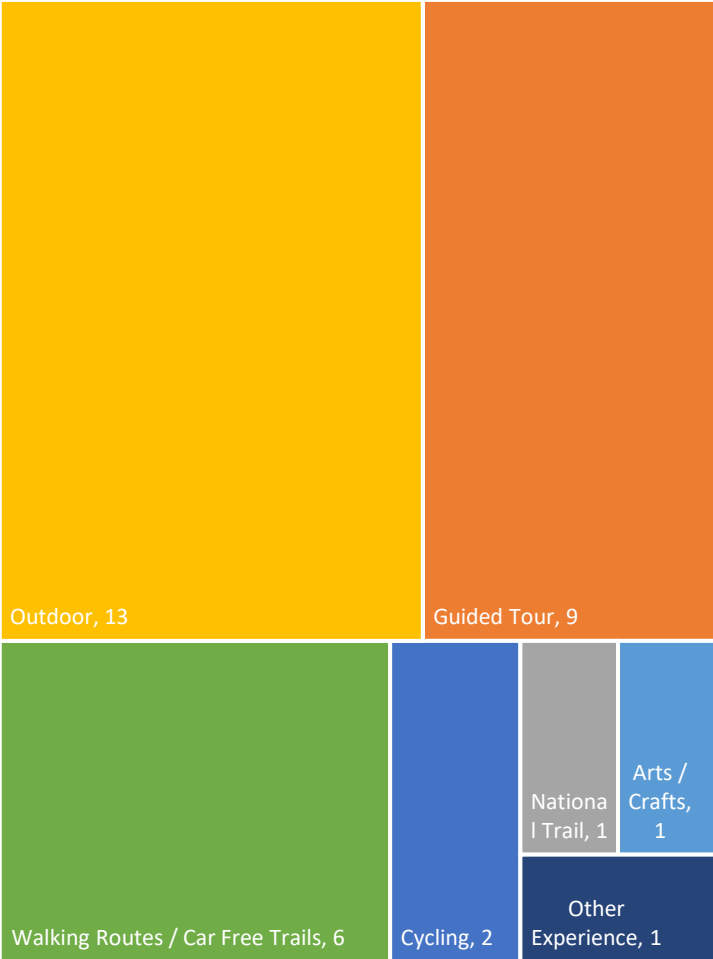
1. Source: <https://www.englishriviera.co.uk/things-to-do/english-riviera-attractions>

3.5 Strategically Important Visitor Attractions

Table 8. Strategically Important Visitor Attractions

Name	TT Category Detail
National Trust - Greenway	Historic Property
Kents Cavern Prehistoric Caves	Historic Property
Torquay Harbour & Marina	Leisure
Torquay Marina	Leisure
Dartmouth Steam Railway and River Boat Co.	Transport
Paignton Zoo	Wildlife
Princess Theatre, Torquay	Arts
Bygones Torquay	Arts
Torquay Museum	Arts
Dame Agatha Christie CBE sculpture Torquay	Country Park
Agatha Christie's Extraordinary Life - ERBID Tour	Experience
South West Coast Path	Experience
Torquay's Dinosaur World	Experience
English Riviera Wheel	Experience
Torquay Watersports	Experience
Potent Plants Garden - Torre Abbey	Garden
Torre Abbey	Historic Property
Beaton Fishacre	Historic Property
Babbacombe Model Village	Leisure
Brixham Harbour & Marina	Leisure
Paignton Harbour	Leisure
Splashdown Quaywest	Leisure
Dartmouth Day Cruise	Transport
Babbacombe Cliff Railway	Transport

Figure 33. Experiences by Type



1. Of the 163 visitor attractions only a third or so are likely to be driving significant visits, either because they are previously known or because they are discovered as part of the trip planning process.
2. All visitor attractions have been categorised into their strategic importance with the Top 24 in Table 8 being seen to be the fundamental part of the offer.
3. There will be significant benefit in working with these attractions together with the 25 beaches which potentially could be classified and zoned with different sports and activities taking place as appropriate.

Table 9. Torbay's 25 Beaches

Ansteys Cove	Maidencombe
Babbacombe	Man Sands
Beacon Cove	Meadfoot
Breakwater	Oddicombe
Broadsands Paignton	Oyster Cove
Churston Cove	Paignton Sands
Corbyn Sands/ Head	Preston Sands Paignton
Elberry Cove	Saltern Cove Paignton
Fairy Cove	Shoalstone
Fishcombe Cove	St Mary's Bay
Goodrington Sands	Torre Abbey Sands
Hollicombe Beach	Watcombe
Livermead	

Table 11. Visitor Attractions Distribution by Place

	#	%
Brixham	36	22%
Paignton	41	25%
Torquay	73	45%
Other	13	8%

Table 12 . # Experiences Developed

Torbay	20.2%
Essex	33.5%
Peak District	35.6%

Table 10. Assessment Criteria

	Importance	Definition	#	%
1	Not at all important in strategic terms	This attraction is not going to influence visits to Torbay but may be interesting for some niche groups to stumble across	19	12%
2	Of below average importance in strategic terms	This attraction is not going to influence visits to Torbay but may be interesting for a broad set of visitors to find and enjoy	49	30%
3	Of average importance in strategic terms	Lkely to have been known about in advance and may have been a consideration at the booking stage or during pre-trip research or as part of a repeat visit.	45	28%
4	Of high importance in strategic terms	An important driver for Torbay leisure visits and /or will likely to have been part of the destination choice decision and pre-trip planning.	44	27%
5	Very important in strategic terms	This attraction drives huge numbers of leisure visitors to Torbay and can be considered a key attribute of the place	6	4%

Implications for Torbay – Visitor Attractions

- Table 12 shows that Experiences are not as developed as some other areas such as Derbyshire & The Peak District and Essex which both show appreciably more Experiences as a proportion of the total number of visitor attractions / activities. This may represent an opportunity area.
- As well as Experiences, there is a case for considering new visitor attractions that are intrinsic to the destination and can might be developed to attract new audiences and encourage repeat visits, for example attractions based on the Geopark designation or culture / the arts.

3.6 Visitor Experience & Service Quality

Table 13. Visitor Satisfaction Survey Results

SATISFACTION INDICATOR	2021	2022	2024	Trend	Potential Focus
Cleanliness of the streets	4.01	3.96	3.72	-0.29	AREAS FOR ACTION
Shopping - range	3.60	3.51	3.32	-0.28	
Upkeep of the parks & open spaces	4.39	4.34	4.22	-0.17	
Places to visit/attractions - value for money	3.91	3.82	3.77	-0.14	
Shopping - quality of service	3.97	3.88	3.85	-0.12	
Quality of the beaches	4.41	4.39	4.29	-0.12	
Parking - quality of service	3.44	3.40	3.32	-0.12	
Nightlife/evening entertainment - quality of service	3.90	3.88	3.79	-0.11	
Pedestrian signs	4.05	3.97	3.94	-0.11	
Places to visit/attractions - quality of service	4.17	4.14	4.06	-0.11	
Shopping - value for money	3.68	3.60	3.57	-0.11	WATCH OUT AREAS
Parking - ease of parking	3.40	3.32	3.31	-0.09	
Overall impression of the English Riviera in terms of feeling of welcome	4.42	4.36	4.33	-0.09	
Places to eat & drink - value for money	3.86	3.78	3.78	-0.08	
Overall impression of the English Riviera in terms of general atmosphere	4.44	4.42	4.37	-0.07	
Parking - value for money	3.03	3.03	2.96	-0.07	
Places to eat & drink - quality of service	4.14	4.09	4.07	-0.07	
Public transport - quality of service	4.33	4.16	4.27	-0.06	
Nightlife/evening entertainment – range	3.79	3.84	3.73	-0.06	
Places to eat & drink – range	4.16	4.16	4.11	-0.05	
Road signs	4.19	4.11	4.15	-0.04	STATIC / IMPROVING AREAS
Overall enjoyment of your visit	4.63	4.60	4.59	-0.04	
Places to visit/attractions – range	4.28	4.33	4.26	-0.02	
Display maps & information boards	3.92	3.89	3.90	-0.02	
Nightlife/evening entertainment - value for money	3.71	3.66	3.69	-0.02	
Public transport - value for money	4.18	4.06	4.17	-0.01	
Accommodation - value for money	4.24	4.23	4.28	0.04	
Accommodation - quality of service	4.55	4.52	4.63	0.08	

Source – Table re-presented from The English Riviera Visitor Survey 2024 by the South West Research Company published March 2025, pg. 71 – Visitor Satisfaction categories and scores 2021, 2022 & 2024.

Implications for Torbay - Visitor Experience & Service Quality

- The decline in visitor satisfaction needs to be addressed firmly and as a priority. Partners should consider prioritising and resourcing place-related actions that upgrade the quality of key elements of the product, particularly the clean, safe and legal elements.
- Putting in place common branding /upgrading of shopfronts across the three town centres should also be considered to improve ambience and quality.
- While investment is improving key areas, a focus that looks again at the visitor journey and public realm management and operational priorities will help lift what is one of the UK’s foremost leisure destinations.

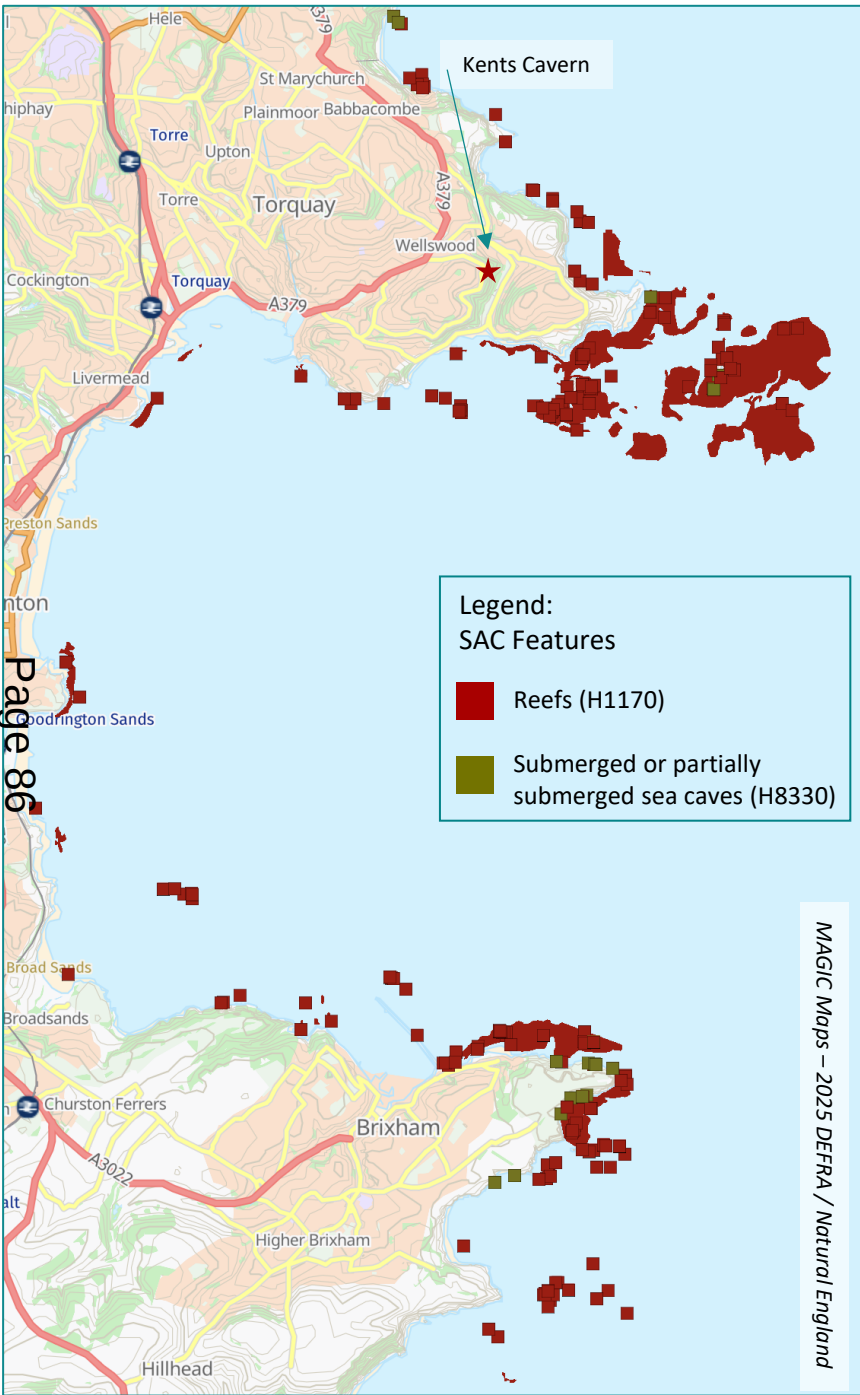
1. Table 13 shows the changes to visitor satisfaction between 2021 to 2024, derived from the visitor survey scores using a Likert scale of between 1 and 5 where visitors scored various satisfaction indicators. Small movements using such a scale accurately reflect longer term trends and in Torbay’s case reflect a reduction in visitor satisfaction over time. Worryingly most trends are downwards with concerns raised about key elements of the current product and experience.
3. The relative change (the ‘Trend’ column) is showing decline in key elements of the service offer, and despite the score being relatively high for some elements, their relative decline is a watch out. Areas like the decline in the range of the retail offer is not a surprise given wider trends but the reduction in cleanliness is within partners’ ability to address. Of the ten *Areas for Action*, half need to be progressed by the public sector. Of key importance are:
 - the cleanliness of the streets;
 - the upkeep of parks and open spaces; and
 - The quality of the beaches.
4. These areas have shown decline in satisfaction / quality over the three-year period. Areas like parking will normally be marked lower but there is watch out here too with the related quality of service measure. A combined and gradual decline may have influenced the overall impressions of atmosphere and enjoyment showed by the rows shaded yellow. This survey result is backed up by early responses to the current survey of businesses – see the word cloud - Figure 34.
6. Accommodation showed a net increase over 2021 in terms of both value for money and quality which is a credit to the sector across Torbay and something to be celebrated and built on.

Figure 34 – Interim Results – Business Survey 18.12.25



3.7 Habitats Regulations Assessment

Map 4. Torbay Special Areas of Conservation



This slide reflects a client request
References: Gov.UK (2021) <https://www.gov.uk/guidance/habitats-regulations-assessments-protecting-a-european-site>
Natural England (2018):
<https://designatedsites.naturalengland.org.uk/Marine/MarineFeatureConditionDirect.aspx?SiteCode=UK0030372&SiteName=Torbay&SiteNameDisplay=Lyme%20Bay%20and%20Torbay%20SAC&countyCode=11&responsiblePerson=&SeaArea=&IFCAArea=&NumMarineSeasonality=>

1. Habitats Regulations protect key habitats and species and are usually designated as Special Areas of Conservation (SAC), Special Protection Areas or Ramsar sites. There is a general duty to protect conserve and restore such sites. Torbay has one Special Area of Conservation shown on the map which is marine based. It was designated in September 2017 as an inshore site and also includes a large area in Lyme Bay to the east. The area in Torbay is also protected under the UNESCO Global Geopark designation.
2. The SAC is composed of reef and cave habitat with the reef exhibiting geological variety supporting a number of reef features. The caves lie at various levels above and below the high-water mark and occur in several different rock types. The main threat to the site is seen to be from fishing activity. While this is one site, the general principle for many areas is that nature needs greater focus to turn around current decline and recovery will be via a systemic change in approach, strong local partnerships and increased investment.
3. Reflecting the importance of the destination's geology, Kents Cavern is one of the most important sites in the English Riviera Geopark and is graded by TripAdvisor as #1 visitor attraction in the area with 94% visitors seeing it as either Excellent or Very Good. It is notable both for its archaeological and geological features. The cave system has been a geological Site of Special Scientific Interest since 1952 and a Scheduled Ancient Monument since 1957. Kent's Cavern is one of the most strategically important visitor attractions as identified earlier in this document.
4. Water-based activities such as stand-up paddle boarding, scuba diving and snorkelling are growing in popularity and can be promoted as part of the wider geopark and encouraged within the SAC subject to the activities being managed in a way that reduces any negative impacts.
5. A Habitats Regulations Assessment is needed to test if a plan or project proposal could significantly harm the designated features of a SAC. The onus is on the 'competent authority' to undertake such an assessment, in this case Torbay Council.

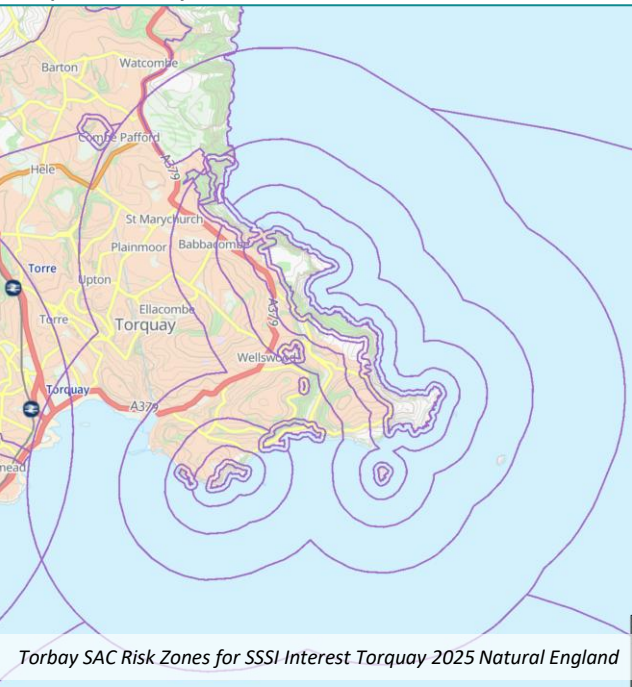
Does the new Destination Management Plan need an HRA?

6. The Destination Management Plan will set out ways in which Torbay's visitor economy can be grown over the next decade. While it is not a statutory plan it is likely to have impacts, particularly in terms of built development proposals, but these will also be subject to the planning process that considers wider issues such as environmental impact assessment. Typically, site-specific proposals may be subject to HRAs based on their likely impact on air, water or noise pollution as seen in the Risk Zones highlighted for Torquay in the map below.
7. The Destination Management Plan however will not contain site-specific development proposals and is not a statutory requirement in itself, so may not fall within the definition of a Plan or a Project as defined by the Conservation of Habitats and Species Regulations 2017. It is advised to discuss this further with Natural England in the first instance and to potentially undertake a preliminary screening process to inform those discussions.

Implications for Torbay

Develop a comprehensive overview of all Geopark assets in Torbay in order to be able to both protect this unique heritage and develop the leisure and tourism opportunities inherent within the destinations.

Map 5. Torbay SAC Risk Zones



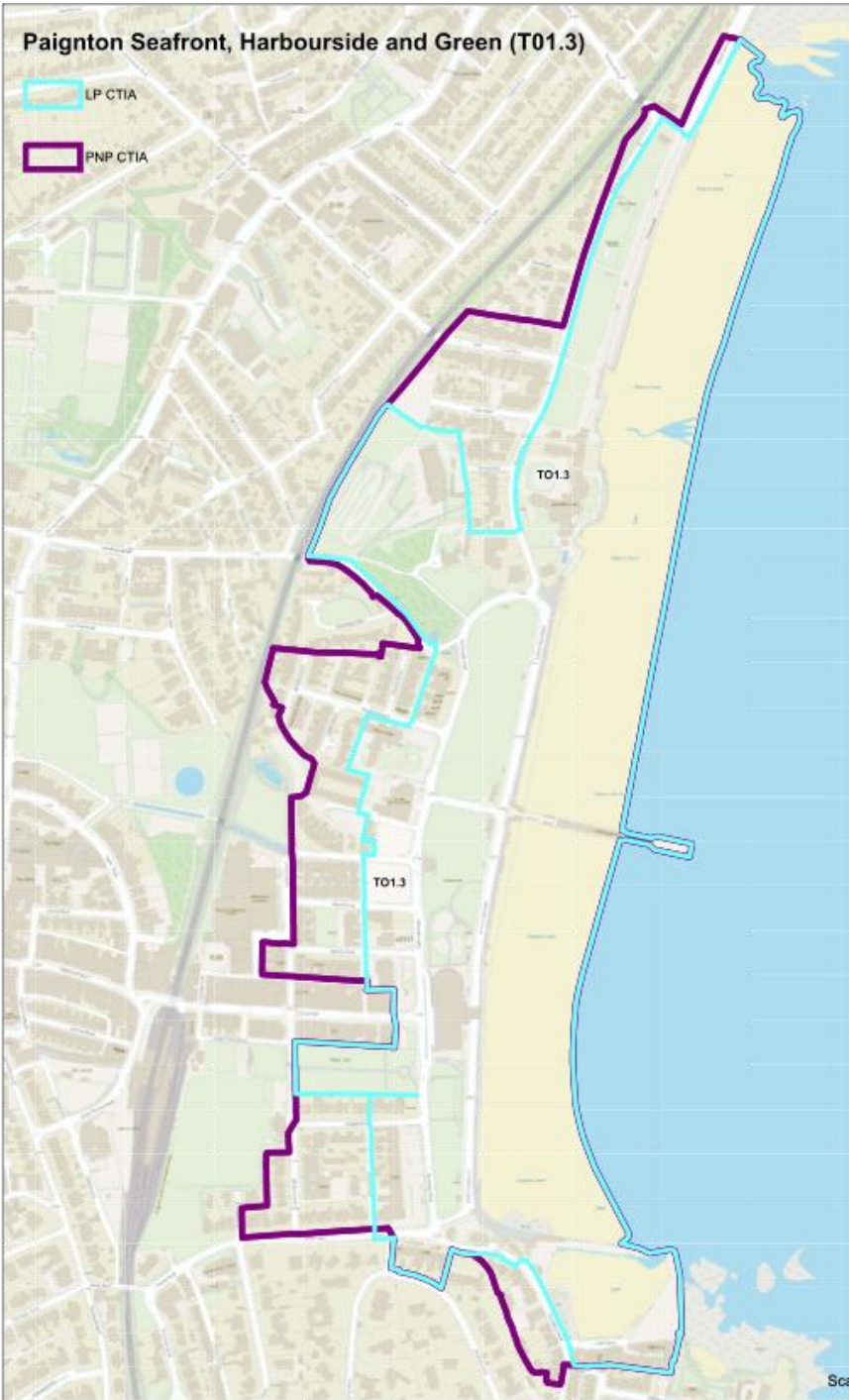
Torbay SAC Risk Zones for SSSI Interest Torquay 2025 Natural England

3.8 Torbay Local Plan Update: Core Tourism Investment Areas (CTIA)

Key points from the Local Plan update on CTIA's, Jan 2025

- Page 87
1. The previous Plan recommended a 2% reduction in serviced accommodation: about 300 bedspaces. Since then, there have been the following new developments: Hampton and Premier Inn in Torquay; Mercure (161 rooms) and Ibis (121 rooms), hotel Indigo in Paignton. Plus, the refurbishment of the Redcliff Hotel.
 2. Change of use from holiday accommodation is not strictly prevented but require a “reasonable prospect test.” Historical environment and market viability are crucial factors. Hotels are often costly to convert for non-tourism uses, making it financially attractive to let rooms to non-tourists.
 3. Requirements for Change of Use: When change of use from tourism is permitted, there will be a requirement to restore or enhance buildings or land.
 4. There has been discussion on potentially reducing CTIA areas or focusing solely on waterfronts. Proposal for a more flexible approach to residential use in key areas, subject to proper conversions. Relaxation of “reasonable prospect test” to emphasise positive regeneration.
 5. Tourism Regeneration Areas: Designation of specific areas for focused tourism investment with relaxed controls. Addressing “Agent of Change” issues to promote harmonious coexistence between residents and tourists.
 6. In Core Tourism Investment Areas (CTIAs), retention and enhancement of tourism supply is prioritised. Change of use to non-holiday purposes is allowed if facilities lack improvement potential or if it contributes positively to regeneration. Non-tourism developments must align with the tourism character of the area.
 7. Outside CTIAs, change of use from holiday accommodation is permitted if the holiday character and range of facilities are not undermined. The site has limited significance regarding holiday settings, views, or relationships with tourism facilities. The redevelopment or change of use provides regeneration benefits that outweigh the loss of holiday accommodations.
 8. Inside and outside CTIAs, proposals for small apartments, hostels, and houses in multiple occupation (HMOs) will not be allowed if they conflict with the tourism character of the Bay. Any increase in deprivation or incompatible uses will also be rejected.

Map 6
Paignton Seafront, Harbourside and Green Coastal Park CTIA



Source: Torbay Council, Torbay Local Plan Update: Core Tourism Investment Areas January 2025

1. There is a clear policy in place with new branded hotels revitalising the offer and adding vital improvement to current stock. Continuation of this strategy is recommended.
2. At the same time there will be a range of typical guest house and B&B accommodation where owners will be seeking to retire which should be facilitated – possibly by increasing the bedspace reduction target over the next 5 years, which reflects the increase in supply brought in by properties using the Sharing Economy as well as general growth.
3. Figures 1 to 6 on page 6 show the pressure on staying visitor demand over the period 2006 – 19 and also later between 2021 – 23. These figures are not comparable. While Torbay still gets greater volume than other parts of Devon there is a much more competitive market in place which demands continued new and significant investment from both public and private sectors. Staying visitors should be the priority in the new DMP.
4. The domestic tourism landscape is likely to be difficult for the next two to three years necessitating a very targeted marketing strategy to stay in the same place in terms of visitor numbers. From 2028, growth is likely to return with some key drivers, such as climate change, that can help Torbay to grow its core markets, such as older visitors, who will be increasingly less likely to visit southern Europe.
5. There are clearly some very good accommodation providers across Torbay who would welcome support to grow their business further through productivity gains via digitalisation, improvements to service quality, sustainability, accessibility and other drivers that can increase profitability.

Implications for Torbay

- Continue to facilitate the change of use of older stock to residential use. Consult on increasing the bedspace reduction target from 2% to include ranges of 2.5%, 5%, and 7.5%.
- Consider a dedicated and highly selective programme of Business Support for high growth accommodation providers in the Tourism Economy to digitalise and improve productivity and profitability.

4. Review of the Existing DMP

What the DMP Set Out to Achieve

“The Destination Management Plan sets out the priority actions and delivery tasks that can help the destination succeed”¹

Objectives for the life of the plan were:

- **Recover** – return to 2019 spend and visitor levels by 2024
- **Grow** – achieve an additional £75m of tourism spend and 1,500 new FTE jobs by 2030
- **Re-balance** – more sustainable visits, with 40% of visits from October – March

Delivery Performance & KPIs Achieved

See Annex III for more detail.

1. Strong delivery where KPIs were clear and owned (e.g. Seafood Feast, marketing activity, surveys, events, Meet English Riviera).
2. Events, food & drink, on/in the water activity and Geopark discovery experiences largely delivered or exceeded targets, often with good partner engagement.
3. Marketing activity aligned well to DMP themes, with regular delivery despite some gaps in formal research and brand review.
4. KPIs weakest where actions were exploratory, long-term or policy-led (e.g. town centre regeneration, planning policy, brand strategy review).
5. Heavy reliance on narrative rather than quantitative data across many actions limits performance assessment.

What Worked, What Didn't

What Worked

- ✓ Clear, SMART KPIs (e.g. events, surveys, footfall, bookings). Partner-led delivery models (ERBIDCo, ERUGGp, Meet English Riviera). Existing market momentum (water sports growth, food reputation, UNESCO designation).
- ✓ Flexible adaptation of actions where the market was already responding (e.g. water sports hub).
- ✓ Clear outcomes and evaluation with positive honest feedback regarding the future data and progress being made.

What Didn't

- ✗ Actions without defined baselines or numeric targets. Baseline data is missing for some indicators, making it difficult to understand the degree of change achieved.
- ✗ Duplication across themes (food & drink, sustainability, Geopark storytelling), reducing clarity of purpose.
- ✗ Resource constraints limited new research, brand development and ambassador programmes. Evidence was not available for all actions, making it challenging to accurately assess performance against several KPIs.
- ✗ Monitoring challenges where responsibility was diffuse or data was not routinely captured.
- ✗ Some KPIs appear insufficiently ambitious, reducing their effectiveness as drivers of meaningful progress.

Implications for Torbay

Continue

- Signature events (Seafood Feast, major water sports events).
- Annual surveys and performance reviews
- Partner-led delivery through DMG, ERBIDCo and ERUGGp.
- Integration of sustainability and Geopark narratives into experiences.

Adapt

- KPIs: move from narrative to fewer, clearer, measurable indicators and allocate required investment
- Geopark actions: align explicitly to the Geopark Management Plan to avoid duplication.
- Marketing KPIs: balance storytelling with headline metrics (reach, conversion, spend).

Stop

- Actions that duplicate existing programmes without adding value.
- KPIs that cannot realistically be monitored or attributed.
- Standalone actions that would work better as combined e.g. sustainability or skills strands.

Start

- Rationalising actions into fewer, outcome-focused priorities.
- Developing clearer baselines data for skills, sustainability and business engagement.

1. Source: <https://www.torbay.gov.uk/council/policies/economic-regeneration/dmp/dmp-vision/>

Annexes

I. Employment in the Visitor Economy

Page 90

ONS Crown Copyright Reserved [from Nomis on 5 December 2025] - Employment Estimates within the Formal Visitor Economy 2024			
Open access	Unmodulated	Visitor Weighting Factor %	Direct Jobs
Industry Code			TT Estimate
55100 : Hotels and similar accommodation	2,250	100%	2,250
55201 : Holiday centres and villages	150	100%	150
55202 : Youth hostels	0	100%	0
55209 : Other holiday and other short-stay accommodation	50	100%	50
55300 : Camping grounds, recreational vehicle parks and trailer parks	400	100%	400
55900 : Other accommodation	20	100%	20
56101 : Licensed restaurants	1,500	20%	300
56102 : Unlicensed restaurants and cafes	800	20%	160
56103 : Take away food shops and mobile food stands	800	20%	160
56210 : Event catering activities	45	20%	9
56290 : Other food service activities	400	20%	80
56301 : Licensed clubs	250	20%	50
56302 : Public houses and bars	1,250	20%	250
49100 : Passenger rail transport, interurban	10	50%	5
49311 : Urban, suburban or metropolitan area passenger railway transportation by underground, metro and similar systems	0	20%	0
49319 : Urban, suburban or metropolitan area passenger land transport other than railway transportation by underground, metro and similar systems	200	20%	40
49320 : Taxi operation	100	50%	50
49390 : Other passenger land transport nec	50	20%	10
50100 : Sea and coastal passenger water transport	15	50%	8
50300 : Inland passenger water transport	0	50%	0
51101 : Scheduled passenger air transport	0	50%	0
51102 : Non-scheduled passenger air transport	0	50%	0
77110 : Renting and leasing of cars and light motor vehicles	50	50%	25
77210 : Renting and leasing of recreational and sports goods	0	50%	0
77341 : Renting and leasing of passenger water transport equipment	0	50%	0
77351 : Renting and leasing of passenger air transport equipment	0	50%	0
79110 : Travel agency activities	50	100%	50
79120 : Tour operator activities	0	100%	0
79901 : Activities of tourist guides	0	100%	0
79909 : Other reservation service activities (not including activities of tourist guides)	40	100%	40
68202 : Letting and operating of conference and exhibition centres	0	100%	0
82301 : Activities of exhibition and fair organizers	30	100%	30
82302 : Activities of conference organizers	0	100%	0
90010 : Performing arts	100	20%	20
90020 : Support activities to performing arts	5	20%	1
90030 : Artistic creation	15	20%	3
90040 : Operation of arts facilities	0	20%	0
91020 : Museum activities	10	100%	10
91030 : Operation of historical sites and buildings and similar visitor attractions	10	100%	10
91040 : Botanical and zoological gardens and nature reserve activities	250	100%	250
93210 : Activities of amusement parks and theme parks	35	100%	35
93290 : Other amusement and recreation activities	150	50%	75
92000 : Gambling and betting activities	150	20%	30
93110 : Operation of sports facilities	250	20%	50
93199 : Other sports activities (not including activities of racehorse owners)	10	20%	2
Column Total	9,445		4,623
		FTE Total	2,126

1. The table shows the SIC codes relating to the visitor economy, together with a weighting, that derive the direct jobs figures presented on Page 14.

II. Policy Maps and Detailed Evidence

Torbay / English Riviera Documents			
Date Created / Published	Title	Alignment	URL
Policy & Strategy Documents			
Tourism or Visitor Economy Strategies or Plans			
2025	ERBID Consultation Document 2027-2031	- Places the visitor economy at the heart of Torbay’s future and committing to sustained, strategic investment in destination marketing, product development and partnership working. - It supports the DMP’s ambition to re-establish the English Riviera as a leading coastal destination by driving higher-value, year-round tourism, strengthening the brand, and ensuring activity is informed by data and market insight. Both frameworks emphasise sustainability, accessibility, collaboration and innovation, with the DMP setting the long-term strategic direction and the ERBID providing the practical funding and delivery mechanism needed to achieve a more competitive, resilient and well-managed visitor economy.	PDF ONLY
Other economic development-related plans			
2022	Torbay Economic Growth Strategy 2022-2030	- Recognises the visitor economy as a core pillar of Torbay’s prosperity and creating the wider conditions needed for its success. It supports the DMP through commitments to infrastructure and town-centre improvements, skills development, business innovation, sustainability and place-brand enhancement. - The Economic Growth Strategy offers a broad economic framework—ensuring investment, planning and regeneration activity reinforce and enable a more competitive, resilient and high-value visitor economy for the English Riviera.	https://www.torbay.gov.uk/council/policies/economic-regeneration/economic-growth-strategy/
Leisure, recreation and/or tourism-led regeneration projects			
2025	Torbay Food Strategy 2025-2030	- Enhances one of the destination’s most influential visitor touchpoints—its food culture. It supports the DMP’s goals by improving product quality, strengthening sustainability, promoting community wellbeing, reinforcing place identity and elevating the visitor experience. - By fostering resilient local supply chains, supporting hospitality businesses and encouraging food-led events and experiences, the Food Strategy contributes directly to a more competitive, sustainable and vibrant visitor economy that mirrors the DMP’s long-term vision for the English Riviera.	https://www.torbay.gov.uk/council/policies/health/torbay-food-strategy-202530/
2021	English Riviera (Outdoor) Events Strategy 2021-2027	- Uses high-quality, well-managed outdoor events to strengthen the visitor experience, animate the destination, and drive sustainable economic growth. Both strategies prioritise enhancing Torbay’s distinctiveness, improving product development, and creating a vibrant year-round offer that boosts demand and supports local businesses. - The Events Strategy directly supports the DMP’s ambitions for resilience, inclusivity, accessibility and sustainability by encouraging collaborative delivery, activating public spaces, extending the season, and attracting diverse audiences. Together, they reinforce the English Riviera’s positioning as a dynamic, competitive coastal destination and contribute to a stronger, more resilient visitor economy.	https://www.torbay.gov.uk/democraticservices/documents/s112183/Events%20Strategy%20Appendix.pdf
2020	Torbay Heritage Strategy 2021-2026, Part 1 - Adopted	- Positions Torbay’s rich heritage assets as key drivers of a distinctive, high-quality visitor experience and engines of sustainable economic growth. Emphasises the importance of enhancing the destination’s unique identity, developing compelling products, and improving the overall sense of place to attract diverse audiences and strengthen Torbay’s competitive edge. - Supports the DMP’s focus on resilience, inclusivity and community benefit by promoting conservation, interpretation, and greater public engagement with heritage, while encouraging collaboration across cultural, tourism and community partners. By elevating heritage as a cornerstone of the English Riviera’s offer, the strategy directly contributes to a vibrant, sustainable visitor economy and reinforces the long-term vision set out in the DMP.	https://www.torbay.gov.uk/council/policies/planning-policies/local-plan/torbay-heritage-strategy/
2020	Torbay Heritage Strategy 2021-2026, Part 2 - Adopted	- Translates Torbay’s heritage ambitions into practical actions that strengthen the visitor experience, enrich the destination’s identity, and support sustainable economic growth. - While the DMP emphasises product development, distinctiveness, partnership working and wise growth, Part 2 of the Heritage Strategy delivers these through targeted projects that improve access, interpretation and the quality of heritage sites; foster collaboration across cultural and tourism partners; and activate heritage as a year-round asset that attracts diverse audiences. - By enhancing the authenticity, vibrancy and resilience of Torbay’s cultural offer, the strategy reinforces the DMP’s goals of creating a compelling, high-quality coastal destination that benefits both visitors and local communities, bolstering the wider visitor economy.	https://www.torbay.gov.uk/council/policies/planning-policies/local-plan/torbay-heritage-strategy/

Other relevant documents			
2023	Geopark Management Plan 2023-2033 Part 1	- Positions the UNESCO Global Geopark as a cornerstone of the English Riviera’s distinctiveness, sustainability and long-term visitor appeal. - The plan prioritises the visitor economy by protecting and enhancing Torbay’s internationally significant natural heritage, improving interpretation, access and educational value, and fostering high-quality, low-impact experiences that resonate with modern traveller expectations—directly supporting the DMP’s focus on sustainability, resilience, inclusivity and product development. - Through strong partnership working, community engagement and an emphasis on responsible stewardship, the Geopark plan reinforces the DMP’s ambition to create a vibrant, well-managed coastal destination where natural heritage, visitor experiences and local benefit are balanced and mutually reinforcing, ultimately strengthening the area’s competitiveness and the wider visitor economy.	https://www.englishrivierageopark.org.uk/documents/Geopark_ManPlan_2023_Pt1_FINAL_Low_Res_23_03_13.pdf
2023	Geopark Management Plan 2023-2033 Part 2	- Interprets the Geopark’s strategic ambitions into practical actions that enhance Torbay’s natural heritage offer, enrich visitor understanding, and support sustainable growth of the visitor economy. - Through targeted projects focused on interpretation, conservation, access improvements, education, community engagement and responsible tourism, Part 2 strengthens the quality and distinctiveness of the visitor experience—key priorities of the DMP. Its emphasis on sustainability, inclusivity and partnership mirrors the DMP’s commitment to wise growth, collaborative delivery and resilience, ensuring the UNESCO Global Geopark remains both a protected landscape and a vibrant, year-round asset that underpins Torbay’s identity and competitiveness as a leading coastal destination.	https://www.englishrivierageopark.org.uk/documents/Geopark_ManPlan_2023_Pt2_FINAL_Low_Res_23_03_13.pdf
2023	Community and Corporate Plan 2023-2043	- Sets the long-term conditions that enable a thriving, resilient and high-quality visitor economy. Provides a broad framework for creating a prosperous, welcoming and well-managed Torbay. Its priorities—such as improving infrastructure, fostering community wellbeing, promoting sustainable development, strengthening partnerships and building economic resilience—directly support the DMP’s ambitions for wise growth, inclusivity, accessibility and a vibrant place to live, work and visit. - By prioritising a cleaner, safer, more connected and more confident Torbay, the plan underpins the DMP’s vision for a competitive coastal destination with a strong visitor economy that delivers long-term benefits for residents, businesses and communities.	https://www.torbay.gov.uk/council/policies/corporate/corporate-plan/
2023	Greener Way for Our Bay	- Places sustainability, environmental stewardship and climate resilience at the heart of Torbay’s long-term prosperity—principles that directly support a high-quality, future-proofed visitor economy. - By focusing on carbon reduction, biodiversity, coastal protection and improved access to green spaces, it supports the DMP’s goals of wise growth, high-quality visitor experiences and responsible destination management. It ensures Torbay’s natural assets are protected, attractive and resilient, helping secure a competitive, sustainable and appealing coastal destination for both visitors and residents.	https://www.torbay.gov.uk/council/greener-way-for-our-bay/
Best Practice Examples			
2025	Torbay Story Toolkit (BEST PRACTICE)	- Strengthens the English Riviera’s identity, narrative and market positioning—core elements of a competitive visitor economy. - By providing a unified story, visual language and messaging framework for partners, the Toolkit enhances destination branding, supports consistent promotion and helps showcase Torbay’s strengths, character and ambition. This directly reinforces the DMP’s priorities around improving marketing impact, celebrating distinctiveness, inspiring collaboration and attracting diverse audiences. Together, they ensure Torbay presents a compelling, cohesive and confident identity that elevates the visitor experience and supports sustainable growth across the wider destination.	https://torbaystory.co.uk/toolkit

South West Focus Documents			
Date Created / Published	Title	Alignment	URL
Policy & Strategy Documents			
Tourism or Visitor Economy Strategies or Plans			
2025	Devon & Partners LVEP Growth Plan (2025-2026) Core Early Priorities Identified in the Destination Management Framework (DMF)	• Focuses on priorities that strengthen coordination, enhance destination competitiveness and support sustainable growth across the region's visitor economy. • • Its emphasis on improving data and insights, streamlining governance, developing high-quality visitor products, and boosting regional marketing impact directly reflects the DMP's priorities around evidence-led planning, collaboration, product development and wise growth. • • By promoting accessibility, sustainability and stronger partnerships between local, regional and national bodies, the LVEP Growth Plan reinforces the DMP's vision of a well-managed, resilient and distinctive English Riviera that benefits both visitors and the wider community.	https://www.visitdevon.co.uk/devon-and-partners-lvep/devon-and-partners-lvep-growth-plan/growth-plan-2025-2028/
2024 Page 93	Towards 2030 Working Together to build a stronger visitor economy in the South West - The Great South West Tourism Partnership Prospectus	• Champions a coordinated, strategic approach to strengthening the region's visitor economy—directly supporting the DMP's ambition for a more competitive, resilient and sustainable English Riviera. • • The Prospectus prioritises regional collaboration, investment in skills, infrastructure and sustainable tourism, and a stronger, more unified voice for the South West—actions that complement the DMP's focus on data-driven decision-making, product development, accessibility, partnership working and wise growth. By advocating for shared priorities and increased national recognition and funding, the Prospectus reinforces the DMP's goals and helps create the wider conditions needed for Torbay to thrive as a leading coastal destination.	PDF ONLY
Other relevant documents			
2025	Devon and Torbay Local Growth Plan	• Recognises the visitor economy as a key driver of local prosperity and sets out the broader economic conditions needed for a thriving, competitive English Riviera. • Its focus on improving infrastructure, skills, business support, sustainability, and place-making, directly complements the DMP's priorities around enhancing the visitor experience, strengthening destination identity, fostering wise growth, and ensuring coordinated delivery across partners. • By supporting investment, promoting innovation and enabling resilient, inclusive economic development, the Local Growth Plan reinforces the DMP's ambition to create a vibrant, well-managed coastal destination where tourism contributes meaningfully to long-term community and economic wellbeing.	https://democracy.devon.gov.uk/documents/s51923/Devon%20and%20Torbay%20LGP%20-%20Appendix%201%20-%20Draft%20-%20FINAL%201.pdf

III. Review of Existing DMP

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Destination Development – Growth Priority Theme 1: Food and Drink						
High Level Action	Detailed Actions	KPIs	Lead Partner	Supporting Partners	Comments on Actions	Comments on KPIs
1. Sustainable Food and Drink Destination	Revive the ERBID food and drink focus group, explore options to work with the Devon Food Partnership and Sustainable Food Place award.	Food & drink focus group revived & 1 meeting held	ERBIDCo	Private Sector ERUGGp Torbay Council	Torbay has achieved the Sustainable Food Place award as part of a wider piece of work led by LocalMotion Torbay.	KPIs with this action are mostly aligned with the Seafood FEAST leading to duplication. Actions have been achieved, but changes with organisations presents a challenge with capturing data on sustainable practices in Torbay. Could be an opportunity to develop this with more focus to increase these opportunities.
	Focus on initiatives to promote local producers/ businesses to ‘taste the English Riviera and UNESCO Global Geopark, reduce food waste, sustainability and improve local supply chains. Develop appropriate support tools for businesses.	1 initiative			Aligned with the Seafood Feast	Also aligned with the Torbay Sustainable Food Places Award. Data is mostly narrative and is likely not to be provided moving forward.
	Increase food and drink experiences, including pop ups, try me, making, tasting and cookery experiences	10 new food experiences introduced			Aligned to the Seafood Feast Some overlap with previous and next actions	Also aligned with the Torbay Sustainable Food Places Award. Data is mostly narrative and is likely not to be provided moving forward.
2. Relaunch Seafood Feast as a signature event	The September food event should become a signature event in the destination calendar. Increase annual visitor footfall, overnight stays and spend.	1 event 10 new food experiences 20 venues taking part	ERBIDCo	Private Sector Torbay Council	Event continues to be popular and promotes food and drink within the area.	KPIs exceeded. The KPI is SMART, and data is supplied through ERBID. The question is whether this action is located in the right space or whether it should be associated with Culture and Events?
3. Inspiring Dining	Enable inspiring dining spaces through mixed use town centre regeneration projects to create special and unique places to eat and drink with a focus on quality and local.	Linked to Town’s Fund	Torbay Council	Private Sector	Activity not started.	This KPI is challenging to monitor as activity has yet to take place and so no KPI has been associated with it. Data supplied is around the progress of the activity taking place and ensuring that consideration is taken place with regards to the visitor economy.

DMP Review Process:

- 1. Initial review conducted by Tomorrow’s Tourism.
- 2. Review comments provided to Elizabeth Devonport, Torbay Council.
- 3. Additional comments submitted by ED.
- 4. Final review incorporates ED comments, alongside relevant feedback from Tomorrow’s Tourism shown in shaded columns entitled ‘Comments on Actions’ and ‘Comments on KPIs’

Each Action has been given a status update by Torbay Council to understand the progress of the activity, using the following descriptions:

-  **Green** – On Target (in play and achieving targets)
-  **Amber** – Behind Target, but Still Achievable (may not achieve this quarters targets but should achieve annual targets)
-  **Red** – Behind Target and At Risk (unlikely or unable to achieve targets)
-  **Grey** – Not Applicable (Activity has not started yet / Will not start this year)

Destination Development – Growth Priority Theme 2: On and In the Water						
High Level Action	Detailed Actions	KPIs	Lead Partner	Supporting Partners	Comments on Actions	Comments on KPIs
4. Water sports Hub Development	Ensure new facilities and sports events are sustainable with a low carbon impact and interpret the Geopark and align to the Torbay Story messaging.	Action plan for delivery (to be scoped).	Torbay Council	Tor Bay Harbour Authority, TDA, ERUGGp	The original action was reviewed - the market has responded to the water sport activity opportunities in Torbay sufficiently (organisations are already looking to develop a water sports hub). Focus was shifted to provide support and encourage and promote the offer available. It is proposed to remove this action.	Action shifted to supporting businesses as a main point of enquiry especially with the SUPHub work. Other activity occurring across the Council with regards to the Blue Economy so it would be good to review this in relation to Torbay on the Move and future work to support alignment.
5. Business Development	Enable on and in the water/water sports development by supporting businesses to establish themselves and grow. Alignment to Carbon Neutral Torbay and UNESCO Global Geopark.	No. businesses supported (to be scoped)	Torbay Council	Private Sector	Business support available to all businesses. An innovation event supported the start of the SUPHUB group combining businesses with local organisations and people to make Torbay the SUP capital of the UK. Action reviewed by chair of DMG and Torbay Council– suggestion to change this action to “Encourage and promote a wide offer of water sports activity in Torbay”	Activity has taken place despite no KPIs being identified. Data is being supplied, similar to one above (may wish to combine?).
6. Packaging On/In the Water Experiences	Develop ‘On and in the Water’ experiences for distribution through new and established channels.	3 new experiences introduced	ERBIDCo	Private Sector, Meet English Riviera	Torbay has hosted the ER SUP Championships and will be hosting the 2026 World Cup. On and In the water experiences have been included on the ER website.	This has been achieved and is easy to monitor through partner engagement, however, there is a question of whether we need new experience or to grow these events so they support businesses as there is lots of activity already taking place. Could be something to work with organisations and groups to capture more information on events and grow.

Destination Development – Growth Priority Theme 3: UNESCO Global Geopark						
High Level Action	Detailed Actions	KPIs	Lead Partner	Supporting Partners	Comments on Actions	Comments on KPIs
7. Geopark Interpretation	Aligning to the Torbay Heritage Strategy & Heritage Interpretation Framework.	Review of Strategies	ERUGGp	Torbay Council, ERBIDCo, Private Sector	Ongoing and aligned as per the Geopark 10-year Management Plan	More of an awareness piece which is continuously ongoing and already taking place. Partner provides updates so achievable with regards to data, but may not be needed as this is something they have ongoing responsibility for.
	Integrate UNESCO Global Geopark into more products, experiences, visitor information and support businesses with creative storytelling and visual branding.	Action plan for delivery No new products & experiences			Ongoing activity - ERUGGp discovery experiences have been created with businesses	Clearly lots of work being done, but unclear if there is a specific action plan for this (aligns well with the action plan in The Geopark Management Plan 2023-33 - Part 2). Activity has and is taking place with new experiences and products developed. No number was identified and this does align with a different action. Data supplied is proved from partners.
	Explore options to further engage with businesses to develop ideas, such as simple toolkits and workshops.	No businesses engaged			Something that is being developed through the terafirma project	KPI could evolve to also look at the number of toolkits/workshops created/undertaken. Baseline number of businesses to provide target/monitoring.
	Explore developing Geopark Ambassadors to help tell the story of the Geopark while supporting the visitor welcome.	2 business ambassadors			Something which is being explored as part of the terafirma project. Latest update: Ambassadors scheme for community volunteers currently on hold without resources to manage it	This action has taken place with businesses engaging and becoming partners/associate partners over the last couple of years. Questions could be raised on the KPI to be higher or look at what these businesses are doing to support the Geopark. This could be fed back by Partner if agreed.
8. Digital Geopark Trails	Develop options and implement digital trails for use on mobile devices with integrated interpretation.	1 project plan created	ERUGGp	ERBIDCo	Developed as part of the ERUGGp Discovery Experiences	Project has been undertaken with a couple of digital trails available online as well as a series of other discovery experiences. The launch of the Geopark Discovery Trails replaced plans for the original digital trails. Data is available on the number of the discovery experiences, but if we could collect more data on the information, that would be beneficial.
9. Designated Landscape Partnerships	Explore opportunities to work with other designated landscapes across the South West to promote the collection of unique landscapes and monuments.	Partnership established	ERUGGp		This activity is continuing to take place with ERUGGp being active within the Local to Global NLHF project and as part of the SW UNESCO group.	Activity is currently taking place with funding acquired to promote the South West designated landscapes. Partnership has been established, but the KPI doesn't demonstrate the development of the group - could be an opportunity here.

Destination Development – Growth Priority Theme 4: Culture and Events						
High Level Action	Detailed Actions	KPIs	Lead Partner	Supporting Partners	Comments on Actions	Comments on KPIs
10. Thematic Interventions	Undertake a critical appraisal of current programming against the aims of this DMP and the thematic framework to identify signature events across the three towns to strengthen the cultural offer to attract new visitors.	1 Critical appraisal completed	Torbay Council	ERBIDCo, Torbay Culture	A review of Torbay events takes place, with several key events established.	A review/critical appraisal of the activity each year is important (potentially change for annual review). Data is provided, but there could be opportunity to develop this further for the different events (topline numbers/figures/data captured for the different events or activities).

Destination Development – Marketing Task 1: Markets, Positioning and Branding						
High Level Action	Detailed Actions	KPIs	Lead Partner	Supporting Partners	Comments on Actions	Comments on KPIs
1. Market Research	Primary research among leisure visitor and non-visitors to explore current brand perceptions and associations, names, places, and straplines.	Market research completed	ERBIDCo	DMG	Marketing is aligned with the DMP target audiences and growth themes.	Some research has taken place, but wasn't something planned for the current year. KPI may need to expand/change with the idea that this can be developed.
2. Brand Strategy Review	Informed by the findings of the market research, engage stakeholders, review and update branding strategy and marketing assets.	Brand strategy review completed	ERBIDCo		Activity has yet to take place but current branding is available. Brand Strategy Review not yet undertaken due to lack of funding.	Some research has taken place, but wasn't something planned for the current year. KPI may need to expand/change with the idea that this can be developed.
	Consider producing brand toolkits for businesses to adopt. Reconfigure marketing collateral and channels accordingly.	Action plan for delivery			Toolkits have been developed and continue to be shared with businesses and through various channels.	
3. Marketing Strategy Review	Review the marketing strategy and update accordingly to the themes and target segments in the DMP. Review and refine messaging/activity where appropriate.	Market strategy review completed Action plan for delivery	ERBIDCo		Marketing is aligned to DMP themes and target audiences. Marketing Strategies produced 2023, 2024, new Marketing Agency appointed end 2024	Connects ERBID's marketing schemes with the DMP and helps with monitoring the ongoing progress. Data is supplied by partner. Narrative based rather than numbers.

Destination Development – Marketing Task 2: Destination Management						
Priority Task	Detailed Actions	KPIs	Lead Partner	Supporting Partners	Comments on Actions	Comments on KPIs
4. Policy Review	Review the Local Plan and prepare supplementary planning documents to assist in transition of redundant accommodation.	Review stock of serviced accommodation and update local plan including supplementary planning documents	Torbay Council		This hasn't taken place yet.	Useful KPI to understand business stock and other planning activity. Usable data is being supplied, but it would be beneficial to improve this.
5. Joint Response to Visitor Surveys	Undertake a review exercise across delivery teams to plan actions that address the findings of visitor surveys.	Review annual survey and create action plan	ERBIDCo	DMG, Torbay Council	Annual survey is reviewed and discussed at DMG. Feedback creates actions which are taken forward by the relevant partner.	The review of the annual survey is really beneficial, but there needs to be a movement to the use of the next steps. Data is being supplied through the DMG, but updates of next step should be included.
6. Public Realm Improvement	Further develop public realm improvement plans for visitor areas. Focus on Brixham Harbourside and Torquay Inner Harbour to complement and enhance improvements around the Strand.	No. public realm improvements delivering (review annually)	Torbay Council	Tor Bay Harbour Authority	Narrative is provided rather than number, but provides more information about the projects.	Beneficial with a series of public realm improvements currently developed and planned for the future. Data is being supplied - could be more quantifiable rather than qualitative.
7. Bus Network Improvement	Explore options to name the visitor routes and align to the Geopark story e.g. 'The English Riviera Route.'	Options appraisal completed. Action Plan for delivery.	Torbay Council	ERBIDCo, Transport Providers, ERUGGp	Updates provided from operational lead on the activity which is taking place	Aligns with other work around bus network improvements as well as branding alignment. Data is being supplied, KPI could be changed to be more aligned with the activity taken place. Also broadened to include transport networks as a whole (not just buses, but also trains etc.)
8. Cruise Development	Develop shore excursions and tailor-made experiences for cruise operators which relate to the development themes of this DMP.	No. new excursions	Tor Bay Harbour Authority	ERBIDCo	Narrative provided on this activity rather than no. new excursions focus has been on the number of cruises ships booked.	Data is being supplied, activity is taking place. Focus has been on the number of cruise ships coming in - could be that this is the KPI focus moving forward rather than excursions? Easier to track and monitor?
9. Green Tourism for business	Explore options and encourage businesses to achieve the Green Tourism Award (or other zero/carbon neutral programmes), aligning to Carbon Neutral Torbay, to showcase exemplars of good practice and supporting the overall reputation of the destination.	Options appraisal completed. Action plan for delivery created. No. Business engaged.	DMG	Torbay Council, Torbay Climate Partnership, ERUGGp, Private Sector, ERBIDCo, Torbay Place Leadership Board	This activity is taking place this year (25/26). Appraisal and action plan for delivery has been created.	Aligned with the following action - focus is on supporting businesses with becoming more sustainable and aligning with activity.
10. Carbon Neutral Torbay	Explore the options to align Carbon Neutral Torbay with the UNESCO Glasgow Declaration on Climate Change as a commitment to a more sustainable visitor economy.	To be scoped	DMG	Torbay Council, Torbay Climate Partnership, ERUGGp, Private Sector,	This activity aligns with the A Greener Way For Our Bay action plan. Aligned to action above with regards to delivery etc.	These actions could be combined to focus on one KPI with an underlying focus on sustainability moving forward. Data can be supplied, but not needed.

Destination Development – Marketing Task 2: Destination Management (continued)

Priority Task	Detailed Actions	KPIs	Lead Partner	Supporting Partners	Comments on Actions	Comments on KPIs
11. Education Business Plans for Tourism	Annual plan for business engagement in education supporting career pathways for young people.	No. business engaged & no. young people engaged in tourism related courses	SDC	Private Businesses	Often combined with the action below - numbers have been provided on the tourism courses.	Suggestion could be that these actions are combined into one or a series of skills actions. Data is being supplied with numbers and narrative. It would be good to evaluate these with skills providers and business needs to identify new KPIs which can be measured.
12. Workforce Skills	Annual plan to increase business engagement to improve the skills of the workforce (and the unemployed) through take up of programmes.	No. businesses engaged & no. people engaged in skills improvement programmes	SDC	Private Businesses, Torbay Council	Often combined with the action above - numbers have been provided.	See above
13. Annual Performance Review	Deliver a number of annual surveys to review destination performance.	Delivery of 2 surveys	ERBIDCo		Surveys are delivered on an annual basis and feedback is discussed by the DMG.	One survey for the annual review is beneficial and data is supplied, but it would be beneficial to look at how we use the survey.
14. Meet English Riviera	Develop activity to support conference sales and marketing activity over the life of the DMP.	£2M worth of Conference Bookings	Meet English Riviera		The value is over the life of the plan with currently value of enquiries around £5.8 million.	Focus could be on the value of enquiries rather than the amount of conference bookings (as this is easier to capture by partners). Other elements currently being captured is number of appointments, no. contracts made, estimated value overall and for Torbay.

Destination Development – Marketing Task 3: Delivery, Organisation and Resources

Priority Task	Detailed Actions	KPIs	Lead Partner	Supporting Partners	Comments on Actions	Comments on KPIs
15. DMG Terms of Reference and Annual Review	Includes terms of reference, membership, responsibilities for actions, progress monitoring via a data dashboard and resourcing plans.	ToR & Annual Review completed	Torbay Council	DMG	An annual report was created for the DMG to review alongside quarterly reports to review progress and update on activity. Discussion from the group usually shapes the focus of actions or the next quarter's discussion.	This KPI works as part of the governance, but should be reviewed with regards to future governance. The approach is simple and effective, but is there something more with regards to governance to ensure that delivery will be successful?

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