tomorrow's TOURISM

Torbay Destination Management Plan Review

BASELINE REPORT

Evidence Base

5th February 2026

TORBAY COUNCIL

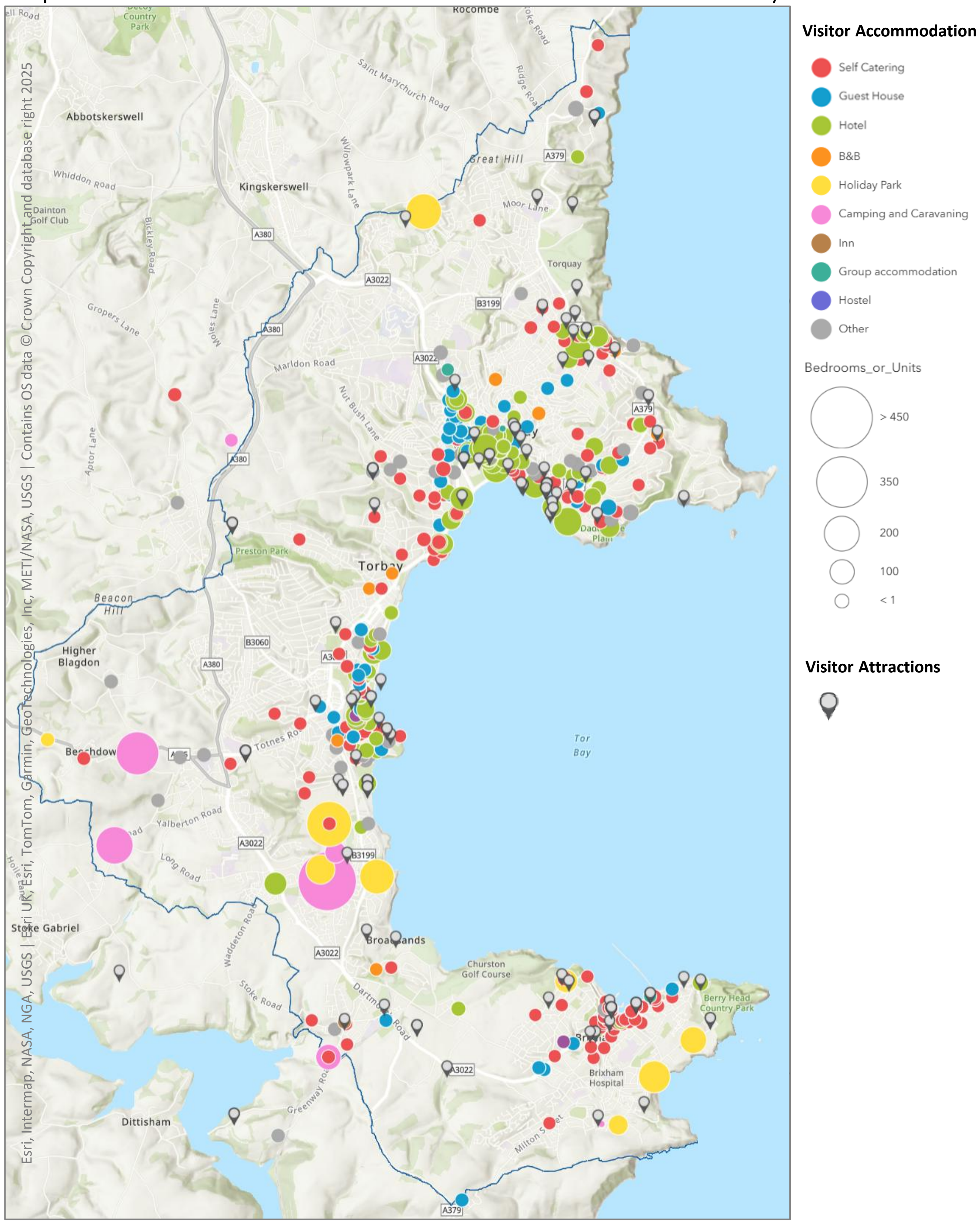
Contents

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.

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

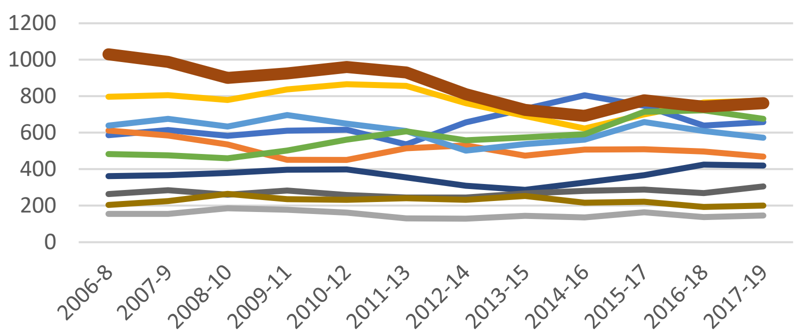


Figure 1. Volume - Overnight Trips (000)

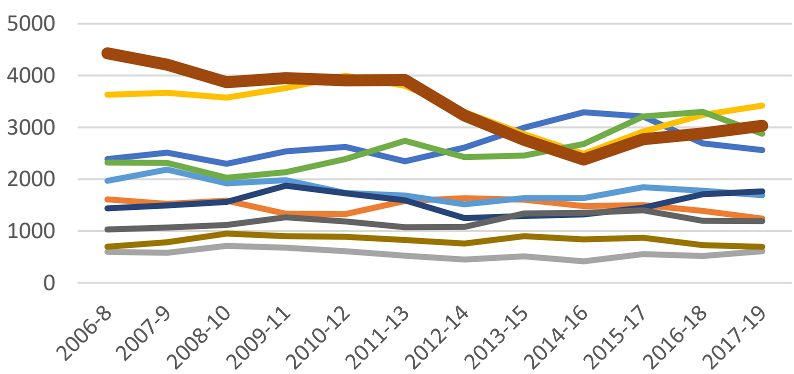


Figure 2. Nights (m)

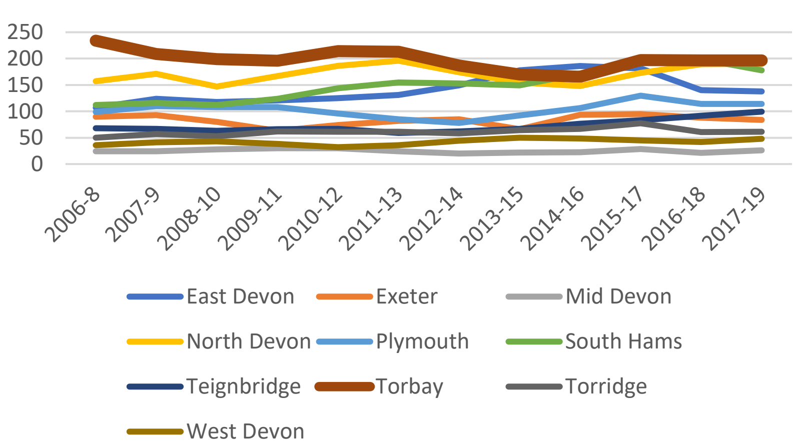


Figure 3. Overnight Spend (£m)

2021-2023 Annual Average

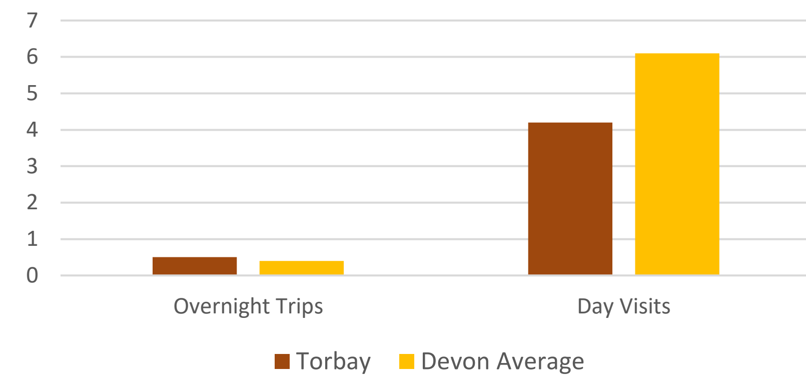


Figure 4. Volume (m)

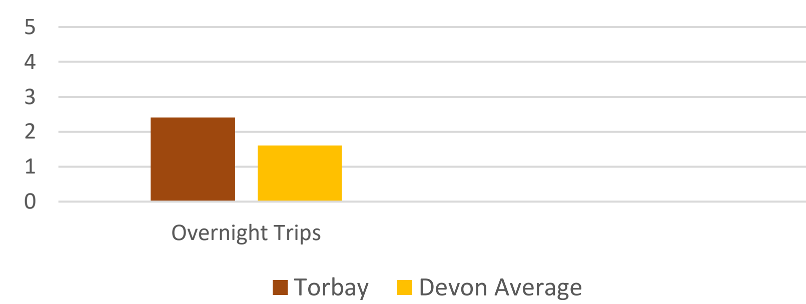


Figure 5. Nights (m)

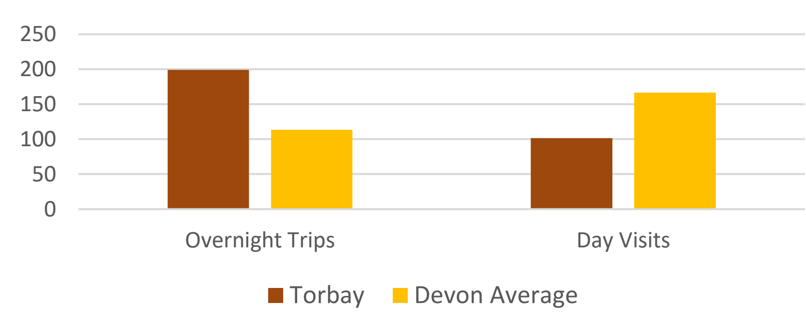


Figure 6. Spend (£m)

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 2021-2023[1]

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

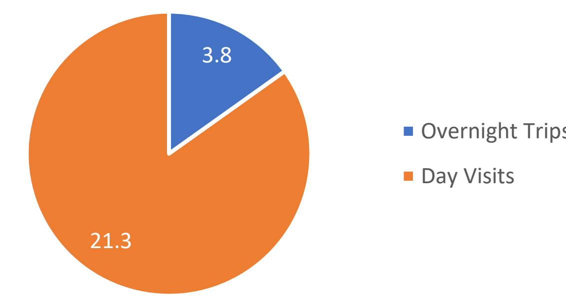


Figure 8. Value (£m) of Visits to Devon 2024

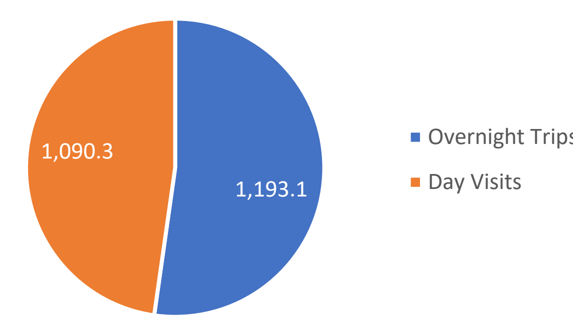
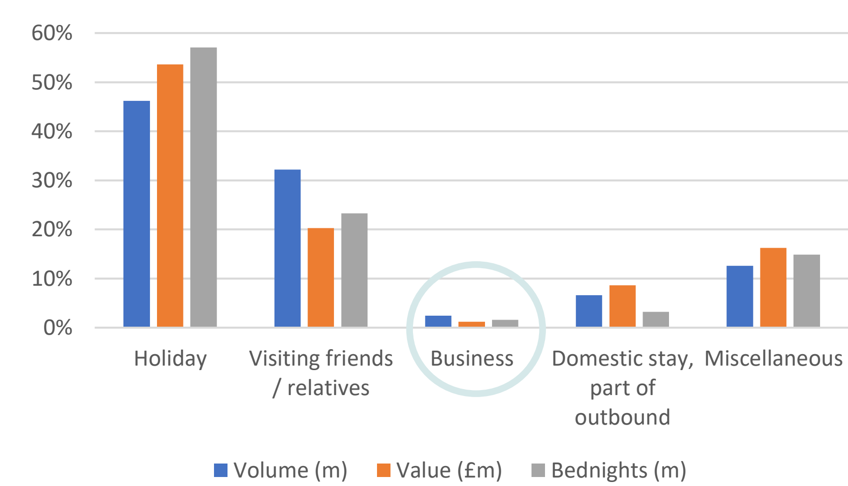


Figure 9. Domestic Overnight Trips by Purpose to Devon 2024



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+' (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.

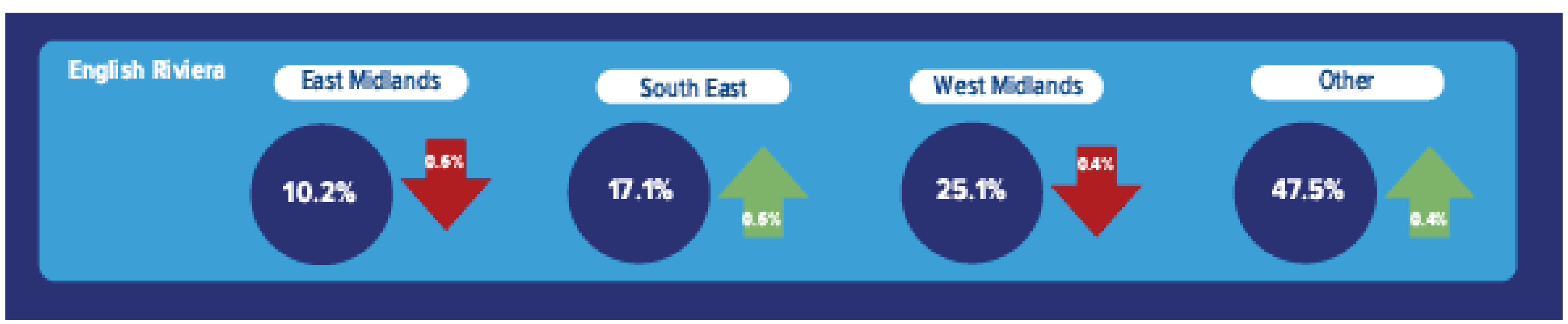
ERBID Visitor Survey 2025

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 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

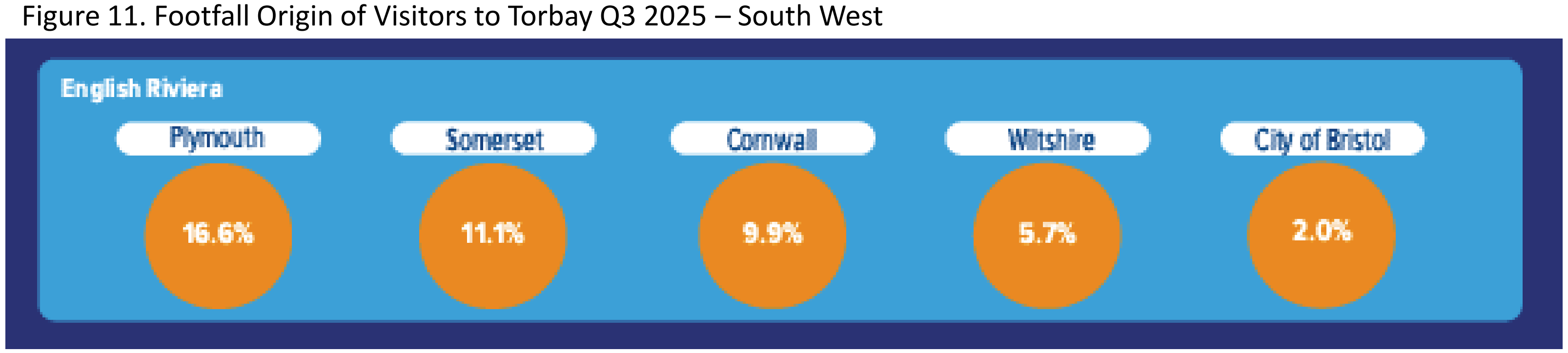
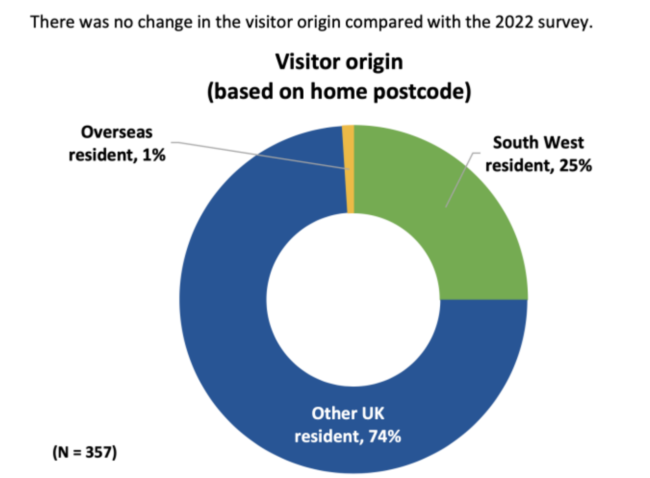


Figure 12. Visitor Origin from 2024 Visitor Survey [2]



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%			

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. 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

1.3 Visitor Volumes, Value & Impact – International / Inbound

Figure 13. Inbound Visits (000)

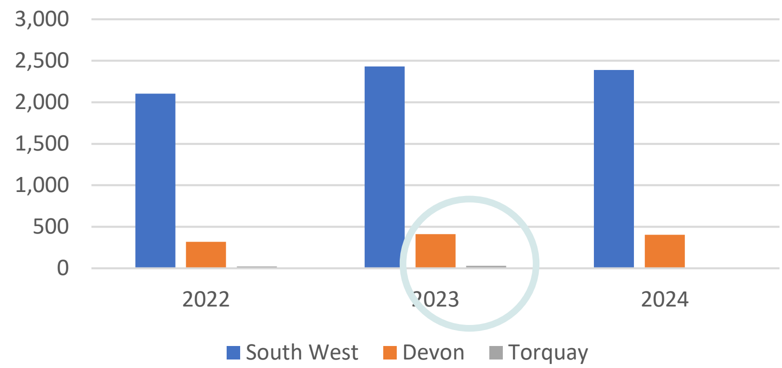
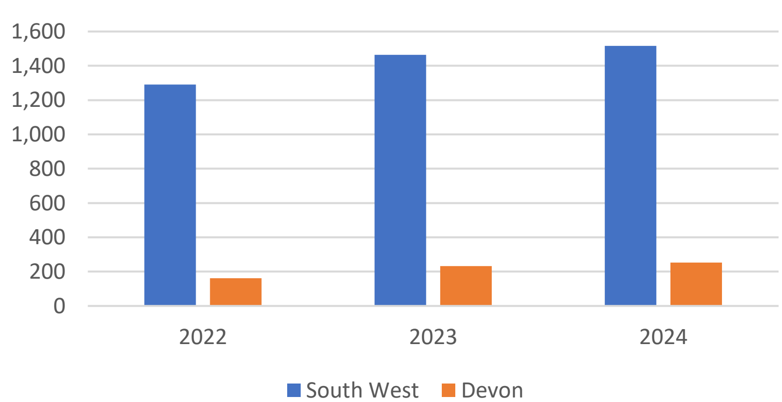


Figure 14. Inbound Nights (000)

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

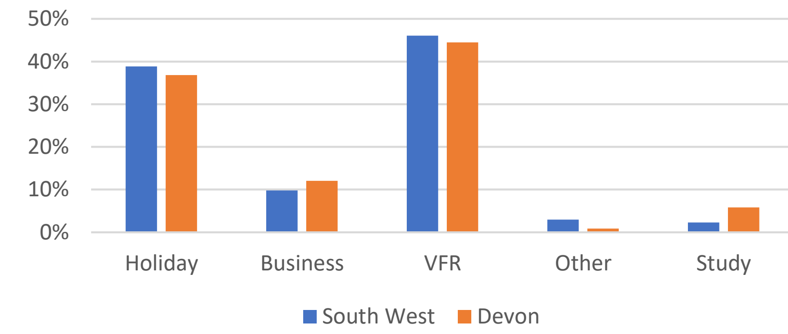


Figure 17. Purpose of Inbound Visits 2024
% of Nights

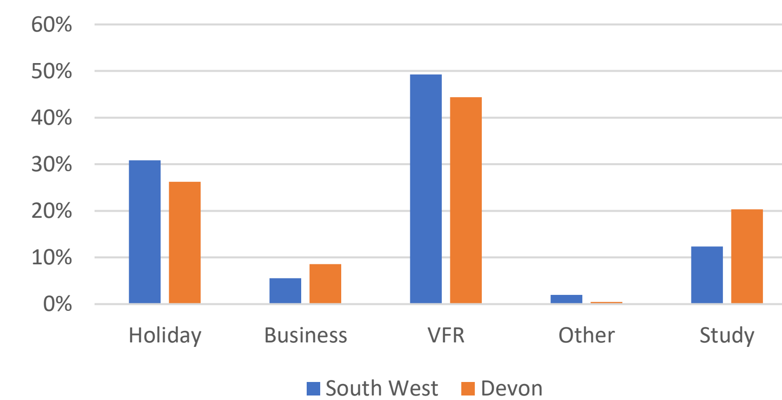
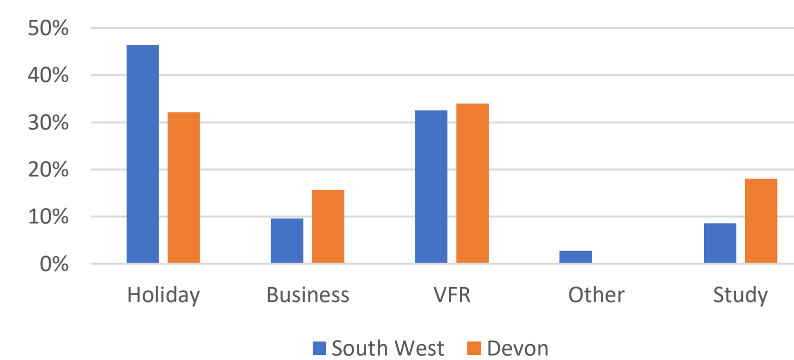


Figure 18. Purpose of Inbound Visits 2024
% of Spend



1. Source: International Passenger Survey (IPS)

1.3 Visitor Volumes, Value & Impact – International / Inbound

Torbay Markets for Short-term Lets

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 2022[2]

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 2024[1]

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 , 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

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.

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. 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

1.5 Seasonal Profile of Domestic Visits to Devon

1. Domestic tourism activity in 2024 shows a clear seasonal pattern across both overnight trips and day visits to Devon. [1]

2. 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.

3. 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).

4. 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.

Figure 19. Overnight Volume 2024 (m)

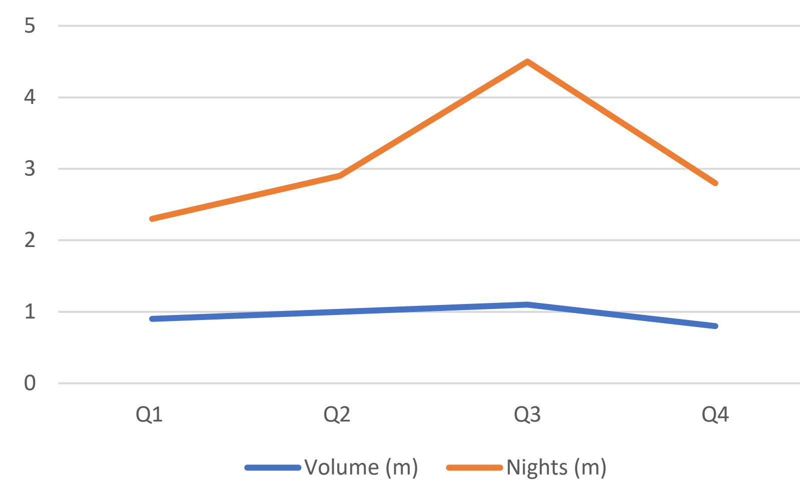


Figure 20. Overnight Value 2024 (£m)

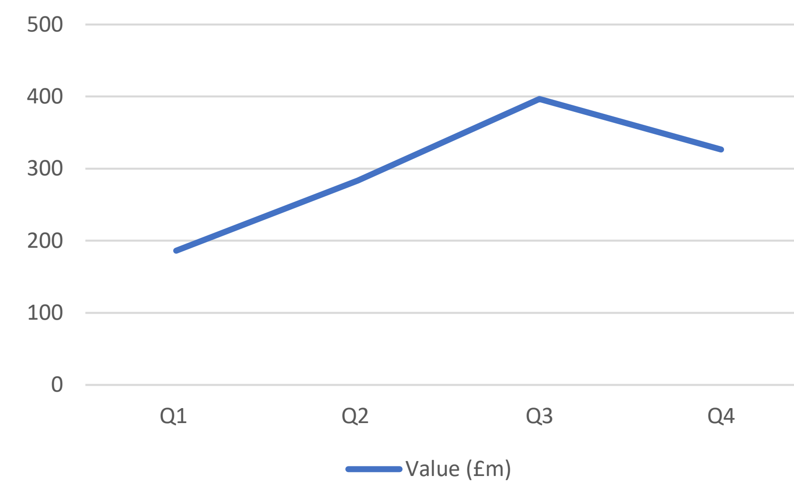


Figure 21. Day Visit Volume 2024 (m)

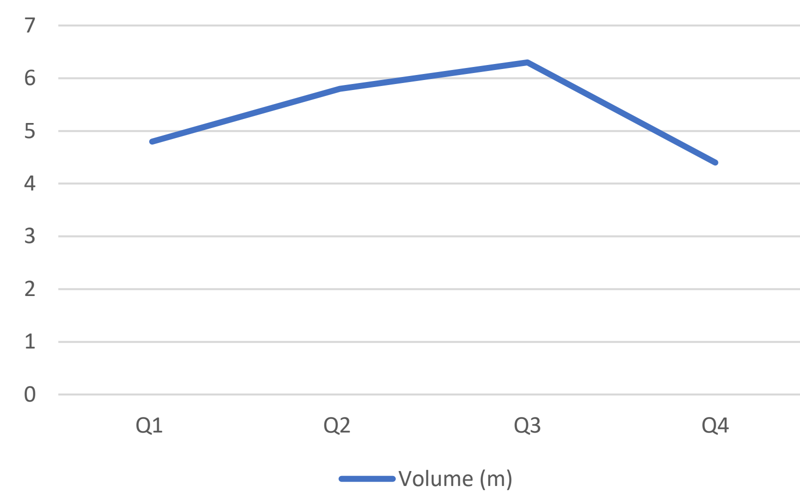


Figure 22. Day Visit Value 2024 (£m)

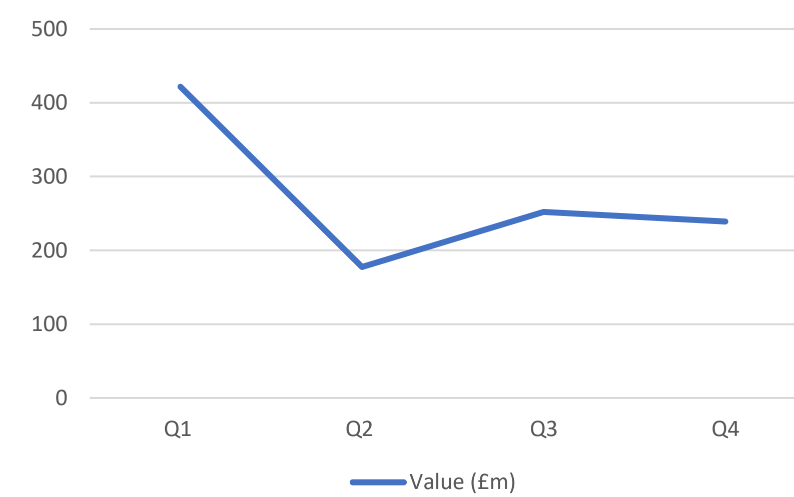
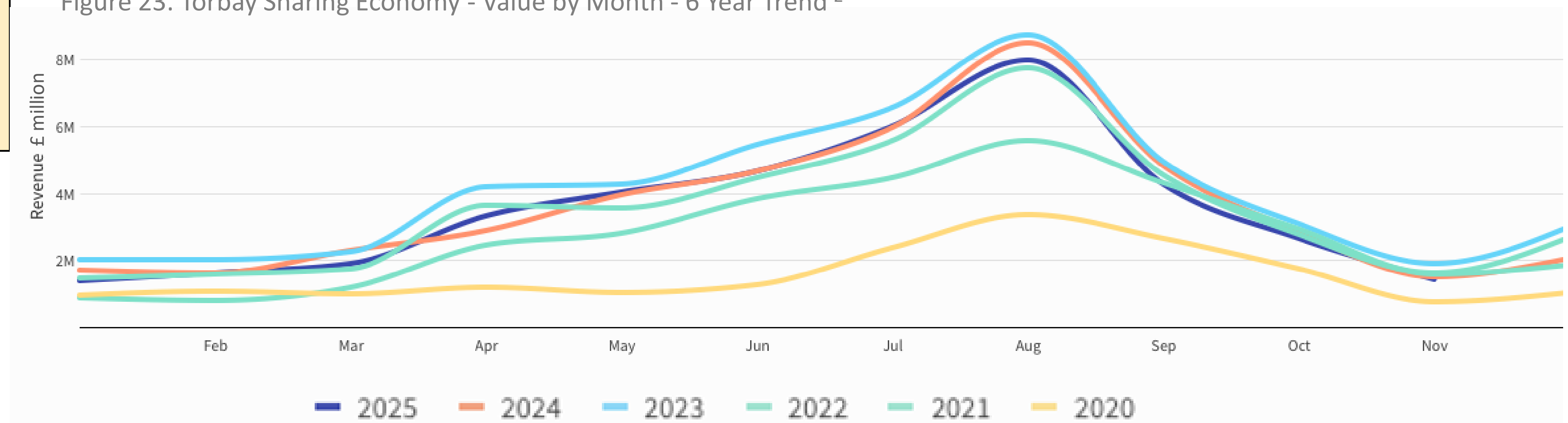


Figure 23. Torbay Sharing Economy - Value by Month - 6 Year Trend [2]



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

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.

> **2026: The year of holidaying at home?**[4]
>
> Four in ten intend to reduce their global travel plans or refocus on domestic trips in 2026. If it's too expensive to go to classic destinations like Italy or France, holidaymakers may turn to other kinds of holidays such as domestic city breaks.

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]

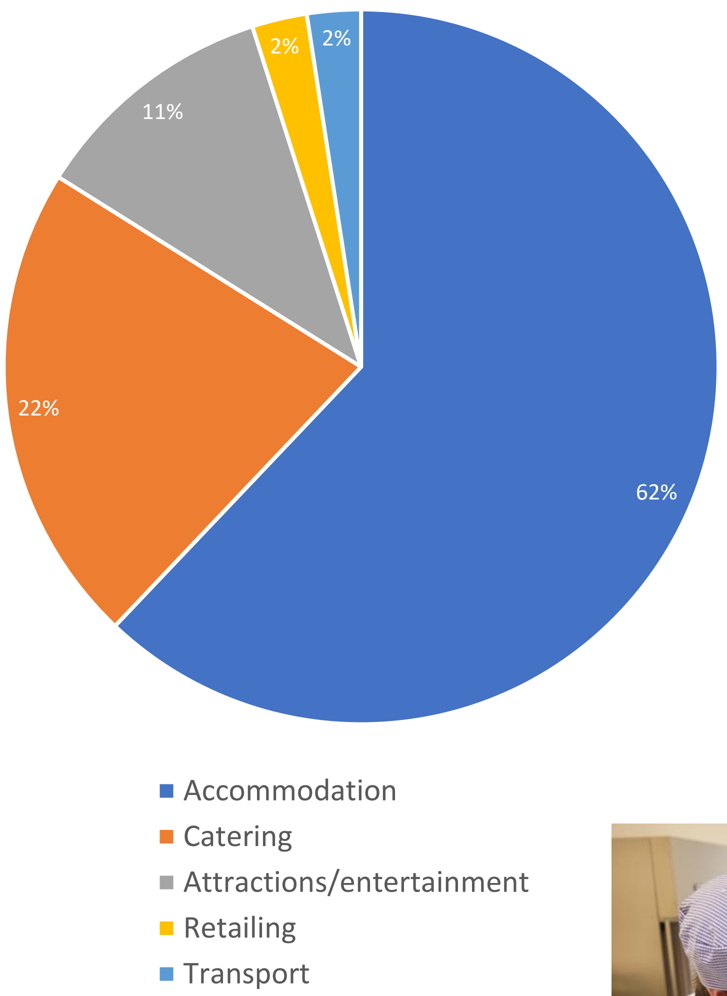
Implications for Torbay

- 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. 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

1.7 Employment

Figure 24. Torbay Direct Visitor Economy Employment 2024



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.

Shutterstock (2025) Young trainee chefs_119348407

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.

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

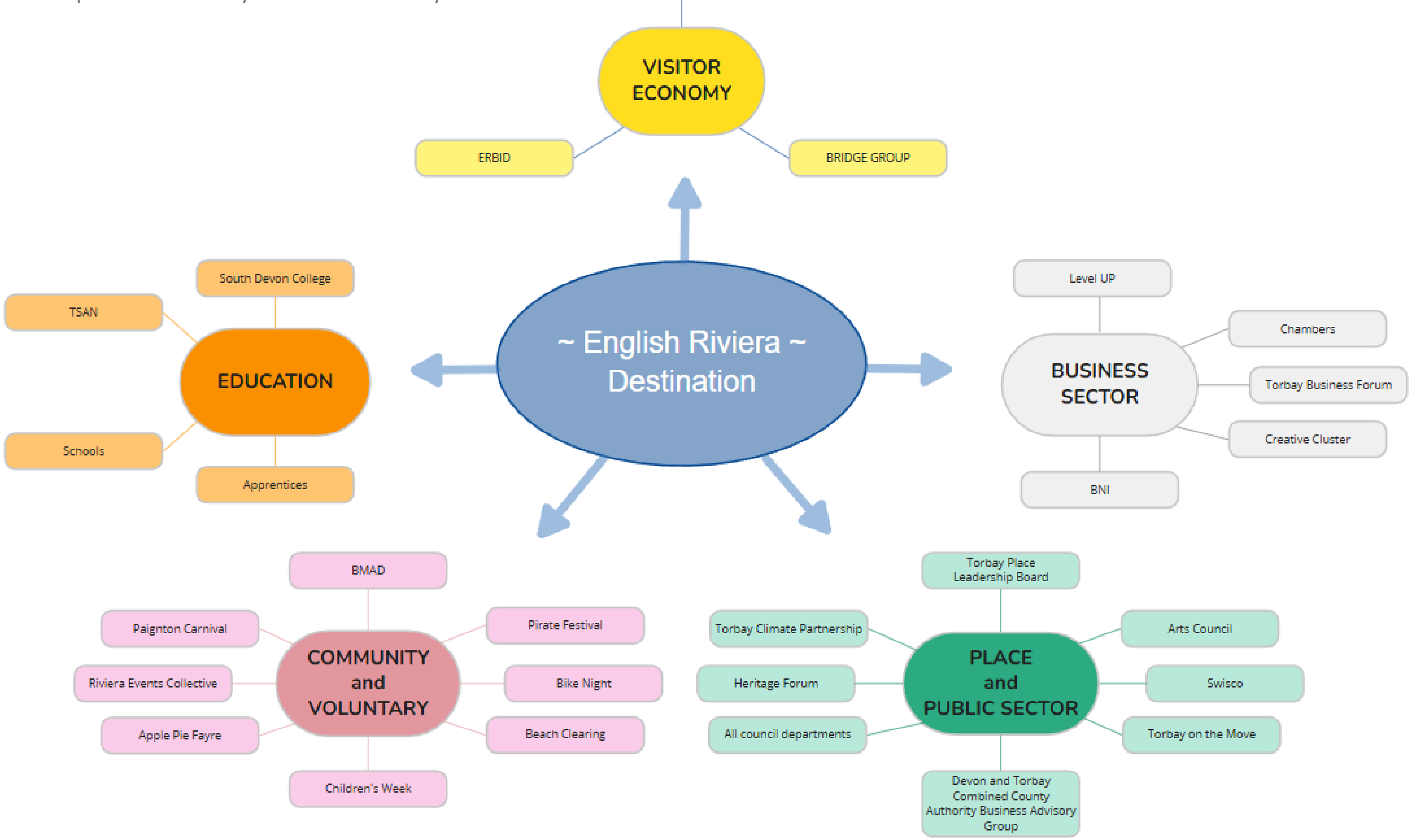
1. The governance of the English Riviera's Destination Management Plan is currently overseen by the Destination Management Group (DMG). This group has played a pivotal role in the implementation and delivery of the DMP, fostering collaboration among various organisations and tourism businesses to enhance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

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



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 .

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

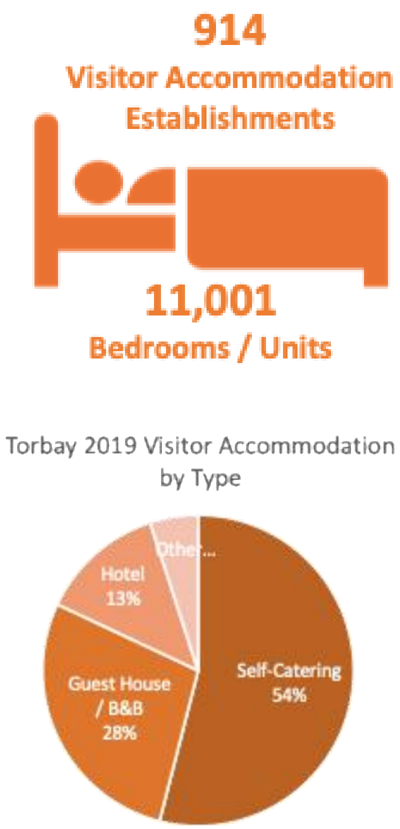
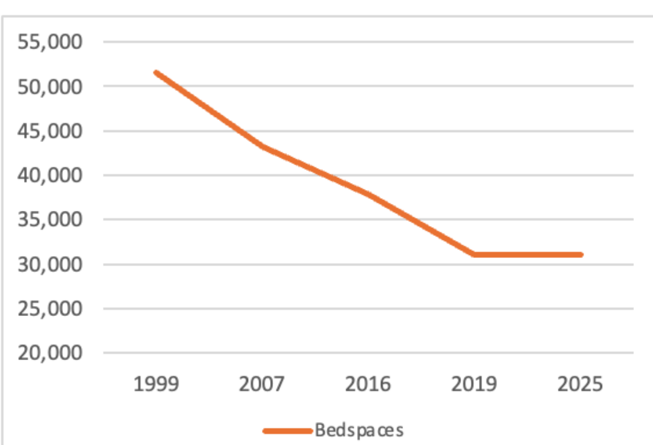


Figure 27. Accommodation Supply: 25-Year Trend



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.

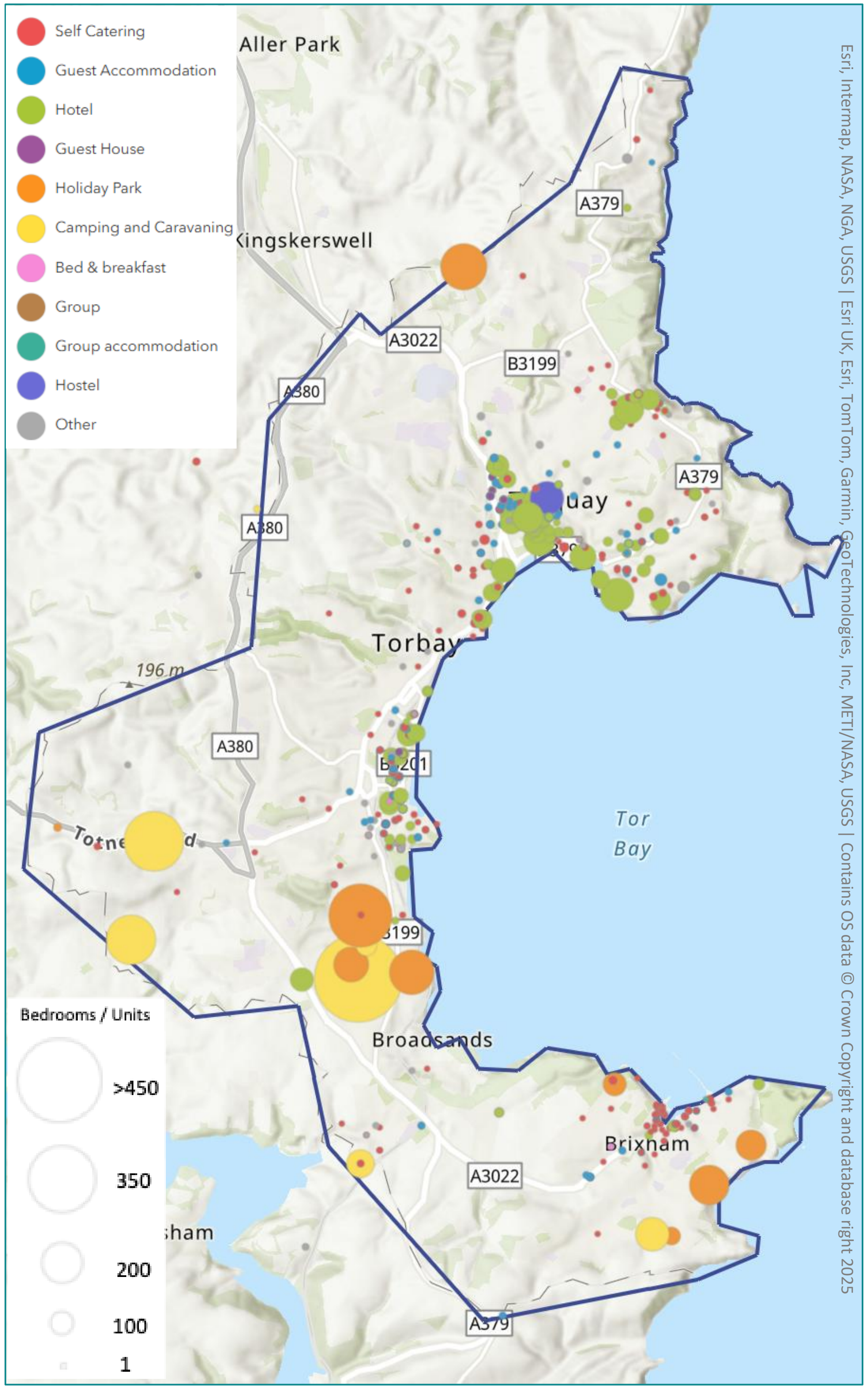
9. Ideally the 2019 audit should be updated as since it is likely that a proportion of smaller B&Bs will have transferred to self-catering operation with distribution through Airbnb, Booking.com or similar channels.

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

Map 2. Location of Tourism Economy Accommodation Establishments



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

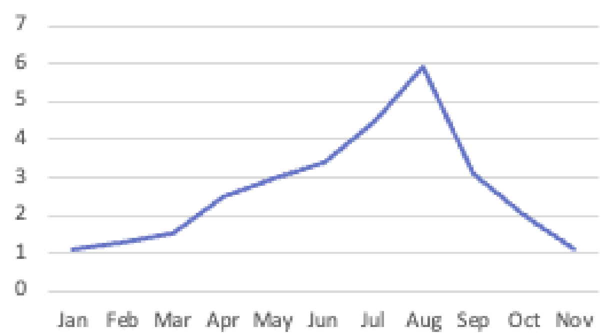


Table 6. Torbay UA - Sharing Economy - YTD Summary

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 *circa*	537	

Figure 29. SE Low & High Season Comparative Occupancy

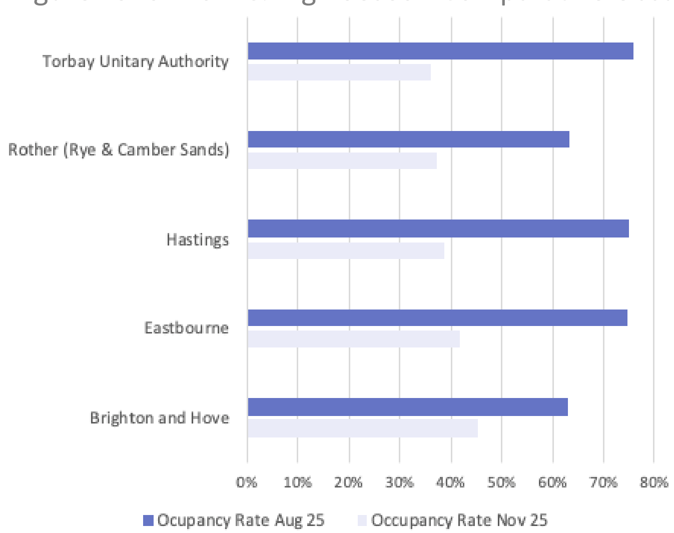


Figure 30. SE Relative Size and Three-Year Growth Trend (Revenue in £m for September 2025 and the two previous years)

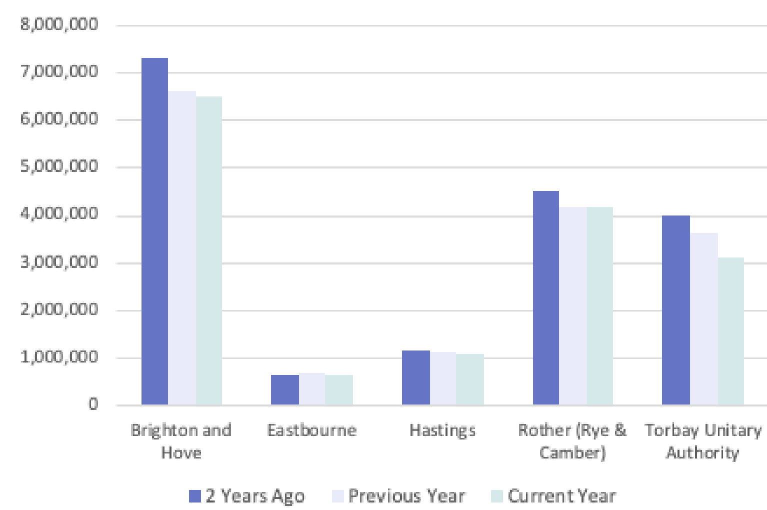
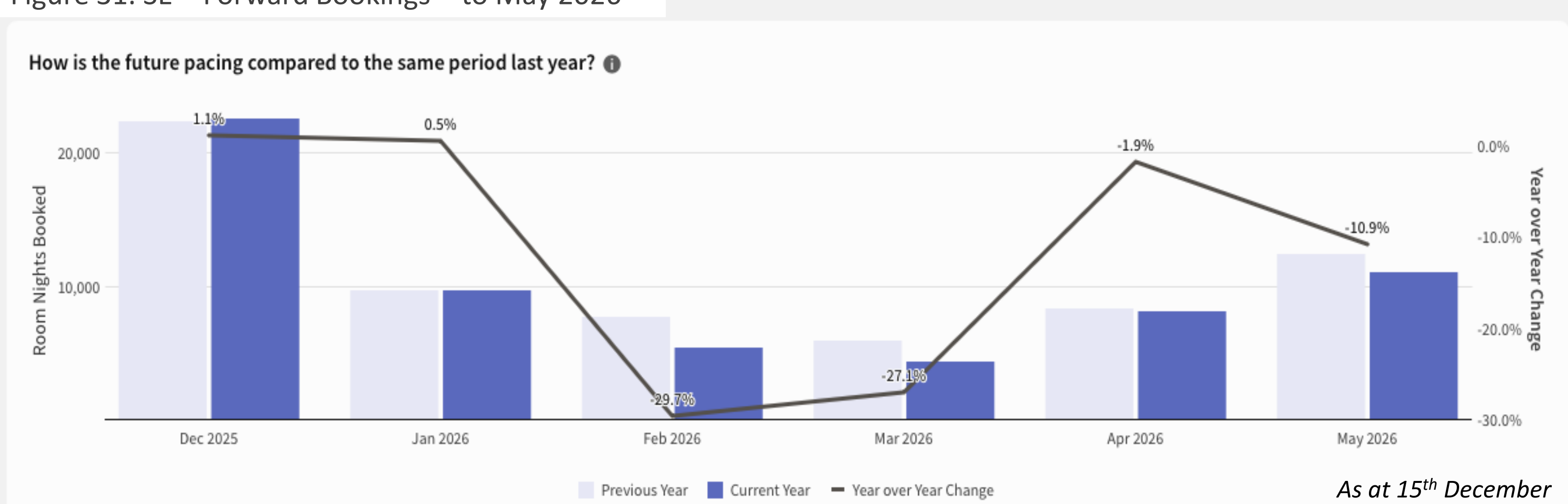


Figure 31. SE – Forward Bookings – to May 2026



As at 15th December

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 then 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.

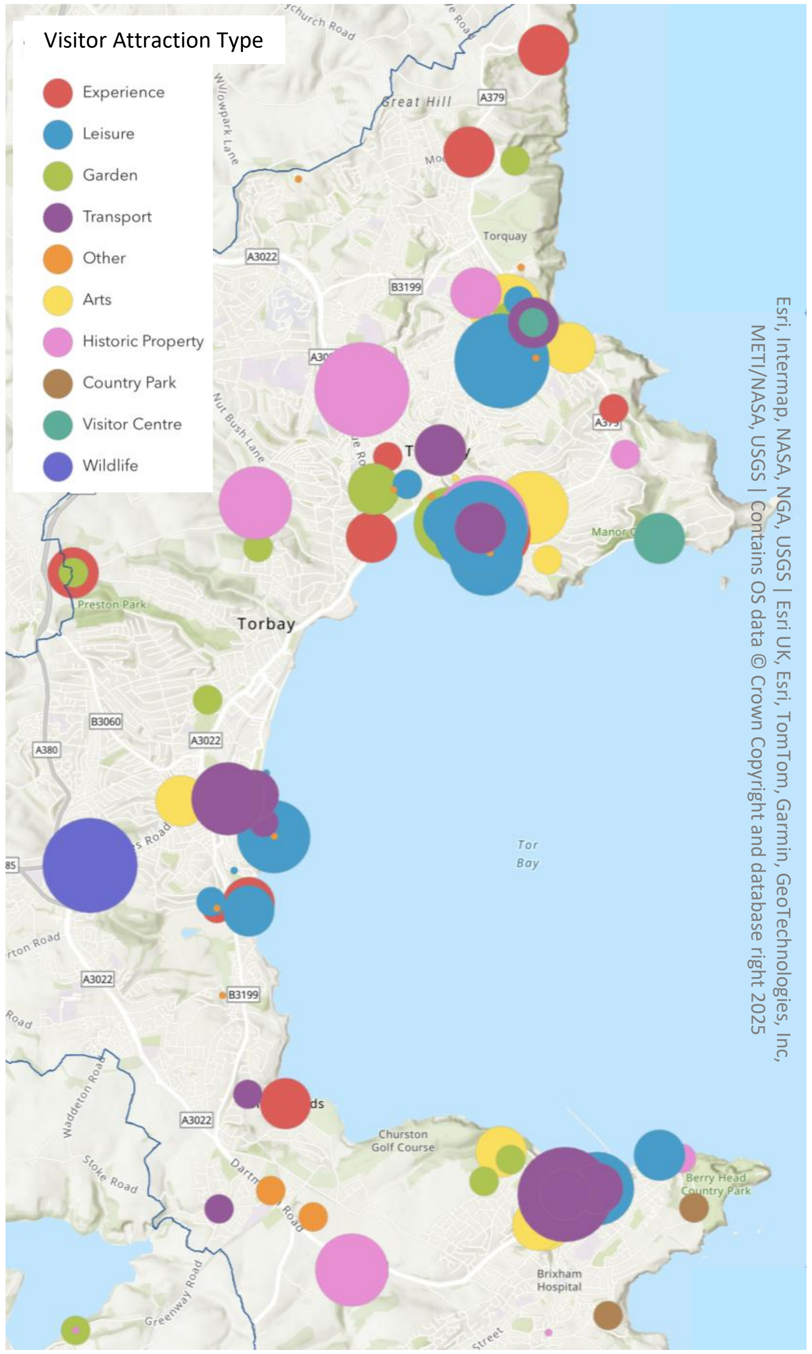
1. Job estimates calculated using Deloitte & Oxford Economics methodology set out in *Tourism Jobs & Growth* November 2013 commissioned by VisitBritain

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

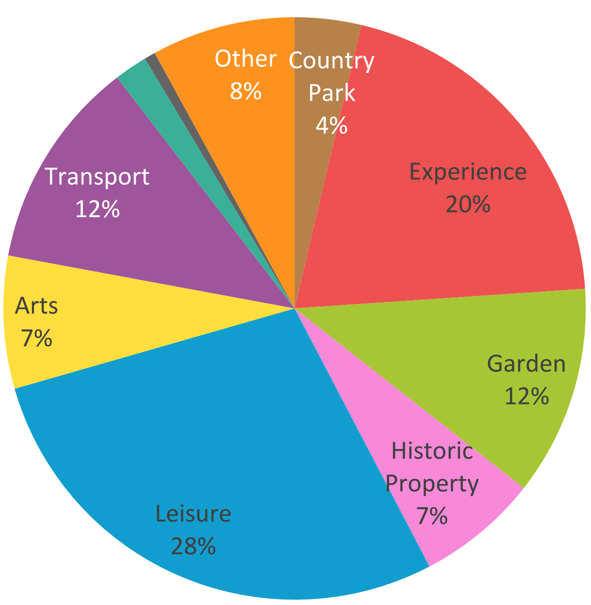
Map 3. Visitor Attractions - Distribution across Torbay



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



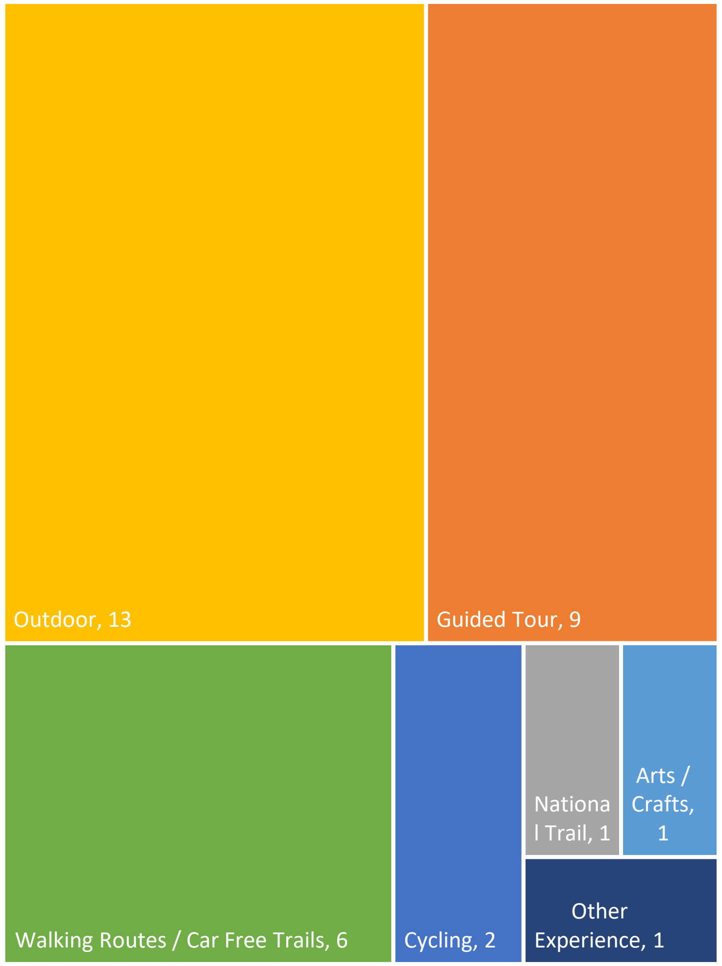
1. Source: https://www.englishriviera.co.uk/things-to-do/english-riviera-attractions

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
Coleton 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 ambiance 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.

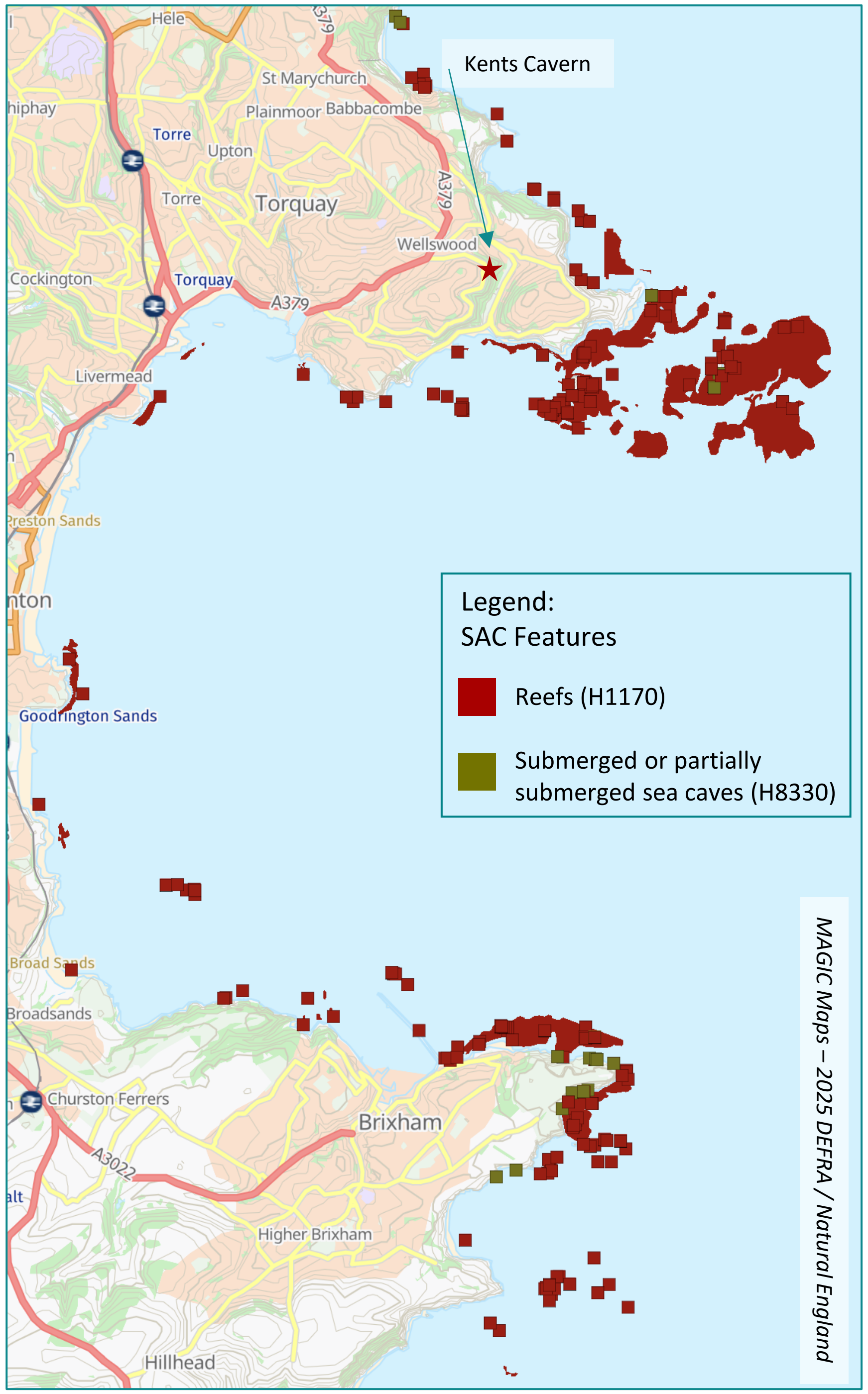
6. Accommodation showed a net increase over 2021 in terms of both value for money and quality which is a credit to the sector across Torbay and something to be celebrated and built on.

Figure 34 – Interim Results – Business Survey 18.12.25

Which aspects of Torbay's visitor experience do your customers most commonly identify as needing improvement? n=38

3.7 Habitats Regulations Assessment

Map 4. Torbay Special Areas of Conservation



Thie 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.

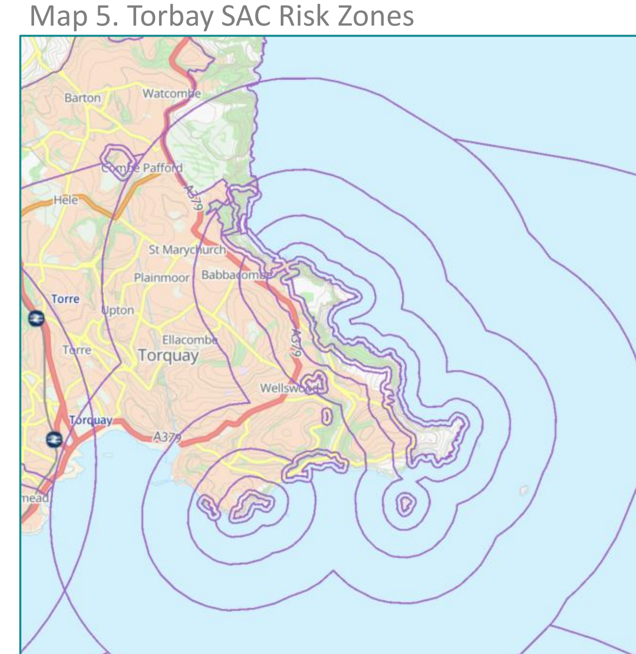
Does the new Destination Management Plan need an HRA?

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



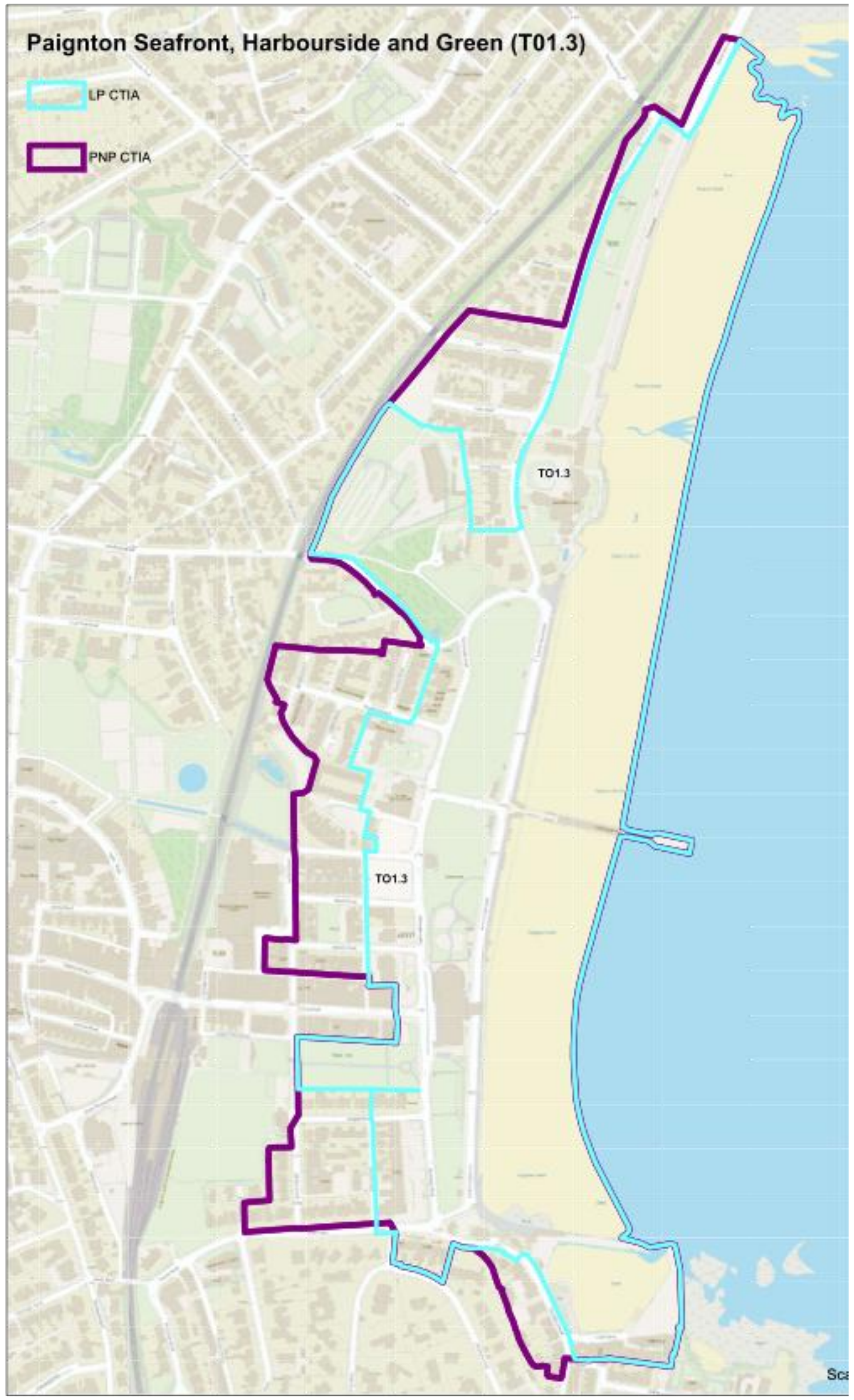
Torbay SAC Risk Zones for SSSI Interest Torquay 2025 Natural England

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

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

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 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

ONS Crown Copyright Reserved [from Nomis on 5 December 2025] - Employment Estimates within the Formal Visitor Economy 2024 Open access Industry Code	Unmodulated	Visitor Weighting Factor %	Direct Jobs 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_LowRes_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_LowRes_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/
2020	**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	**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

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?

IV. Index of Figures, Maps and Tables