ENGLISH RIVIERA
DESTINATION MANAGEMENT PLAN
2022-2027
BASELINE REPORT

CONTENTS

1. SUMMARY FINDINGS

This document is a technical appendix to the new Destination Management Plan (DMP). It provides a summary of the main findings from the baseline review, consultation and engagement, benchmarking, data and market analysis. It also includes a review of the progress against the 2017-21 DMP. Key findings are:

- The English Riviera has a large and important visitor economy with 4.5m visits and £563m spend (2019) and 7500 FTEs employed in tourism (18% of all local employment).
- In comparison to other destinations it is noticeable that the majority (78%) of visits are for holidays 78% (England average 47%) and that in comparison to the rest of the country visitors to the English Riviera stay longer but have a lower average spend.
- Visitors are also incredibly loyal with 87% returning and tend to be older with 60% aged 55+.
- Given the 'holiday focus' it is unsurprising that 29% of all visits take place in July and August.
- Staying visitors are critically important as they account for just 24% of visits but 71% of spend.
- Covid has had a huge impact on visits in 2020 and 2021 but the staycation effect in summer 2021 saw business booming and recognition by TripAdvisor as the UKs No.1 staycation destination has helped raise your profile.
- There has been success in establishing a new partnership the Destination Management Group (DMG) and delivery for marketing and research via the English Riviera BID Company Ltd (ERBIDCo).
- There has been some significant new investment and new businesses opening e.g. Fragrance Group, Brownsword, WeSup, Rockfish. There is a large stock of visitor accommodation (31,000 bedspaces) which is not always of a quality that the markets demand.
- Designation as a UNESCO Global Geopark is significant but it is not well understood by visitors (or locals) and needs more touchpoints for visitors to engage with it.
- Marketing has developed with a new website and campaigns but the brand hierarchy can feel confusing and 'English Riviera' tends not be used by locals who instead refer to the 3 towns. The polycentric nature of the 3 towns can also make it difficult to explain to non-visitors what the different offer and experience is in each.
- Visitor research shows that Torbay offers most of what current visitors want and they are satisfied and describe the destination fondly if a little 'rough around the edges'. New visitors often rate the experience higher than they had perceived. Non-visitors lack awareness of the destination and what it has to offer and will often look for assurance that nightlife, food and drink and artisan experiences are available.

- There has been success in securing funding (Future High Streets, Town Deal, Community Renewal, Welcome Back Funding) and this has supported the sector as well as providing investment in improving public realm and town centres.
- The sector has struggled to recruit (a national problem) but there has been success in linking the sector needs to skills and training through the close relationship with South Devon College.
- Cultural Tourism pillars identified in work done in 2018 have strong market appeal. They are ‘Speed Up’, ‘Slow Down’, ‘Well-Read’, ‘Artisans and Makers’.
- The English Riviera has six thematic product clusters that were identified as part of this work: UNESCO Global Geopark; Beside the Sea; Family fun; Walking; On the Water; Heritage and Culture.

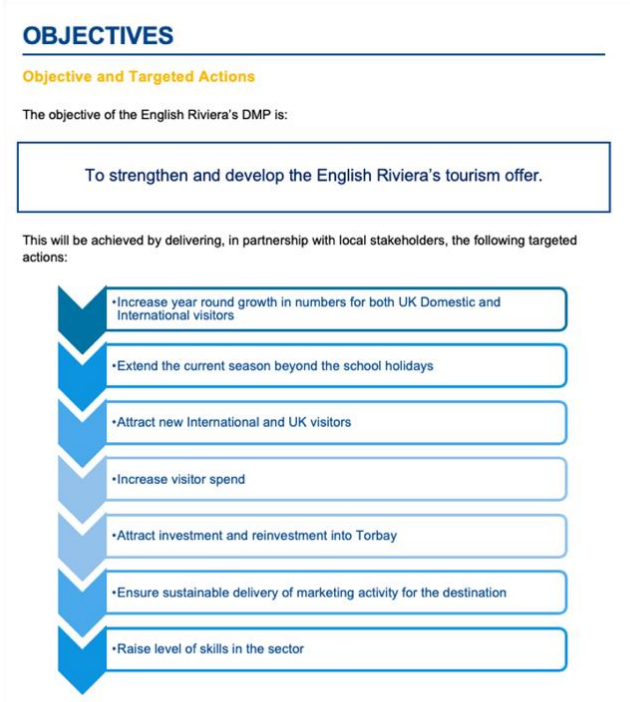
2. DMP (2017-21) REVIEW

BACKGROUND

The Destination Management Plan 2017-21.
The preceding DMP was an ambitious plan setting out a range of 27 actions across six main priority areas:

- Partnership working
- Product development
- Market development and communication
- Developing the destination
- Visitor experience
- Skills and business development

The priorities and related objectives are illustrated here:



PROGRESS

While Covid-19 has understandably changed and impacted the focus of the last 18 months or so, there has still been significant progress in a number of areas.

Notably the partnership has been established and the DMP is overseen by the Destination Management Group. The ERBIDCo has been appointed to deliver many of the market facing actions especially around marketing and communications but also in respect research (of visitors and businesses). More recently plans have been developed to strengthen conference sales activity through a sales and marketing partnership with Meet Devon under a Meet English Riviera brand identity. As part of this project a roundtable session was held with the members of the DMG and the members were asked to consider the achievements of the DMP over the last four years. Here is what they said:

- Partnership working
- Link with Geopark
- Skills & apprenticeship in sector
- Occombe developments (integrated with culture and increasing spend)
- International & natural visitors
- Meet Devon & Meet English Riviera
- Tourism promotion & Marketing (ERBID co)
- Cultural offer improved (walking tours, links to writers, geopark, TUFC) – year round growth
- Pierre Point Restaurant
- Fragrance investment
- National award winning skills in sector
- Improved toilets
- Outdoor activities (new business/collaboration)
- Encouraging raising of standards (positive competition in accommodation)
- Inward investment and greater confidence to invest by existing organisations
- Digital marketing
- New products – cultural tourism/using heritage
- Fresh perspectives and perceptions
- Skills development e.g. outdoor experience market
- More emphasis on cultural tourism (Agattha Christie)
- ERBID – ballot win
- Increase in year round visitors
- Collaboration/conversations taking place more often (and better)
- Extending season (xmas trail of lights)
- Raising skills – customer service very good
- Attracting investment (Fragrance group, WeSup, THAT Group/Hampton, independents)
- More coordinated national marketing
- Higher profile achieved
- No. 1 for Tripadvisor
- Covid galvanised the ER team – given time to think
- New operators e.g. WeSup and improved food and drink offer
- Sustainable delivery of marketing activity via ERBID
- Increased visitor numbers and expanded season
- More awareness of the area amongst national event producers
- Re-development raise the profile
- Better recognition of Geopark – draw to visitors
- Increased investment (Fragrance, WeSup, Spa)
- Better focus on the place (clean, toilets)
- Partnership (public/private)

A summary of the progress against each priority is as follows:

Partnership working

The DMG is established and has been meeting regularly. There are concerns that senior members don't always attend as regularly as is needed to maintain the focus in progressing the more challenging actions. The relationship with ERBIDCo has enabled there to be concrete progress in a number of key areas such as marketing and research. The recent setting up of Meet English Riviera is a positive step in supporting the growth of business tourism.

Product development

While there has been some progress in communicating the offer via digital channels and there has undoubtedly been private sector investment in a number of notable developments, there is still much more to be done to elevate the offer across all thematic areas in order to strengthen visits year round. Covid-19 has had an understandable impact resulting in relatively high retail vacancies and some notable closures such as Living Coasts. But alongside this there is progress not least in new and upgraded visitor accommodation.

Market development and communication

A new website and content, new campaigns and straplines have all resulted in positive exposure for the destination and this has positioned the area well coming out of Covid-19. There is still work to be done to clarify the brand hierarchy and different positioning that is evident across platforms and there is more work to be done to fully embrace the potential from the UNESCO Global Geopark.

Developing the destination

There has been progress and changing the look and feel of a destination and the towns takes time. Improvements to toilets, seafront lighting and public realm are all welcome. But there are still some notable challenges and prominent sites that are vacant or 'unloved'. It is important that the answer for these sites is carefully considered as they present once in a generation opportunity but redundant sites in prominent locations will only serve to undermine investment by others.

Visitor experience

Progress in this priority area is mixed. Understanding and tackling areas of visitor complaint and frustration (e.g. parking) takes time and has implications for residents too. The 17-21 DMP makes little mention of visitor gateways and movement between the towns including by public transport or bike.

Skills and business development

This was a well thought through area of the current DMP and there have been a number of actions that have progressed, in part supported by Covid recovery funding. Long standing industry challenges which result in the sector appearing unattractive as a career to young people need creative local solutions and a close integration between employers and education.

While reviewing the DMP there are a few other findings which will impact upon delivery and which need to be considered in preparing the new DMP:

- Market focus – the 17-21 DMP lacked clarity about which were the priority markets for the English Riviera. The market focus is needed to strengthen actions around marketing, development and management.
- Resources – the scale of resources restricts the pace and ambition for the DMP. While tourism is a significant employer in Torbay the availability of public and private resources to enable destination marketing, product development and destination management limits any potential for growth. It is therefore all the more important that a market focus is applied to the DMP.
- DMP focus – 27 actions is a lot and inevitably some are more important than others. Experience of other successful destinations suggests that limiting the number of priorities and actions is more likely to result in impact and progress.

It will be important that in developing this new DMP the strengths of the former are retained and that new solutions are found for taking forward some of the more challenging issues, whether that be finding meanwhile uses for redundant premises, addressing the over-supply of accommodation or building on areas of untapped potential e.g. food and drink.

3. STRATEGIC AND POLICY ENVIRONMENT

KEY POINTS

- Tourism has been one of the hardest hit sectors of the UK economy by Covid-19 and recovery is at the forefront of strategic planning, nationally, regionally and locally. The UK Government is transitioning its Industrial Strategy to its 'Build Back Better: Our plan for growth'; DCMS launched its Tourism Recovery Plan in June 2021; The Great South West Tourism Partnership has launched 'Towards 2030, Reimagining the Visitor Economy in the South West'; the Torbay Economic Recovery Plan sets out Torbay's proposed response to the economic challenges following the Covid-19 pandemic.
- The visitor economy features prominently in Torbay's strategic and policy environment, reflecting the importance of the sector within the local economy.
- The de Bois Review: An independent review of Destination Management Organisations was published by DCMS in September 2021. The review has sought to establish whether there may be a more efficient and effective model for supporting English tourism at the regional level.

National, regional and local strategies/plans in this section are:

National strategies/plans	Build Back Better: our plan for growth, HM Treasury, March 2021
	Visit Britain/Visit England Strategy 2020 - 2025
	DCMS Tourism Recovery Plan, June 2021
	The de Bois Review: an independent review of Destination Management Organisations, DCMS, Sept 2021
	National Coastal Tourism Academy: Vision Strategy and Action Plan, 2017
South West	Towards 2030, Reimagining the Visitor Economy in the South West, The Great South West Tourism Partnership
	Heart of the South West Local Industrial Strategy, Heart of the South West LEP
	Building Resilience in the Heart of the South West Visitor Economy, November 2020
	Heart of the South West LEP Tourism and Visitor Economy Recovery Plan, June 2020
Torbay	Torbay Economic Recovery Plan

Torbay Local Plan, 2012-2030
Torbay Community and Corporate Plan, 2019-2023
Torbay Economic Strategy, 2017-2022
Torbay Cultural Strategy, 2014-2024
Torbay Cultural Tourism Findings and Strategy, 2018
Torbay Heritage Strategy, 2021-2026
English Riviera (Outdoor) Events Strategy, 2021-2027
Torquay Town Centre Investment Plan, July 2020

NATIONAL STRATEGIES/PLANS

Build Back Better: our plan for growth, HM Treasury

'Build Back Better: our plan for growth' sets out the Government's plans to support growth through significant investment in infrastructure, skills and innovation, and to pursue growth that levels up every part of the UK, enables the transition to net zero, and supports the vision for Global Britain. The plan supersedes the Government's 2017 Industrial Strategy.

Visit Britain/Visit England Strategy

Tourism in Britain contributes 9% of GDP and accounts for 10% of all jobs. It has been recognised as a leading sector in the Government's future economic planning, with the granting of a Tourism Sector Deal as part of its Industrial Strategy. The Visit Britain/Visit England Strategy sets out how it will support the delivery of the Tourism Sector Deal. Within this, the VisitEngland 5-year strategy (2020-25) highlights the following aims:

- Developing regional English tourism product.
- Distributing and promoting product to our domestic and international customers.
- Helping businesses to grow through business advice and support.
- Growing the business events industry.

VisitEngland Strategy:

Grow value

Through stepping up our domestic marketing activity, we will address the balance of trade deficit and encourage more people to holiday at home. We will focus on younger customers (aged 18-34), whose domestic tourism activity is in decline, and families, who are both essential for the long-term growth of the industry. Through developing our customer segments for the domestic market, we will ensure we reach the right customers with the right content. Through our work in the delivery of the Tourism Sector Deal, we will support Government's ambition to make the UK the most accessible destination in Europe.

Support productivity

Our priority will be to support the development of the England product, this will extend the season for an international and domestic audience and enable the distribution of this product in international markets building on the success of the Discover England Fund. By helping the industry build digital skills, we will ensure that product is researchable and bookable online. Our focus on winning business events for England will see us work closely with venues and locations and matching them with international opportunities, providing them with platforms to meet international buyers and supporting them through the bidding process.

Drive regional dispersal

Working in partnership with Destination Management Organisations (DMOs), we will grow visits and value of our leisure and business travel across England. This will be supported by the development of regional product that addresses domestic and international market gaps and address product gaps through the distribution platform Tourism Exchange Great Britain (TXGB). In addition, we will build our partnerships and expertise in route development to grow connectivity to regional England. Through our work on the delivery of the Tourism Sector Deal we will identify new Tourism Zones, supported by central Government, and a biddable funding process, to drive visitor numbers across the country, extend the season and to tackle local barriers to tourism growth.

Be the expert

We will ensure that VisitEngland is seen as a trusted partner in delivering on the Government agenda and provide and distribute statutory research, data and analysis that informs our own, industry and Government decision-making. Supporting and working together with DMOs and the wider England *industry our assets, market plans and intelligence will be shared for national benefit. We will also provide platforms and events that enable us to share best practice and celebrate business excellence across English tourism.*

Our customers
Our global segments, nuanced by markets, are:

- *Buzzseekers – younger, free-spirited and spontaneous, they like holidays full of action and excitement*
- *Explorers – older, they enjoy the outdoors, sightseeing and embracing local culture at a more relaxed pace*
- *Culture buffs – image and brand-conscious, travel is seen as a status symbol; they like well-known safe destinations*
- *Free and easy mini-breakers – similar to buzzseekers, this younger domestic audience love the opportunity to take short breaks where they can either let loose or unwind*

Our markets
UK Domestic
Drive regional and seasonal dispersal increasing volume and value of short breaks in the shoulder season. Increase focus from one to two target audiences to address long term growth and short-term opportunity.

Overseas
Our most beneficial overseas market by some distance, and the market showing the most profitable growth, is the USA, followed by value growth from China. These are two of our markets that we uplift investment in using the GREAT funds – we add to that Australia, France, Germany, GCC, India and UK. Our secondary markets for value include the rest of Europe, Canada, Brazil and South Korea. Lower growth (among our core markets) is projected from Hong Kong, Japan, Russia and Austria. For each market we have developed and refined a market strategy that focuses on the best prospects for driving tourism growth.

DCMS Tourism Recovery Plan, June 2021

Tourism has been one of the hardest hit sectors of the UK economy by COVID-19. Oxford Economic does not predict tourism in the UK to return in full to 2019 levels of volume and expenditure until 2025. The Tourism Recovery Plan sets out the role that the UK government will play in assisting and accelerating the tourism sector's recovery from Covid-19. The aim is to:

- *Recover domestic overnight trip volume and spend to 2019 levels by the end of 2022, and inbound visitor numbers and spend by the end of 2023 – both at least a year faster than independent forecasts predict.*
- *Ensure that the sector's recovery benefits every nation and region, with visitors staying longer, growing accommodation occupancy rates in the off-season and high levels of investment in tourism products and transport infrastructure.*
- *Build back better with a more innovative and resilient industry, maximising the potential for technology and data to enhance the visitor experience and employing more UK nationals in year-round quality jobs.*
- *Ensure the tourism sector contributes to the enhancement and conservation of the country's cultural, natural and historic heritage, minimises damage to the environment and is inclusive and accessible to all.*
- *Return the UK swiftly to its pre-pandemic position as a leading European destination for hosting business events.*

As part of 'building it back better', the Tourism Recovery Plan refers to the review of Destination Management Organisations:

The de Bois Review: an independent review of Destination Management Organisations in England, DCMS
The review, commissioned by DCMS and published in September 2021, examined and assessed how DMOs across England are funded and structured and how they perform their roles, in order to establish whether there may be a more efficient and effective model for supporting English tourism at the regional level. The de Bois recommendations are as follows:

- *Recommendation 1: The Government should bring coherence to England's DMO landscape via a tiering approach, using an accreditation process to create a national portfolio of high performing Destination Management Organisations that meet certain criteria. I would also suggest a move away from the confusing 'DMO' term and call these nationally accredited Tourist Boards.*

- *Recommendation 2a: The national portfolio should then be split into two tiers – a top tier of accredited Tourist Boards acting as 'Destination Development Partnerships' or as leaders of them, (these could be described as 'hubs') and a second tier of accredited Tourist Boards acting as members of these Partnerships ('spokes'). Destination Development Partnership status could be awarded to either an individual accredited Tourist Board covering a large enough geography (e.g. a city region) or to a coalition of willing accredited Tourist Boards within an area that come together under a lead Board.*

- *Recommendation 2b: The Government should then provide core funding to each Destination Development Partnership. The funding should be focused on activities that ensure their destination remains sustainable, competitive and responsive to high level strategic challenges identified by the Government such as those around sustainability, skills, inclusive tourism and levelling up. The Destination Development Partnership would be expected to pass down a degree of funding to accredited Tourist Boards amongst its coalition and work collaboratively with them to deliver a shared vision.*

- *Recommendation 3: DMOs that do not meet the national accreditation criteria should be automatically considered as part of a 'third tier'. These are likely to be small, localised Destination Marketing Organisations and the Government should minimise its engagement with them.*

- *Recommendation 4: As it is England's National Tourist Board, with the statutory responsibility for growing tourism at an England level, the Government should charge VisitEngland with responsibility for creating, maintaining and supporting this new tiered structure. It should receive sufficient funding and resources to do this.*

- *Recommendation 5: The Government must also change its approach, in order to maximise the success of the new system. There is currently insufficient appreciation of the importance and promise of the visitor economy at the top of government, leading to unfilled potential in DMOs and the wider tourism landscape. In practice, responsibility for tourism policy cuts across multiple departments, creating a confusing picture. Practical measures to address these issues could include elevating the Tourism Minister to a Minister of State position and either reallocating responsibilities from other departments to sit under that Minister or making the Minister responsible for the activities of teams within multiple departments – this latter suggestion is an established practice already in other policy areas which cut across Whitehall departments.*

- *Recommendation 6: In order to help DMOs and Local Authorities take decisions on how best to develop the visitor economy in their local area, the Government should improve access to quality data by introducing the proposed Tourism Data Hub as a matter of urgency*

National Coastal Tourism Academy (NCTA)

The NCTA's 'Coastal Visitor Economy: Vision, Strategy and Action Plan' (2017) was produced in collaboration with coastal tourism businesses and destinations to "help develop tourism on the coast in a holistic and collaborative way, giving coastal tourism a new stronger voice and creating a positive change in perception". It has four main objectives:

- Improving the Visitor Economy to support wider sustainable growth.
- Develop a quality experience, distinctive activities and places to visit.
- Greater working together.
- Presenting a positive image of the coast.

The objectives in the strategy are backed up by an action plan to be delivered by a working group comprising industry leaders, business owners and tourism experts. In September 2020 (updated February 2021), NCTA published a report assessing the impact of Covid on coastal tourism. The 2021 forecast is for coastal tourism spend in England to fall by £5.23bn (38% of pre-Covid levels). NCTA is lobbying for funding to deliver a 3-year Coastal Tourism Recovery Programme.

SOUTH WEST

Towards 2030 – Reimagining the Visitor Economy in the South West, The Great South West Tourism Partnership

The Great South West Tourism Partnership member destinations cover Cornwall, Isles of Scilly, Devon, Plymouth, Torbay, Somerset County, Dorset and Bournemouth, Christchurch and Poole. 'Towards 2030' provides key strategic priorities aligned to the Government's Build Back Better and Levelling Up agenda namely, to deliver clean and inclusive growth to achieve Net Zero and to be the most accessible and inclusive destination in the UK. In addition, the Plan will address seasonality, improve productivity and increase spend per visitor. It will build the resilience of the sector, improve skills and employment, and promote the region through regional marketing and communication campaigns to new growth markets.

Heart of the South West Local Industrial Strategy, Heart of the South West LEP

The Heart of the South West covers Devon, Somerset, Plymouth and Torbay. The five foundations of productivity are stated as: Ideas, People, Infrastructure, Business Environment and Places. Under the 'Places' foundation, lifting economic performance in all areas will be achieved by four stated aims including: '*improving the productivity of the visitor economy and generating higher value tourism, aligned with the Tourism Sector Deal'.*

Building Resilience in the Heart of the South West Visitor Economy, Heart of the South West LEP, November 2020

In January 2020, TDA commissioned a research study to provide an evidence base that enables the visitor economy in the region to improve its resilience and identify opportunities for growth and to improve productivity. The report was completed pre-Covid and updated in November 2020. Recommendations are provided under four headings:

- Improving productivity (building the year-round offer; improving data and research; improving skills).
- Building the resilience of the sector (building/supporting existing business networks; insights and data).
- Develop Tourism Strategy Group.
- Build engagement with the LEP.

Heart of the South West LEP Tourism and Visitor Economy Recovery Plan, June 2020

Following on from the 'Building Resilience' research, a Recovery Plan was developed setting out a number of short, medium and long-term actions to support and revitalise the sector.

TORBAY

Torbay Economic Recovery Plan

'Respond, Recover, Reposition' sets out Torbay's proposed response to the economic challenges following the Covid-19 pandemic. Partners include Torbay Together, Torbay Business Forum, the Chambers of Commerce and TDA. The Plan's objectives are:

- To minimise the immediate economic impacts of the Covid-19 crisis as far as possible.
- To accelerate local economy recovery.
- To embed inclusive economy principles to tackle inequality, exclusion and poverty leading to a more sustainable economy.
- To raise skills level across all age groups.
- To bring about greater resilience in the local economy.

Reposition actions (6 -30 months) for the Visitor Economy are:

- Review the Destination Management Plan against the recommendations in the 'Building Resilience in the Visitor Economy' report to build a more resilient, year-round tourism sector and build in the English Riviera's destination aspirations into the SW Tourism Zone prospectus.
- Support the ERBIDCo to implement the Heart of the South West LEP Tourism and Visitor Economy Recovery Plan, reflecting working in partnership.
- Build on the 'Be the Business' Programme (subject to initial evaluation).
- Work with Heart of the South West Better Business for All, to provide a consistent approach to regulatory support across the LEP area.

Torbay Local Plan, A landscape for success The Plan for Torbay: 2012 – 2030, Torbay Council

The Plan has five aspirations for the Bay:

- Secure economic recovery and success.
- Achieve a better connected, accessible Torbay and essential infrastructure.
- Protect and enhance a superb environment.
- Create more sustainable communities and better places.
- Respond to climate change.

Policy TO1 'Tourism, events and culture,' comes under the 'secure economic recovery and success aspiration. This states that:

Torbay's tourism offer will be developed in a sustainable and competitive manner, to enhance its role as a premier tourism destination. Tourist facilities and accommodation will be improved and modernised, and new tourism facilities provided, in order to attract new visitors, particularly overnight visitors, and increase overnight spend. Growth sectors such as sustainable tourism, will be actively encouraged.

A number of measures are outlined to achieve the Council's wish to see the quality of accommodation improved, with a wider range of new and refurbished facilities and services.

One Torbay: Working for all Torbay, Community and Corporate Plan 2019 - 2023, Torbay Council

The Plan states as its ambition:

- *We want Torbay and its residents to thrive.*
- *We want Torbay to be a place where we have turned the tide on poverty and tackled inequalities; where our children and older people will have high aspirations and where there are quality jobs, good pay and affordable housing for our residents.*
- *We want Torbay to be the premier resort in the UK, with a vibrant arts and cultural offer for our residents and visitors to enjoy; where our built and natural environment is celebrated and where we play our part in addressing the climate change emergency.*

Torbay Economic Strategy 2017-2022, Torbay Council

The Strategy states as its vision:

'An unrivalled quality of life in one of the UK's most beautiful destinations; where connectivity, culture, and ambition are growing fast, creating opportunities for everyone who lives, works and enjoys being here.'

Central to this vision is to ensure Torbay is: - A great place to do business - A great place to thrive - A vibrant community

The Strategy sets out the opportunities and actions for raising productivity and setting in place the foundations for long term sustainable economic growth. Objectives are to:

- Deliver a successful town centre regeneration programme.
- Continue to create an environment in which businesses and jobs can grow.
- Accelerate the development of employment space, geared to business needs.
- Raise skills levels and broaden the skills base within the workforce.

Three Strategy themes are:

- People and Skills.

- Business and Enterprise (including delivery of the Destination Management Plan.
- Place and Infrastructure (including developing quality accommodation in line with the Destination Management Plan).

Fit for the Future: Transformation Strategy for Torbay's Town Centres, April 2017, Torbay Council

This Strategy document is an Appendix to the Torbay Economic Strategy. It sets out a phased approach to town centre regeneration. Plans and maps are provided for Torquay, Paignton and Brixham, together with phased delivery actions.

Enjoy, Talk, Be, Do, A Cultural Strategy for Torbay and its Communities, 2014-2024, Torbay Council

The Cultural Strategy's ambitions are:

- Enjoy: enabling more people to take pleasure from cultural activities.
- Talk: encouraging purposeful exchange to share, reflect on and enhance our cultural offer.
- Do: inspiring more people to shape and make cultural experiences.
- Be: celebrating the uniqueness of Torbay's cultural past, present and future.

Its three aims are:

- To increase engagement and participation in cultural opportunities in Torbay.
- To maximise the distinctive natural and built cultural assets of Torbay.
- To ensure cultural development is a key contributor to economic, social and environmental development in Torbay.

Cultural Tourism. Motivating tourists with re-imagined experiences, itineraries and guides. 2018

This audit and study developed four pillars for using culture to support an increase in visitors, occupancy and to extend the season. Introducing the four pillars the report says '*The English Riviera is an ever-morphing, epic canvas of international significance. This is a place where the natural and cultural heritage leaves you utterly inspired. This backdrop informs and infuses everything that happens here. Escape to a place where you can speed up for adventure. Join the slow down, re-fresh and feel better. Be in good company with a well-read creative community. Embrace the artisans and makers on a journey of discovery. Live like the locals.*'

The four pillars are:

- Speed Up – adventure and activity based tourism with greater ownership of the SW Coastal Path and weaving in the UNESCO Global Geopark as a natural playground.
- Slow Down – about wellbeing and health and learning to slow down, embrace nature and live like the locals.
- Well Read – making the most of the area's literary connections.
- Artisans and Makers – going behind the scenes and getting immersed in the work of local producers and artisans.

Torbay Heritage Strategy 2021-2026, Torbay Council

The Heritage Strategy states as its vision:

We envisage heritage at the heart of the cultural and creative development of Torbay, making our home – the English Riviera UNESCO Global Geopark - a better place in which to live, work, learn and visit. This ambition expands on the direction set out in Enjoy, Talk, Do, Be, a cultural strategy for Torbay and its communities.

Caring for our outstanding historic assets and sharing our stories will maximise the potential for heritage to bring social, cultural and economic benefits to all parts of the Bay. To do this, we will develop better understanding of the risks to historic places and of the diverse meanings of heritage to different people. In line with the Local Plan, heritage will be key to driving the visitor economy as Torbay attracts new audiences seeking distinctive experiences.

We recognise that our built, natural and cultural heritage are essential to the future success of Torbay. This approach does not prevent development, but *encourages a responsible approach, balancing heritage and local need for the benefit of all our communities, now and for future generations.*

Strategy objectives include:

SEC02: Torbay attracts large numbers of visitors seeking a heritage destination
Key assets and objectives are identified under the following heritage stories:

- Geology.
- Early humans.
- Monastic and medieval.

- Agricultural life.
- Napoleonic Era.
- Trawling.
- Golden age of the resorts.
- Agatha Christie and writers on the Riviera.
- Emerging stories: Romans and Romano-British Torbay; Marble Industry; Smuggling; Recent decades.

English Riviera (Outdoor) Events Strategy 2021 – 2027, Torbay Council

The Events Strategy was developed in response to the Council's Corporate Plan, to align with the Destination Management Plan, Cultural Strategy and Heritage Strategy. It outlines a future in which events can play a much stronger role in supporting community wellbeing, the area's profile, reputation and economic growth, in support of the area's recovery from the Covid-19 pandemic and repositioning as a significant destination for events. The Vision is:

- *Together we will deliver events that create distinctive experiences for residents and visitors and that support our image as a future thinking, creative and quality year-round destination with a growing reputation for professionally delivered high quality events.*
- *We will think more about impact and seasonality, and our events will grow sustainably with the economic and social benefits felt by our residents and businesses without having a detrimental impact on the environment.*
- *Where this is not possible (for example the English Riviera Airshow) we will mitigate against environmental impact as much as possible and put in measures that will off-set the environmental impact of such events in a structured way whilst maintaining the social and economic benefits of the event for the area.*
- *The events offer will be managed in a way that not only supports the area to recover from the Covid-19 crisis but also to help it to be Naturally Inspiring, repositioned to thrive and compete long-term with other coastal destinations.*

Torquay Town Investment Plan, July 2020, Torquay Town Board

The Plan's vision for 2030 is that:

Torquay is the heart of the English Riviera. A grand, elegant town with a rich history linked to its naturally inspiring coastal, maritime and landscape setting, with a high quality and vibrant town centre. This unique setting provides one of the best places to live, work and play in the South West. Connections to London have improved and further enhancements, particularly rail, allow Torquay to be more accessible to investors and visitors from *within and outside the town. High quality tourism is one of the leading sectors with an international reputation, and the town is thriving after the Coronavirus crisis. Torquay has a high value health and social care economy linked to the Torbay Hospital improvement programme, and the wider offer of Torbay's advanced electronics and photonics sector is enhanced by the skills and space on offer in Torquay. Torquay has a thriving business community providing well-paid, high quality employment in a broad range of sectors.*

Objectives are:

- A high quality, vibrant town centre (with targets of additional visitors and new cultural and tourism facilities).
- A better connected and more accessible place.
- A high quality economy.

Torbay Together. Place Shaping and Visioning by Thinking Place

During 2021, Thinking Place have been involved in work exploring the place narrative for Torbay and the towns of Brixham, Paignton and Torquay to support the promotion and development of Torbay. This work was tasked with finding a way of articulating Torbay to different audiences and involved a large amount of engagement as part of evidence gathering.

While the Thinking Place work is intended to work across different audiences, including local communities and business, it is a robust study which the DMP needs to align to.

The outcomes of this work have been emerging at the same time as this DMP project but the main narrative for Torbay is:

'Torbay is a glorious part of Devon and England, encompassing the towns of Torquay, Brixham and Paignton, sitting on the beautiful Tor Bay and next to the stunning landscape of Dartmoor National Park. Whilst this is a mecca for tourists and known to many as the English Riviera, it also hosts globally significant technology businesses operating in photonics, marine industries, nanotechnology and medi-tech. The area benefits from a wonderfully mild climate which, coupled with the compelling natural environment, makes it a hugely attractive place to live and work.'

The wider story contains a number of important themes:

- Tech by the Bay.
- The hub for active adventurers.
- Blue and green natural environments.

All of this work is summarised in the following statement - *Torbay: The premier marine and natural experience.*

There are also stories for each of the three towns as follows:

- Brixham is a creative food and fishing fusion.
- Paignton is family fun on the foreshore.
- Torquay is leading on leisure and lifestyle by the sea.

While this work is still being finalised it has been important to reflect these findings in our thinking about destination positioning, branding and marketing.

4. VISITOR DATA

KEY POINTS

- The Covid pandemic is estimated to have resulted in Torbay's visitor numbers being down by approximately 51% in 2020 compared to 2019.
- In 2019, approximately 4.5 million tourism visits were made to Torbay, generating £563 million for the local economy and supporting close to 7,500 full-time equivalent jobs.
- The staying visitor market accounts for 24% of all trips and 71% of visitor spend.
- Torbay accounts for close to a fifth (19%) of Devon's overnight tourism trips and 12% of Devon's tourism day trips.
- The trend in tourism visits over recent years has been broadly flat, in Torbay and nationally.
- A high proportion of Torbay's domestic overnight trips are for holiday purposes – 78% compared to the England average of 47%.
- For staying visits in Torbay, average length of stay and spend per trip are higher than the England average. For tourism day trips, average spend is lower than the England average.
- Seasonality is a critical issue for any seaside destination. For Devon, it is estimated that 29% of staying visits take place in July and August.
- Tourism industry employment accounts for 18% of all industry employment in Torbay, compared to the England average of 11%.

INTRODUCTION

Torbay's Economic Impact report for 2020[1] suggests that the Covid pandemic is likely to have resulted in a 51% fall in visitor numbers and a 54% fall in visitor spend compared to 2019. It estimates that approximately 2.2 million tourism trips were made to Torbay in 2020, generating an economic impact of £259 million. At the time of producing the report, there was very little national survey data available and there is still a lot of uncertainty around 2020 volume and value figures. Visit Britain has now provided estimates for inbound tourism (updated September 2021) and domestic tourism (updated May

[1] *The Economic Impact of the Torbay Visitor Economy 2020, The South West Research Company Ltd*

2021) to reflect the impact of COVID-19. Inbound visits are estimated to have declined by 73% in 2020 compared to 2019, domestic staying visits by 60% and day visits by 64%. Given that 2020 was an extraordinary year, the analysis in the remainder of this section uses 2019 data to present the most representative picture of tourism in the English Riviera.

TORBAY TOURISM VOLUME AND VALUE

Torbay attracts approximately 4.5 million tourism visits annually, generating £563 million for the local economy and supporting close to 7,500 full-time equivalent jobs. The staying visitor market accounts for just 24% of total tourism trips to Torbay but 71% of visitor spend.

Table 1: Torbay Tourism Volume and Value 2019

	Trips (m)	Nights (m)	Spend (m)	Economic Impact (m)*	Employment supported (fte)
Staying visits	1.11	4.32	£299	£412.84	5,599
Day visits	3.43		£124	£150.56	1,859
Total visits	**4.54**	**4.32**	**£423**	**£563.40**	**7,458**

** Local business turnover supported by tourism activity*
Source: Torbay-20F Economic Impact Data, The South West Research Company

TORBAY AND DEVON COUNTY

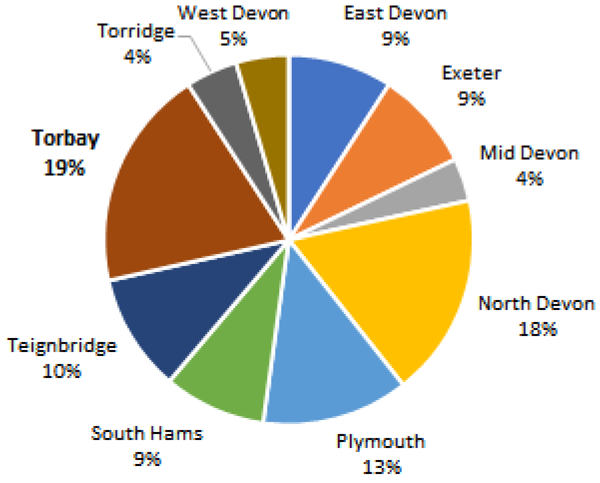
Torbay accounts for close to a fifth (19%) of Devon's overnight tourism trips and 12% of Devon's tourism day trips. North Devon has a similar share of overnight trips (18% of the Devon total). Plymouth and East Devon account for the largest shares of tourism day trips (15% and 14% respectively).

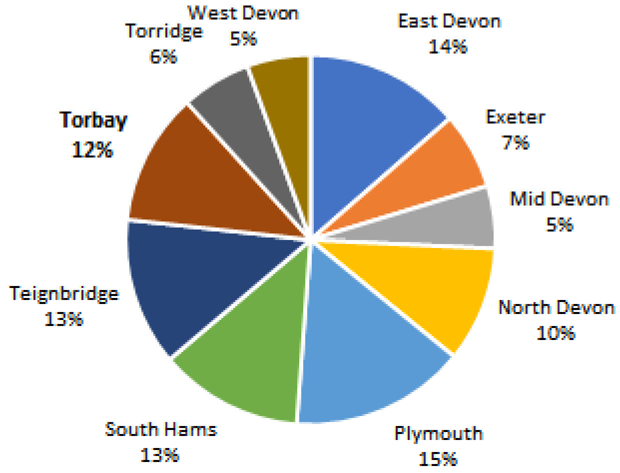
Table 2: Torbay's share of Devon County

	Torbay trips	Devon trips	*Torbay as % Devon*	Torbay nights	Devon nights	*Torbay as % Devon*	Torbay spend	Devon spend	*Torbay as % Devon*
UK staying visits	1,020,000	5,274,000	*19%*	3,784,000	20,494,000	*18%*	£262,991,000	£1,184,354,000	*22%*
Overseas staying visits	90,100	458,000	*20%*	536,300	3,360,000	*16%*	£35,704,000	£197,635,000	*18%*
Total staying visits	1,110,100	5,732,000	*19%*	4,320,300	23,854,000	*18%*	£298,695,000	£1,381,989,000	*22%*
Day visits	3,434,000	29,610,000	*12%*				£124,122,000	£1,037,300,000	*12%*
Total visits	**4,544,100**	**35,342,000**	***13%***	**4,320,300**	**23,854,000**	***18%***	**£422,817,000**	**£2,419,289,000**	***17%***

Devon Staying Visits (2019)

Devon Day Visits (2019)



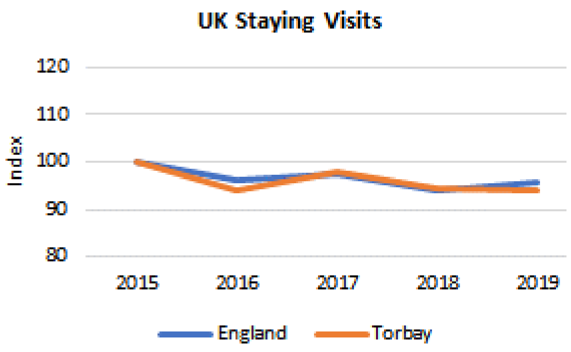


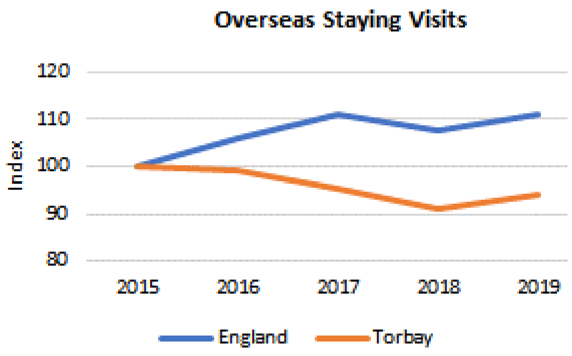
Source: Torbay-20F Economic Impact Data, The South West Research Company

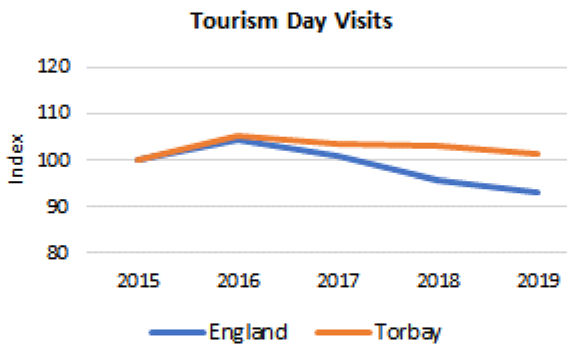
TOURISM TRENDS

The national trend in domestic overnight visits has been relatively flat in recent years. In 2019, British residents took 99.1 million overnight trips in England, with expenditure of £19.4 billion. Over the last decade, the volume of trips has fluctuated around the 100 million level, ranging from a low of 92.6 million in 2014 to a high of 104.5 million in 2012. The tourism day visitor market has seen trip numbers declining slightly in recent years. In 2019, 1.39 billion tourism day visits were taken in England, 8% below the level in 2011 and 11% lower than trip numbers in 2016. By contrast, the inbound market has experienced steady growth, with the number of overseas trips to England up by 36% from 26.5 million in 2009 to 36.1 million in 2019.

National trend data comes from the three national tourism surveys: the Great Britain Tourism Survey (GBTS), the International Passenger Survey (IPS) and the Great Britain Day Visits Survey (GBDVS). Unfortunately, directly equivalent data is not available at a district level (3-year averages are used and, unlike national-level data, district-level data has not been re-weighted following survey methodology changes in 2016). Therefore, the following charts use national surveys for England trend data and Torbay's Economic Impact reports for Torbay trend data. Whilst the methodologies are different, they provide a broad indication of recent tourism trends and suggest a broadly flat picture.







COMPARISONS WITH OTHER DESTINATIONS AND NATIONAL AVERAGES: AVERAGE SPEND, LENGTH OF STAY, HOLIDAY TRIPS

National, domestic tourism surveys (GB Tourism Survey and GB Day Visits Survey) can be used to provide comparisons with other destinations and with England as a whole. Sample sizes are small at a local level but the use of 3-year averages, combined with consistency in methodology across the country, allows useful comparisons to be drawn.

As is the case with many seaside destinations, a high proportion of Torbay's domestic overnight trips are for holiday purposes – 78% compared to the England average of 47%. Average length of stay is higher than the England average but lower than in the Isle of Wight, North Norfolk and Great Yarmouth. Average spend per trip is higher than the England average and similar to the Isle of Wight and North Norfolk.

Table 3: UK Staying Trips (3-year averages, 2017-2019)

District	Volume of trips (m)	Ave spend per trip	Ave spend per night	Average length of stay (nights)	% of trips for holiday purposes
Torbay	**0.762**	**£257.54**	**£64.83**	**3.97**	**78%**
Blackpool	1.137	£226.85	£79.88	2.84	86%
Bournemouth	0.752	£214.98	£71.81	2.99	64%
Brighton and Hove	1.144	£179.25	£74.63	2.40	48%
East Lindsey	1.311	£164.72	£41.76	3.94	80%
Great Yarmouth	0.545	£236.55	£52.48	4.51	85%
Isle of Wight	0.817	£255.30	£61.84	4.13	74%
North Norfolk	0.661	£260.08	£54.71	4.75	84%
Scarborough	1.365	£203.71	£60.37	3.37	82%
South Lakeland	1.459	£232.63	£71.39	3.26	82%
England	**99.03**	**£194.70**	**£65.32**	**2.98**	**47%**

Source: GB Tourism Survey, Visit Britain

Average spend for tourism day trips in Torbay is similar to the Isle of Wight but below the England average.

Table 4: Tourism Day Trips (3-year averages, 2017-2019)

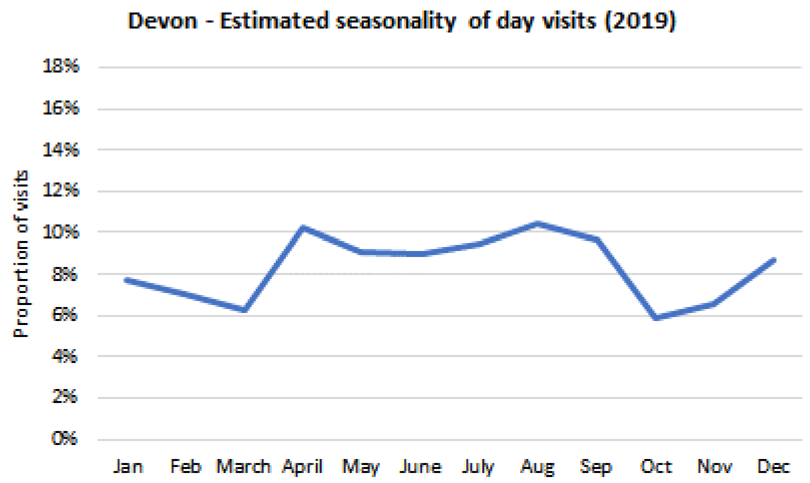
District	Volume of trips (m)	Ave spend per trip
Torbay	**4.7**	**£25.28**
Blackpool	8.1	£49.06
Bournemouth	6.6	£42.68
Brighton and Hove	11.7	£39.73
East Lindsey	11.7	£39.02
Great Yarmouth	5.2	£29.31
Isle of Wight	5.5	£26.02
North Norfolk	6.9	£20.80
Scarborough	9.1	£31.79

South Lakeland	7.6	£34.26
England	**1,442**	**£37.09**

Source: GB Day Visits Survey, Visit Britain

SEASONALITY

The following charts show the seasonality profile for staying and day visits to Devon. Monthly proportions are estimates provided as part of the South West Research Company's Economic Impact analysis. Unfortunately, monthly data is not available for Torbay. The summer peak is clear, notably for staying visits, with July and August accounting for 29% of the year's visits. Torbay may well have a greater summer peak. The National Coastal Tourism Academy's Coastal Tourism report (2016) refers to the critical issue of seasonality of overnight breaks to the seaside in Great Britain, with 36% of domestic overnight trips taking place in July and August, 74% between May and October.



Source: Data from The Economic Impact of Devon's Visitor Economy 2019, the South West Research Company Ltd

TOURISM RELATIVE TO OTHER SECTORS

Whilst national tourism surveys are designed specifically to analyse demand and spending by tourists, a look at national employment data is helpful in providing an indication of tourism's importance relative to other industries. ONS's Business Register and Employment Survey (BRES) is the official source of employee and employment estimates by detailed geography and industry. It is a sample employer survey that records a job at the location of an employee's work place. In 2019, tourism industry employment accounted for 18% of all industry employment in Torbay compared to 11% for England as a whole. The definition of 'tourism industry' used here is that used by Visit England and ONS for tourism sector economic analysis. A full list of SIC codes is provided at the end of this section. Note that tourism industry employment counts all employment within that tourism-defined SIC code. It does not allow differentiation between consumption by tourists and consumption by local residents.

Table 5: Employment in Tourism Industries, 2019

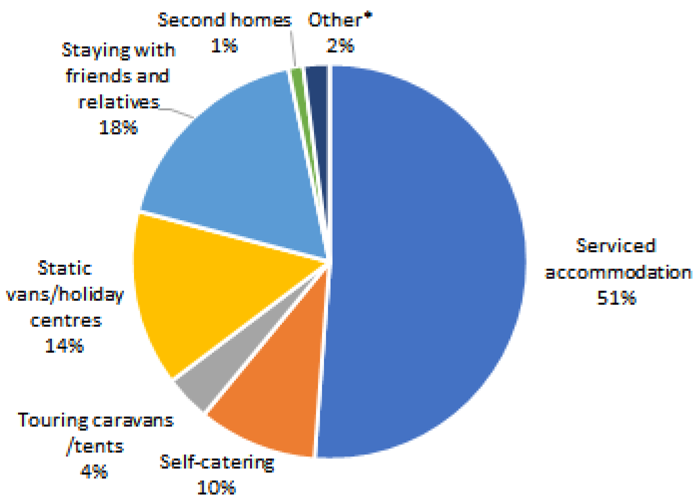
District	Tourism industry employment	All industry employment	Tourism Share
Torbay	**9,000**	**49,000**	**18%**
Blackpool	12,000	67,000	18%
Bournemouth, Christchurch and Poole	23,000	193,000	12%
Brighton and Hove	22,000	146,000	15%
East Lindsey	11,000	50,000	22%
Great Yarmouth	8,000	38,000	21%
North Norfolk	7,000	36,000	19%
Scarborough	9,000	47,000	19%
South Lakeland	13,000	57,000	23%
England	**2,908,000**	**27,154,000**	**11%**

Source: Business Register and Employment Survey, ONS

VISITOR ACCOMMODATION

Serviced accommodation accounts for over half (51%) of accommodation used by staying visitors to Torbay (UK and overseas). Staying with friends/relatives accounts for 18% of accommodation used. By comparison, the Great Britain Tourism Survey (2019) reports that 37% of domestic overnight trips in England involved staying with friends/relatives.

Torbay Accommodation Demand (2019)



**'Other' includes boat moorings, group/campus, paying guest in a private house*

Sources: Torbay-20F Economic Impact Data, The South West Research Company

TOURISM SIC CODES

Tourism Industries	SIC2007 code	Description
Accommodation for visitors	55100	Hotels and similar accommodation
	55202	Youth hostels
	55300	Recreational vehicle parks, trailer parks and camping grounds
	55201	Holiday centres and villages
	55209	Other holiday and other collective accommodation
	55900	Other accommodation
Food and beverage serving activities	56101	Licensed restaurants
	56102	Unlicensed restaurants and cafes
	56103	Take-away food shops and mobile food stands
	56290	Other food services
	56210	Event Catering Activities
	56301	Licensed clubs
	56302	Public houses and bars
Railway passenger transport	49100	Passenger rail transport, interurban
Road passenger transport	49320	Taxi Operation
	49390	Other passenger land transport
Water passenger transport	50100	Sea and coastal passenger water transport
	50300	Inland passenger water transport
Air passenger transport	51101	Scheduled passenger air transport
	51102	Non-scheduled passenger air transport
Transport equipment rental	77110	Renting and leasing of cars and light motor vehicles
	77341	Renting and leasing of passenger water transport equipment

	77351	Renting and leasing of passenger air transport equipment
Travel agencies and other reservation services activities	79110	Travel agency activities
	79120	Tour operator activities
	79901	Activities of tour guides
	79909	Other reservation service activities n.e.c.
Cultural activities	90010	Performing arts
	90020	Support Activities for the performing arts
	90030	Artistic creation
	90040	Operation of arts facilities
	91020	Museums activities
	91030	Operation of historical sites and buildings and similar attractions
	91040	Botanical and zoological gardens and nature reserves activities
Sporting and recreational activities	92000	Gambling and betting activities
	93110	Operation of sports facilities
	93199	Other sports activities
	93210	Activities of amusement parks and theme parks
	93290	Other amusement and recreation activities nec
	77210	Renting and leasing of recreational and sports goods
Country-specific tourism characteristic activities	82301	Activities of exhibition and fair organisers
	82302	Activities of conference organisers
	68202	Letting and operating of conference and exhibition centres

Source: Office for National Statistics

5. MARKET ANALYSIS

KEY POINTS

- The English Riviera has an incredibly high return visitor rate of 87%. Whilst this is a great achievement and should be acknowledged, it is an issue to consider when coupled together with Torbay's older age of visitor (60% aged over 55). There is an opportunity now to capitalise on the dramatically increased number of first-time visits post-Covid and keep the new and younger visitors returning.
- It currently attracts a predominantly domestic market but according to recent Visit Britain research, there is an opportunity to attract more European visitors to UK coastal destinations, particularly from Germany and possibly from the US market (but this market is not likely to recover until 2024/25).
- A high proportion of visitors travel to the destination by car. Not only does this have an impact on the destination's sustainability agenda but car travel is also the area in which satisfaction rates are lowest e.g. parking. This suggests there is an opportunity to improve public transport both to and around the destination.
- External perceptions are generally quite positive around the destination's traditional seaside offer but are often shrouded in negative undertones which can be off-putting for prospective first-time visitors e.g. Telegraph Travel's quote "if I squint – and ignore the chants of the lager-fuelled lads behind me – it [Torquay] could, at a push, be mistaken for St Tropez."
- Torbay performs well in each of the attributes its existing visitors seek in a destination but less well in some of those areas that are motivators post-Covid e.g. health and wellbeing and outdoor activities. Similarly, the main reasons for people choosing not to visit are lack of awareness and strong competition, particularly in the attributes that rank highly for them e.g. history, heritage and culture and nature and outdoors, suggesting there may be an opportunity to attract new visitors through greater promotion of the outdoor activity and cultural tourism offer.
- No target market segments were identified in the previous DMP or at the South West level. There is a need for the new DMP to identify clear segments to grow and maintain to provide focus for both marketing and product development activity. These are mapped out below.
- Despite increased awareness, people still don't know what the UNESCO Global Geopark is, presenting an opportunity to engage and promote it more. It needs to be clearly defined to all visitors, so they can understand how they can benefit and plan their trips. With its international status and reach, the UNESCO Global Geopark has the potential to reach new and untapped markets, attracting more visitors and spend to Torbay.

EXISTING MARKETS

Table 6: Existing Markets

Organisation and source docs	Existing Visitors			Commentary/notes/insights
	Trip type - Day/Staying/overseas – and frequency	Characteristics/Segment/ Profile	Motivations to Visit and Satisfaction Levels	
England's Coast Consumer Survey NCTA (Nov 2021) *A national survey measuring satisfaction levels in those who holidayed on England's Coast in 2021*	N/A	- 68% visited as a couple - 25% had children under the age of 18	- 87% thought their holiday was either excellent or good value for money. - 96% were satisfied with their coastal break. - 57% said they'd like to see more business open in winter. - The main motivations were relaxation, quality time with family/friends and to sightsee/explore. - 87% claimed that reducing their carbon footprint or making more sustainable choices on holiday was important; 45% are prepared to pay more for a sustainable option. - 74% said they'd like to return to the coast within the next year. - Most popular activities were walking the coastal path (63%) and spending time on the beach (68%).	- High satisfaction levels and propensity to return to the coast. - Consumers will visit the coast off season as long as there are things to do and businesses remain open. - Coastal walks are very popular (almost as popular as spending time on the beach). - General coastal visitors are more likely to be couples. - Offering locally sourced food and drink is important. - Sustainability is a concern with almost half of visitors willing to pay more for a sustainable option.

			▶ 43% would like to see more locally sourced food and drink. ▶ 89% would consider a break to the coast in the winter months.	
2021 Visitor survey (1,400 respondents)	▶ 88% staying overnight ▶ 5% day visitor from home ▶ 7% day visitor from holiday accommodation ▶ 82% visiting between July and September ▶ 89% repeat visitor, 1% first-time ▶ 92% holiday ▶ 41% staying in Torquay, 31% in Paignton, 14% in Brixham	N/A	▶ 54% booking accommodation 3 months or more in advance. ▶ 62% booked accommodation direct, 22% via an OTA. ▶ 86% are interested in outdoor activities but only 13% took part in any during their stay. ▶ 66% are interested in water-based activities but only 31% took part in any during their stay. ▶ The quality and range of accommodation, visitor attractions, places to eat and drink, wayfinding, attractions and general upkeep all score quite high with visitors. Car parking, nightlife and shopping score significantly lower. ▶ 69% would recommend English Riviera as a place to visit. ▶ 72% would definitely visit again with 25% having re-booked for 2022.	▶ Very high levels of repeat visitors - loyal visitors returning again and again and recommending the destination to others – key to maintain. ▶ Very long lead times – supports the high level of loyal repeats, booking soon after previous visit. ▶ High levels of direct accommodation bookings - loyal bookers perhaps. ▶ Shopping is the second most participated in activity (77%) but one of the lowest scoring areas in terms of quality and range. ▶ Outdoor and water-based activities are appealing to existing visitors but not something in which they have participated in during a visit, nor a main motivator to visit.
English Riviera	▶ 79% of visitors staying overnight	▶ 74% visiting without children.	▶ The top five types of attractions/places are Shops (75%), Cafes and Harbours	▶ Strong domestic market.

Visitor survey 2016	▶ 21% on a day visit (12% of which were on holiday, staying in Dawlish and 10% in Shaldon) ▶ Avg group size 2.64 ▶ 97% from the UK, 3% from overseas (predominantly Germany) ▶ 23% live within the South West (Bristol, Exeter, Gloucester, Plymouth, Taunton, Swindon, Bath), 75% live outside of South West (Birmingham, Cardiff, Nottingham, Sheffield) ▶ Half of all staying visitors choose to stay in Torquay, 28% in Paignton ▶ Average length of stay 4.76 nights ▶ 87% on a repeat visit ▶ 13% on a first time visit	▶ Day visitors (from home or whilst on holiday) more likely to be visiting with children. ▶ 54% ABC1s ▶ 60% aged over 55 ▶ Staying visitors slightly older than day visitors ▶ 79% of visitors arrive by car or van, 8% take the train	(70% each), Beaches (63%) and Restaurants (60%). ▶ The top five activities are Eating and drinking (84%), Shopping and a Short walk of up to 2 miles (72% each), Spending half a day or more on the beach (45%) and a Long walk of more than 2 miles (36%). ▶ Proportion of seafront visitation: Torquay seafront (79%) Torquay harbour (71%) and Paignton Seafront (67%). ▶ The most sought after attributes of a destination are Rest and relaxation (70%), Quality food and drink (67%) and A traditional seaside experience (62%). The least sought after attributes were Health and wellbeing activities (15%), Nightlife and evening Entertainment (16%) and Adventure activities (17%). ▶ High proportions of visitors felt that each of the attributes could be found during a visit to the English Riviera including Rest and relaxation (71%), Quality food and drink (69%), A traditional seaside experience (68%), Health and wellbeing activities (26%),	▶ Very high repeat visits – loyal visitors returning again and again and recommending the destination to others – key to maintain. ▶ Ageing visitor profile ▶ Very low first-time visits ▶ High levels of affluent ABC1 visitors. ▶ Good accessibility and popularity as a top UK seaside holiday destination - strong position in the Domestic holiday market. ▶ Hot spots and common areas of domestic visitor origin are The Midlands, North East, North West and main M1/M6/M5 motorway corridors. ▶ Torquay is the most popular of the three towns for staying visitors. ▶ Travel by car dominates but visitor satisfaction rates are lowest for services relating to car travel e.g. parking. ▶ Torbay performs well in each of the attributes its visitors seek in a destination but less well in

	▶ The Easter period saw the highest proportion of day visitors ▶ 89% on a leisure or holiday related trip ▶ 8% VFR		Nightlife and evening Entertainment (29%) and Adventure activities (27%). ▶ Overall enjoyment rated at 4.72 out of 5 (highest scores given for accommodation, shopping, places to eat and drink, attractions and beaches. Lowest scores given for value for money of evening entertainment and parking cost and quality of service). ▶ 5% of lapsed visitors said there was something specific about the English Riviera which had deterred them from visiting. 80% would be likely or very likely to visit again in the future. ▶ 32% of visitors in the resort were aware that the area had UNESCO Global Geopark status (40% were interested to find out more about it).	some of those areas that are motivators post-Covid. ▶ Torbay is very much seen as a 'seaside attraction' with the harbours and seafronts viewed as Torbay's biggest natural asset and why people are visiting the area. This ties in with the motivations. ▶ It isn't viewed as a destination for evening entertainment/nightlife. ▶ Opportunity to attract more day trips from holidaymakers. ▶ Opportunity to grow overseas market - particularly Germany.
Torbay Great Place Audience Evaluation Report	▶ Cultural attractions in Torbay typically attract a larger proportion of local visitors than tourists (58% locals, 42% tourists – 10% day trips and 32% overnight stays) ▶ High degree of variation in proportion of day visitors and tourists	▶ On average families make up 29% of visitors to cultural organisations and events in Torbay; the remainder are adult groups (56%), lone visitors (12%), or organised groups (3%).	▶ Visitor comments are generally very positive, with the most common words being 'Very', 'Good', and 'Love' – a positive response to the overall experience of cultural audiences at the varied organisations across Torbay.	▶ Torbay's cultural offer is important to its local population more so than tourists. ▶ Visitor satisfaction around Torbay's cultural offer is generally high. ▶ Opportunity for more of a cultural tourism offer.

	between the different cultural attractions. Torquay Museum, Torre Abbey, Torbay Poetry Festival, and Cockington Court all had over 50% tourist visitors.	▶ 45 - 74 year olds make up 55% of audiences ▶ 16 - 44 year olds make up an average of 24%		
Torbay Great Place Scheme, 2017-2020	N/A	N/A	▶ 82% of audience members and participants surveyed as part of the Eyeview cultural programme would recommend Torbay as a place to visit.	▶ Although one of the outcomes of the Great Place Scheme was for Torbay to be perceived as a cultural centre, locally, regionally and nationally, the absence of any visitor data since 2016 means it is difficult to determine whether the number of tourists that take part in culture activity has increased or not.
Towards 2030, Re-imagining the Visitor Economy in the South West	▶ The volume of international visitors is low to the South West but the value achieved per international visitor is high relative to competitors. ▶ The day visitor to the South West is spending	▶ 74% of the businesses surveyed in the development of this strategy said that they had seen a change in customer profile in 2020, with 45% recording an	N/A	▶ There is significant growth potential that can be leveraged by further strengthening the regional offer with a clear proposition for international visitors in key target markets, particularly focussed on influencing visitors that have chosen a visit to the UK but not

	significantly less than competitor destinations. ▶ The South West's most significant markets are the UK domestic overnight market and international visits from Germany, USA, Netherlands and more generally near Europe and long-haul English speaking.	increase in first-time visitors.		yet finalised their itinerary or are loyal / regular UK visitors.

MARKET TRENDS

Coming out of Covid-19

Global travel - The travel industry has suffered enormously as a result of the global pandemic – in June 2021 a United Nations Conference on Trade and Development (UNCTAD) report indicated that the crash in international tourism due to the Coronavirus pandemic could cause a loss of more than $4 trillion to the global GDP for the years 2020 and 2021. The estimated loss has been caused by the pandemic's direct impact on tourism and its ripple effect on other sectors closely linked to it. The report, jointly presented with the UN World Tourism Organization (UNWTO), says international tourism and its closely linked sectors suffered an estimated loss of $2.4 trillion in 2020 due to direct and indirect impacts of a steep drop in international tourist arrivals. The report warns that a similar loss may occur this year, noting that the tourism sector's recovery will largely depend on the uptake of Covid-19 vaccines globally.

Inbound travel - VisitBritain's (VB) most recent inbound research (September 2021) shows that inbound travel to the UK is beginning to recover with the number of inbound flight bookings to the UK now back to about 50% and arrivals at about 25% of 2019 levels. VB expects inbound tourism levels to return to around half of normal by mid next year. Oxford Economics forecasts a multi-speed recovery with most of the volume and value from Europe regained in 2023, stretching to 2024/25 for long haul markets.

According to VB, post-Covid, the most popular destinations are:

- Cities (Spain, Ireland, Nordics)
- Coastal (Germany)
- Multi-destination (Australia, Italy)

Domestic travel - 2021 has seen a Staycation boom due to the international traffic light system. Hotel occupancy levels have recovered to almost pre-pandemic levels across the UK (except London) and in some destinations, such as Wales, even higher. The medium-term outlook as to whether this will continue into 2022 is still clouded due to the returning ease of international travel and other impending financial hits such as the National Insurance hike and uncertainty around Universal Credit.

Business travel - According to a survey conducted by Deloitte[2], the extent to which business travel will make a comeback may be fairly modest in the coming years despite it being on the rise in the second half of 2021. Total spend in Q4 2021 is projected to reach somewhere between 25%-35% of 2019 levels. Research carried out for the business software company SAP[3] found that after a long period of restricted travel opportunities, 89% of people surveyed said they intend to mix business with pleasure by tacking untaken holiday days on to work trips.

One thing that is for certain is that the landscape has changed post-Covid and people have changed their perceptions of travel. In the short term, the tourism landscape will continue be influenced by the following factors:

- Importance of safety and hygiene measures in all elements of the visitor experience.
- Demand likely to be greater for socially distanced – spacious destinations. Rural areas, destinations with open/car-free public space, for outdoor activities and attractions, and for self-catered accommodation.
- Faster recovery in demand from families and those visiting friends and relatives.
- Marketing messages need to respond to evolving market concerns over next few years – not enough to say ‘come now’.
- Constraints on budgets and holiday time mean travellers want to find out as much as possible about their destination before getting there.
- Prevailing interest in staycations and trips close to home.
- Reassurance that there is enough and of the right type of things to do.
- Ease of booking either before or during the trip; clarity on terms and conditions, cancellations etc.
- Visit Scotland summed up “ Convenience, reassurance, value, inspiration and connection” are the new consumer drivers.

[2] Deloitte Corporate Travel Survey, 2021

[3] SAP Concur organization research, April – May 2021

Other Trends

In addition to the short-term Covid-related factors above, other global trends in tourism are also worth considering as these will influence travel patterns in the longer term:

Sustainability – A recent ABTA report[4] suggests that the global tourism industry accounts for 8% of greenhouse gases and that there has been a gradual increase in the consumer's concern for the environment. It noted that 38% of people in 2020 said they were more likely to choose one company over another based on a better environmental record and those agreeing that travel companies should ensure that their holidays help the local people and economy has risen to almost two-thirds (62%). Consumer Insight Consultancy BVA BDRC's annual survey of holiday trends 2020[5] supports this, showing that 80% would actively help to deliver sustainability standards at a destination and 61% would pay an additional fee to ensure sustainable tourism standards are met. Further, Euromonitor identify that 76% of consumers are more concerned about the environment since the Covid-19 pandemic.

However, BVA BDRC's 2021 research[6] showed that whilst the UK public, old and young, is concerned by climate change, sustainability only influences purchase behaviour at the margins; it will drive decisions but only if all other factors are equal and they will get the additional 'feel good' benefit at no extra cost. Realistically, although they are concerned by sustainability issues, they are looking to Government and corporates to sort it out because it is just too difficult for individuals. In the meantime, their desire for travel experiences is greater than their desire to commit to sustainable travel choices.

Wellness - Health and wellness have become extremely popular in recent years and is increasingly becoming a focus for dedicated wellness holidays such as yoga retreats, mindfulness, forest bathing and a wide range of products beyond spa breaks. Research from ABTA in 2020 revealed that GB adults are increasingly incorporating wellness into their holiday, with one in three (34%) people planning to take part in activities focussed on improving their wellbeing such as yoga, meditation, spa and holistic treatments or taking time away from tech[7].

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[4] ABTA Holiday Habits Report 2020

[5] BDRC Annual Survey of Holiday Trends 2020

[6] BDRC Clearsight report on Sustainable Leisure during Covid-19, June 2021

[7] ABTA online survey (total sample size of 2,081 adults) undertaken by YouGov Plc between 4th and 5th July 2019.

Multi-generational travel - Multi-generational groups, ‘Grandtravel’, and differently shaped, non-linear families are all increasingly prevalent. This was on the up before the pandemic, but the Covid-lockdown periods experienced in 2020 and 2021 highlighted the importance of sharing with family. Large group accommodation has been popular in 2021 and is likely to continue to be popular in coming years. This is also an important consideration for group of friends wishing to get together and rent large, multi-unit accommodation where they catch up on lost time together during the pandemic.

Ageing population - One of the most significant trends affecting destinations is the ageing population. As the Boomers mature, reach retirement, and have paid off their mortgages they are likely to remain one of the most significant travel markets for both domestic and international travel. Their interests are well documented, and they want to keep their body and mind stimulated and meet like-minded people. With 37% of the European population (age 15+) over 55 accounting for 39% of all private travel there is plenty of evidence to support the value of this demographic.

Experiential tourism – The Euromonitor International Megatrends report concludes that consumers are prioritising experiences over things, keen to engage more, and have enhanced, more emotional experiences while on holiday [8]. Visitors want to connect with a place and its people. For example, they might participate in a workshop, attend local festivals, or visit studios of local artisans. People are seeking local interactions and to support communities. Other recent research[9] found an emotional link between people and places that is often difficult to verbalise, but which is tangible and affects people psychologically and physically. Importantly people want to share their connection to a significant place with others. So, when we get it right, the visitors will do our marketing job for us. People are seeking experiences that combine fun /learning/self-improvement/well-being. They want local food, drink, crafts offered through independent businesses rather than chains.

Outdoor activity - One activity that grew significantly during 2020 was cycling. There are various statistics to support this including the UK Transport Secretary indicating that cycling increased by as much as 200% and Cycling Scotland indicating a 43% increase on the same period the previous year. According to the National Travel Attitudes Survey, as of May 2021 20% of cyclists were cycling more than they were before the pandemic, while 35% of walkers were walking more[10]. And the trend looks set to continue with 95% of those who are cycling more and 94% of those who are walking more

[8] Euro Monitor Quantifying Mega Trends; Experience More #IRL Reinvented

[9] Places That Make Us. National Trust. 2017

[10] Department of Transport, National Travel Attitudes Survey Wave 5, May 2021

planning to keep it up post pandemic. Watersports has also increased significantly with 3.9m people taking part in watersports in 2019[11]. During 2020 and into 2021 growth exploded during lockdown as the importance of health and wellbeing in the outdoors came to the fore and sales of personal watercraft (SUP, canoes, kayaks, wetsuits) grew significantly.

Technology trends - Social media is increasingly prominent in travel marketing with the public driving content creation. Video is the new currency for storytelling and Destination Management Organisations can only control their own content or channels; not content that is user generated. People will also expect technology to help control health risks whilst on the move with features such as virtual check in, online reservations and touch free payments.

Maximising behaviour - Visitors want to cram a lot into a short space of time, enjoying unique experiences across the day and into the evening. It is important that there is a range of quality experiences on offer that are sufficiently different from home. Inspiration and information about what there is to do, and how to access and book, is important.

Glampervan, road trips and solo travel - A trend for 2021 is hiring or owning a camper van. These are then upgraded to provide a moving 'glamping experience'. They are popular as they offer everything you need, neatly packed around you, self-sufficiency and the freedom to travel in your own literal bubble[12].

'Ooo' travel – the workation - Out of Office working – so many people are now not working from their traditional office setting during traditional office hours. People can continue to work from their holiday locations. Wi-Fi and connectivity is important for people so they can enjoy themselves whilst continuing to keep up to date at work.

Flexible booking policies - Of course, with cancellation being endemic over the last twenty months, many travellers are looking towards flexible booking policies and free cancellations. While most trips will be covered under travel insurance, it looks likely that people will lean towards hotels and packages

[11] Watersports Participation Survey. Arkenford 2019

[12] https://www.campinginbritain.co.uk/camping-news/2020-was-the-year-of-the-campervan-but-could-2021-be-even-busier-as-people-see-now-see-them-as-the-safe-way-to-travel/

with more accommodating cancellation policies to save the hassle of chasing up lost funds from insurers. Airlines are continuing to scrap some of their 'flight change' fees whilst hotel chains are allowing no-charge cancellations up to 24-hours prior to travel.

Budget vs extravagance - Both ends of the scale seem relevant in travel trends for 2021 onwards - some who have endured hardship will be looking for maximum value from travel, whilst others who haven't been able to spend, are looking for very high value experiences such as hiring private islands and jets.

EXTERNAL PERCEPTIONS

We have looked at a range of public information about the English Riviera including TripAdvisor, social media channels, national media articles and destination guides such as Lonely Planet. We have found that:

- The general public tend not to refer to 'The English Riviera' but rather the individual towns – Torquay, Brixham and Paignton.
- The individual destinations are typically described fondly by existing visitors and the media but with a bit of a 'rough around the edges' slant.
- Non-visitors tend to ask negatively-posed questions within review forums e.g. 'I've heard it's run down/tired, is that the case?'
- Loyal visitors are clearly ambassadors for the area and really 'sell' its traditional seaside offer.
- Non-visitors seem to be looking for justification that the area has good nightlife and a quality food and drink offer and artisan scene: the answer they get tends to be based around chain pubs and a poor dining offer.
- The area is often classified as a poor relation of other more vibrant destinations such as Cornwall, Brighton etc.
- Paignton is generally depicted as being run down and often likened to Blackpool.
- Torquay is typically perceived as the base for visits to surrounding areas e.g. Paignton, Dartmouth, Brixham.
- Brixham, whilst typically regarded in a positive light is often described as not more than a one-day offer and not worthy of a short break.
- Social media reviews left by visitors are generally positive and centre on cleanliness, beauty, relaxation and beaches.

The results of the 2016 Visitor Survey showed that non-visitors do not think they can find what they are looking for in a trip to the English Riviera and they score it lower against sought after destination attributes than existing visitors do – 61% thought it would have quality food and drink, compared to 69% of existing visitors, 63% thought it would be restful and relaxing, compared to 71% of existing visitors. The main reasons for not visiting are a lack of awareness and strong competition, particularly in the attributes that rank highly for them e.g. history, heritage and culture.

TARGET MARKETS

There are no specific target market segments identified in the **2017-2021 Destination Management Plan**. However, it does suggest that there are opportunities to grow the following groups/areas:

- Day visitors staying in other areas of Devon/South West are travelling up to 1 hour to Torbay whilst on their trips.
- UK staying visitors without children and in adult only groups.
- International visitors.
- Under 35's.
- Business/conference visitors.
- Screen tourists.

Towards 2030, Re-imagining the Visitor Economy in the South West, the newest prospectus released by the Great South West Tourism Partnership, outlines the following international markets as being particularly important to the area:

- Western European markets where there is huge interest and untapped potential, particularly among those interested in outdoor activities, heritage and culture. Primary – Germany and the Netherlands. Secondary – France, Spain, Italy and the Nordics.
- North America (US and Canada) - activity should focus on persuading visitors who are committed to coming to the UK anyway, to visit the South West and highlight sustainable ways to undertake their visit in order to limit their overall carbon footprint.

It also advises that product development should focus on the following areas as they have significant market growth opportunity:

- Accessible tourism
- Sustainable tourism
- Experiential tourism
- Activities and adventure
- Wellbeing

- Cultural tourism
- Business tourism

Market intelligence about growth markets (including trends habits, needs and expectations) is flagged as an area that requires more research across the South West.

A recent campaign run by the English Riviera BID Company in June 2021 targeted a range of audience segments including families, couples and the over 55's across traditional stay visitor areas such as the Midlands, Liverpool and Manchester and emerging locations such as Bournemouth, Reading and London.
The campaign generated an increase in visitors to the English Riviera website, particularly from a younger age group (25-34 year olds were +52.22% on the same period last year).

Target markets for the new DMP could include:

Table 7: Potential Target Markets

Target Market (VE/VB segment)	Description	Rationale	Key assets/attractors
Fuss Free Value Seekers – maintain	▶ Looking to holiday in England ▶ Seeking good value for money ▶ Likely to be Midlands-based ▶ Predominantly hotel accommodation ▶ Seeking good beaches	▶ Core market – key to maintain ▶ Improve seasonality – will visit outside of peak times	▶ Torquay and Paignton ▶ Harbour ▶ Beaches ▶ Value food and drink options
Fun in the Sun – maintain/grow	▶ Staying in-destination or on a daytrip from accommodation base ▶ Beaches play a starring role ▶ Looking for child friendly entertainment	▶ Likely to stay longer if they think there is enough to do to fill their time enjoyably ▶ Larger group size – multi-generational visits ▶ Likely to generate repeat visits	▶ Torquay and Paignton ▶ Beaches ▶ Paignton Zoo

	▶ Likely to stay in a caravan or campsite		
Country Loving Traditionalists - grow	▶ Looking for unspoilt countryside and clean and tidy environments ▶ Want to feel connected to history and heritage ▶ Importance of local and good quality food and drink ▶ Seeking good quality accommodation	▶ Largest VE segment at 30% ▶ Willing to spend if the quality is right ▶ Improve seasonality – will visit outside of peak times	▶ UNESCO Global Geopark and rural hinterland ▶ Smaller towns – Brixham ▶ Museums and Abbeys ▶ Coastline
German Explorers – grow	▶ Likely to be retired ▶ Looking to experience rural life and spend time in the outdoors ▶ Typically travelling as a couple ▶ Want to try local food and drink ▶ Learning about local history and heritage are important	▶ High propensity to visit England's coastal resorts ▶ Take multiple trips per year ▶ Willing to spend	▶ UNESCO Global Geopark and rural hinterland ▶ Coastline ▶ Museums, Abbeys, parks and gardens
Conference and Business Visitors	▶ Looking for quality business meeting, conference and training spaces within 30-50 mile radius of base ▶ Looking for balance of value for money and something distinctive	▶ Typically visit mid-week ▶ Will explore leisure offer too	▶ The Riviera Centre ▶ Outdoor offer and coastal location ▶ Accommodation options ▶ Proximity to motorway and Exeter airport

6. MARKETING ANALYSIS

KEY POINTS

- The positioning statement on the English Riviera website (and Visit South Devon and Visit Devon) lacks strength and impact, using a generic 'something for everyone' message. Developing a more targeted and distinctive positioning statement would help the destination stand out against competition.
- The destination is using a number of different straplines underneath its primary and established brand 'English Riviera' e.g. Naturally Inspiring, England's Seafood Coast, Devon's Beautiful Bay. Occasionally, more than one of these are used at the same time which, although complementary, can be confusing for the consumer and weaken the brand. When developing the overall position of the destination, consideration should also be given to the brand hierarchy of these sub themes that sit within it (and whether they should exist) so as to make the proposition clear to prospective visitors.
- The UNESCO Global Geopark status is often showcased within marketing material as a thing to do within the destination rather than a characteristic of the destination. It would have more emotional appeal and impact as an attractor if it were used as a wrapper for the destination.
- English Riviera has little prominence as a destination on both Visit South Devon and Visit Devon's marketing platforms and where it is mentioned, its positioning is not consistent. Individual attractions like Paignton Zoo have much more visibility - this is more than likely due to membership levels.
- Communications are very much in official DMO broadcast mode and could be made more engaging and authentic if official comms were interspersed with more business, resident and visitor input e.g. guest blogs and videos.
- On its website, English Riviera has developed some nice thematic content and interesting ways of packaging product e.g. 'England's Seafood Coast' and 'Agatha Christie Breaks'. There is opportunity to do more of this and to distribute that content more widely via owned and third party social channels.
- It is not immediately clear from looking at English Riviera's social media platforms what its social media strategy is. There is some nicely curated content which gets good levels of engagement but a lot of the activity is promotional and in broadcast, rather than in conversational mode which leads to low engagement. There may be an opportunity to build a greater Instagram audience using the visual nature of the destination and more features e.g. reels, stories, polls etc.
- There is little profile across English Riviera, Visit South Devon or Visit Devon marketing channels for the business and conferencing offer of the destination and where it does exist, it is not easy to find.

The following tables provide a snapshot of some of the key marketing channels used by the English Riviera BID Company, Visit South Devon, and Visit Devon.

Table 8: Marketing Delivery

English Riviera BID Company	
Positioning – Naturally Inspiring. A Great Time, Anytime. The warmest of welcomes awaits you on the English Riviera, South Devon's beautiful coastline. Surrounded by stunning coast and countryside, Torbay, including Torquay, Babbacombe, Cockington, Paignton and Brixham offer fantastic year round holidays with lots of things to do for everyone and with the opening of the South Devon link road it's never been easier to get here.	
English Riviera Website	English Riviera is the visitor facing website for the destination run by the English Riviera BID Company. With a lot of sub-headings contained within the nine main navigational headings, the content is not particularly streamlined or focused. However, there are some creative ways of theming and packaging product with nice video integration in parts e.g.: ▶ England's Seafood Coast ▶ Agatha Christie ▶ Naturally Inspiring Blog content, although regular, tends to be promotional or news-based in nature. It is generally in broadcast mode rather than offering viewpoints or being conversational in tone. There is nothing particularly unique or distinctive about the website - a sense of being all things to all people e.g. 'lots of things for everyone', 'all tastes and budgets', 'you will find everything in our little corner of Devon to suit your palate and budget'. There is some nice Instagram integration which gives a visual montage of the destination and conveys the 'naturally inspiring' message well.

	The quick book function (providing integration with booking.com) is a convenient feature for the user. There is some nice, clear walking content featured. The site is well used - the 2021 visitor survey showed that 86% of visitors surveyed had used the www.englishriviera.co.uk website to source information about their visit. There is little presence for conferencing and venue hire which is buried under the 'special occasions' sub navigation of 'Be Inspired'. It positions the English Riviera as having high class facilities, a wide choice of quality accommodation, being located 3 hours from London and a short drive from Exeter airport as well as offering a relaxing antidote to work and a choice of award-winning restaurants. For advice about booking a conference on the English Riviera, it directs visitors to the Riviera Centre website
Social Media Channels Facebook – 50,231 followers Instagram – 5,194 followers Twitter – 16.8k followers	English Riviera is fairly active on Facebook, Twitter (except a year break in content between Oct 2020 and Sep 2021) and Instagram, posting across all platforms approx. ten times per month. Content is quite transactional and predominantly in broadcast mode. There is some creatively curated content which gets good levels of engagement but some additional sharing and tagging of partner content would add another dimension to the feeds. Instagram followers are quite low. There may be an opportunity to build a greater Instagram audience using the visual nature of the destination and more features e.g. reels, stories, polls etc. It is not immediately clear what the social media strategy/purpose is and which channels are being used for what purpose. More thought should be given to this.

	The 2021 ERBIDCo. Visitor Survey showed that Facebook is by far the most used social media channel of those surveyed. It also showed that social media content has most influence on choosing things to do once in destination rather than as a motivator for destination or accommodation choice.
Newsletters	Visitors to the website are encouraged to sign up to the mailing list at multiple touch points but more encouragement could be given across social media. Interest areas are divided into 16 categories – could these be consolidated to key thematic areas?
Print: Pubs and bars guide (25 pages) Accommodation directory (88 pages) Cafes, Tearooms and Restaurants (52 pages) English Riviera Map	There is an extensive suite of literature many of which feel like a printed replica of the website – could these be consolidated? As per online messaging, the printed guides also give a 'something for everyone' positioning 'somewhere to suit every taste and occasion'.
Campaigns	Walking England's Seafood Coast is a live campaign being run by English Riviera. As part of the campaign, a newsletter has been sent to subscribers which presents different walks available in the destination, linked to its status as 'England's Seafood Coast' and under the banner 'English Riviera. Naturally Inspiring.' It sends readers to a dedicated landing page on the English Riviera website which showcases the walks available and the destination's reputation as being the 'Seafood Coast'. There are a number of positioning statements within this campaign which, although complementary in many ways, are confusing to the consumer. Consideration should be given to the overall position of the destination and the brand hierarchy of the sub themes that sit within it so as to make the proposition clear to prospective visitors. The 2021 Escape the Everyday Spring / Summer campaign saw some success in driving new traffic to the English Riviera website. The campaign ran across Facebook, Instagram, Google and the Google Display Network and

	generated traffic from a younger demographic than usual from locations such as London, Birmingham, Manchester and Sheffield.

Visit South Devon	
Positioning – the English Riviera is a 22 mile stretch of outstanding South Devon coastline consisting of seaside resorts, rocky coves, picturesque villages and warm weather, making it one of the top places to holiday in the UK. If you're not sure where we mean then the English Riviera is essentially the Torbay area, acclaimed by the Victorians for its sub-tropical plants, 'bracing' sea air and scenic waterfronts.	
Visit South Devon website	Visit South Devon is the visitor facing website for East Devon, Mid Devon, Teignbridge and the South Hams. It is run by Visit South Devon, a Community Interest Company and the official membership-based destination marketing organisation for South Devon. The English Riviera has very little profile on the website and is difficult to find unless actively searched for within the site or via the 'Places' section'. Its beaches are highlighted as the destination's main draw, along with Agatha Christie links and award-winning food and drink. There are no mentions of English Riviera as Naturally Inspiring or England's Seafood Coast. The site is built predominantly on listings with little curated content. There is a conference section but again, English Riviera isn't profiled specifically within it, though some of the specific venues are listed (not the Riviera Centre).

Visit South Devon Social Media Channels Facebook – 13,077 followers Instagram – 21.5k followers Twitter – 23.2k followers	There is slightly more prominence for English Riviera on Visit South Devon social media channels than on its website, though content is generally focused on the individual towns or specific attractions like Paignton Zoo rather than the destination as a whole. It has a low Facebook following and very little engagement on this platform. Instagram posts depict coastal and countryside aspects predominantly and get good engagement

Visit Devon	
Positioning – From stunning coastline and award-winning beaches to a wealth of visitor attractions and some great value accommodation, the English Riviera has all the ingredients for a fabulous holiday, any time of year. You'll find everything is on your doorstep – regardless of what your interests may be.	
Visit Devon Website	Visit Devon is the visitor facing website for the county of Devon. It is run by Visit Devon, the membership-based Destination Management Organisation for the county. There is more of a presence for English Riviera on the Visit Devon website than the Visit South Devon site, being referred to as 'the popular English Riviera' on the main home page, but still little profile overall. The site is built predominantly on listings. It has little in the way of curated content however 'dog friendly', 'eco-friendly' and 'history and heritage' emerge as key thematically presented content. English Riviera has some profile within these, for example with a mention of the Blue Plaque Trail in the 'history and heritage' section but they generally highlight individual business rather than destinations. The website has some nice features such as the video-led home page and direct booking functionality but is quite glitchy in parts.

	There is a conference section but again, English Riviera isn't profiled specifically within it, though the Rivera Centre is listed as one of nine featured venues. The site is well used - the 2021 visitor survey showed that 50% of visitors surveyed had used the Visit Devon website to source information about their visit to the English Riviera.
Visit Devon Social Media Channels Facebook – 36,510 followers Instagram – 36.1k followers Twitter – 53.2k followers	Visit Devon is very active across all social channels. There is little profile for English Riviera but there is good engagement with the content that does exist.

7. PRODUCT AUDIT

KEY POINTS

- We have identified six ‘signature experiences’ and associated ‘hero’ products – themed clusters that present distinctive features of the English Riviera as a visitor destination:
    - UNESCO Global Geopark – e.g. Kents Cavern, Berry Head Nature Reserve, Cockington Court and Country Park.
    - Beside the Sea – e.g. Boats and Harbours, Boat Trips, Seaside and Beaches, Seafood.
    - Family fun – e.g. Babbacombe Model Village, Paignton Zoo, Dartmouth Steam Railway, Babbacombe Cliff Railway, Bygones, Splashdown Quaywest.
    - Walking – South West Coast Path, Geopark Walk, John Musgrave Heritage Trail.
    - On the Water – Reach Outdoors adventure centre, Torquay Watersports, Shoalstone Outdoor Pool.
    - Heritage and Culture – Golden Hind Museum Ship, Greenway, Brixham Heritage Museum, Torquay Museum, Torre Abbey, Babbacombe Theatre, Agatha Christie Festival Week, Agatha Christie Literary Trail, Agatha Christie Mile.
- There are just over 31,000 visitor bedspaces in Torbay, approximately half in serviced accommodation, half in non-serviced accommodation.
- Torquay accounts for 71% of Torbay’s serviced bedspaces and 48% of self-catering bedspaces.
- Camping, caravanning and holiday park provision is located predominantly in Paignton, accounting for 88% of Torbay’s camping and caravanning bedspaces and 52% of holiday park bedspaces.
- Close to 1,500 ‘entire home’ rentals are available through Airbnb/Vrbo. A third of these are available full time.
- The Riviera International Conference Centre is the major conference facility in Torbay, with a capacity of 1,500 in its conference hall as well as 1,750 square metres of exhibition space in the exhibition hall.

SIGNATURE EXPERIENCES

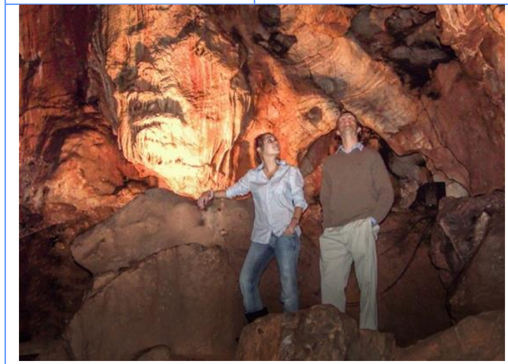
In the table below, we present six signature experiences for the English Riviera, together with their hero products. Hero products have been selected using the following selection criteria:

- Listed in travel guides/magazines/articles under best/leading/top 20 experiences of that type.
- Rates high in TripAdvisor and other similar platforms, relative to other similar places/sites/attractions in the region.
- Is part of a national network that gives it profile/positioning within certain markets, e.g. National Trust property.
- Has a national status that sets it apart/is a mark of quality, e.g. National Museum, National Trail.
- Has an international/national iconic status instantly recognisable from an image/its name.
- It has a strong presence/following on Instagram/Twitter/Facebook.

Whilst Torquay, Paignton and Brixham each have their own characteristics, the essence of the English Riviera can be experienced across Torbay. The family fun experience is most notable in Torquay and Paignton, whilst in Brixham it is the heritage and harbourside activity that stands out.

Table 9: English Riviera Signature Experiences

Signature Experience	Hero Products	Location	Description	Meets Selection Criteria?
UNESCO Global Geopark	Kents Cavern	Torquay	Extensive system of Stone Age caves, once occupied by prehistoric people and Ice Age animals.	UNESCO Global Geopark Key Site. No. 14 Trip Advisor Things to Do in Devon; No. 3, Trip Advisor Things to do in English Riviera
	Berry Head Nature Reserve	Brixham	Stunning headland with iconic lighthouse and Napoleonic Fort.	UNESCO Global Geopark Key Site. National Nature Reserve; Special Area of Conservation; Site of Special Scientific Interest; Scheduled Ancient Monument; No. 5, Trip Advisor Things to do in English Riviera

	Cockington Court and Country Park	Cockington	Quaint, English village with Saxon origins. Thatched cottages, visitor centre. 450-acre country park with 3 ornamental lakes, historic Manor House, craft centre and studios, 11th Century church.	UNESCO Global Geopark Key Site. No 7, Trip Advisor Things to do in English Riviera
				
Beside the Sea	Boats and Harbours	Torquay, Brixham, Paignton	Torquay, Brixham and Paignton harbours provide attractive, animated visitor environments, with a range of leisure and water-based activities.	Brixham Harbour – No. 20 Trip Advisor Things to Do in Devon; No. 4, Trip Advisor Things to do in English Riviera
	Boat trips	Torquay, Brixham, Paignton	Variety of boat trips available including ferries, leisure cruises, fishing trips, evening cruises, wildlife cruises, rib rides.	WeFerry – No. 8, Trip Advisor Things to do in English Riviera
	Seaside and beaches	Torquay, Brixham, Paignton	6 Blue Flag beaches, 4 Seaside Award beaches	Torquay ranked 3rd, Paignton 8th for best seaside towns in the UK for families, Day out with the Kids 2019.

				Goodrington Sands, Paignton Beach, Broadsands Beach, Breakwater Beach - nos 8, 11, 16 and 17, Trip Advisor Things to do in English Riviera
	Seafood	Torquay, Brixham, Paignton	Known as 'England's Seafood Coast'. Notably Brixham Fish Market. Seafood restaurants, tours, walking itineraries, annual Seafood Fest.	Several Brixham and Torquay restaurants listed in Trip Advisor's Top 20 Seafood Restaurants in Devon
				
Family Fun	Babbacombe Model Village	Torquay	Miniature world with 426 miniature buildings. Gardens.	No. 2 Trip Advisor Things to Do in Devon; No 1, Trip Advisor Things to do in English Riviera
	Paignton Zoo	Paignton	Zoo with over 2,500 animals across 80 acres. 400,000+ annual visits	No. 7 Trip Advisor Things to Do in Devon; No. 2, Trip Advisor Things to do in English Riviera

	Dartmouth Steam Railway	Paignton	Steam Railway from Paignton across Torbay coast to Kingswear. River and Sea cruises.	25,000 followers Facebook
	Babbacombe Cliff Railway	Torquay	Funicular railway built in 1926 between the gaps in the 73m high cliffs.	UNESCO Global Geopark Key Site
	Bygones	Torquay	Life-size Victorian Street, recreation of Victorian life, model railway, WW1 trench, 1950s and 60s shopping arcade.	No. 10, Trip Advisor Things to do in English Riviera
	Splashdown Quaywest	Paignton	Water Park with 8 flume rides	No. 26, Trip Advisor Things to do in English Riviera

Walking	South West Coast Path	English Riviera coast	A 22-mile section of the UK's longest National Trail (630 miles).	National Trail
	Geopark Walk	Multi-site	Themed walk incorporating a number of Geopark Key Sites.	UNESCO Global Geopark
	John Musgrave Heritage Trail	Maidencombe to Brixham	35-mile walk created by the Ramblers Association	Ramblers Association Trail

On the Water	Reach Outdoors	Paignton	Outdoor adventure centre offering coasteering, kayaking, paddle boarding	
	Torquay Watersports	Torquay	Rib rides, waterbikes, open water swimming	
	Shoalstone Outdoor Pool	Brixham	53m sea water pool on Brixham sea front.	Listed in '21 of Devon's best swimming pools, water parks and lidos' (DevonLive).

Heritage and Culture	Golden Hind Museum Ship	Brixham	Full sized replica of Sir Francis Drake's ship	Internationally known; No. 9, Trip Advisor Things to do in English Riviera
	Greenway	Brixham	Georgian House which was Agatha Christie's holiday home. Setting for three of her novels.	National Trust
	Brixham Heritage Museum	Brixham	Heritage museum housed in an old police station. Exhibits relating to Brixham's fishing industry.	UNESCO Global Geopark Key Site No. 15, Trip Advisor Things to do in English Riviera
	Torquay Museum	Torquay	Founded in 1844. Exhibitions and artefacts. Displays include a gallery dedicated to Agatha Christie.	UNESCO Global Geopark Key Site
	Torre Abbey	Torquay	800-year-old museum of history, art and performance housed in an Ancient Scheduled Monument. Art collections, exhibitions, workshops, gardens. Year-round events programme including Open Air Cinema Festival and Agatha Christie Festival.	UNESCO Global Geopark Key Site; No. 22, Trip Advisor Things to do in English Riviera
	Babbacombe Theatre	Torquay	Renowned local theatre	No. 13, Trip Advisor Things to do in English Riviera
	Agatha Christie Literary Trail	Predominantly Torquay	Walking trail incorporating a number of Agatha Christie landmarks.	Agatha Christie internationally known
	Agatha Christie Mile	Torquay	Heritage trail walk	Agatha Christie internationally known
	International Agatha Christie Festival	Various locations	Week-long festival held annually in September.	Agatha Christie internationally known
	English Riviera Airshow	Paignton Green	Weekend event in June. Aerial displays, family entertainment.	12,113 followers on Facebook

	Brixham Pirate Festival	Brixham	Pirate festival in May. Period re-enactors, theatrical performances, live music.	-
	BrixFest	Brixham	3-day festival in May with live music, cooking demos, craft activities, crabbing competitions, Dragon Boat Challenge, Children's Day, firework display	-
	England's Seafood FEAST	Various locations	2-week festival in September and October. Seafood-themed events including cookery demonstrations, coastal foraging trips, Brixham Fish Market tours.	-
	Paignton Festival	Paignton	9-day festival including the Riviera Classic Car Show, Paignton Carnival, firework display.	-
	Torbay Steam Fair	Brixham	3-day event in July and August. Steam engines, vintage and classic car demonstrations, military displays.	-
	Torbay Royal Regatta	Torquay	3-day festival in August organised by Royal Torbay Yacht Club. Competitive racing with over 100 yachts and dinghies. Fireworks display.	-

Source: Blue Sail online research

PIPELINE PROJECTS

Torbay has a number of projects under development or in planning. Many of these include new visitor accommodation:

- Park Hotel and The Lighthouse Paignton. 2 new hotels currently under construction and due to open in 2022. A new 4-star 165 bedroom Mercure and a 3 star 115 bedroom Ibis.
- Palace Hotel Torquay. Site cleared ready for development of £100m 5-star 248 bed resort property due for completion in 2023.
- Corbyn Head. Site currently vacant following demolition and proposals for a new hotel due to open in 2023 as a 4-star hotel with a rooftop bar.
- Premier Inn Harbour View hotel with 120 bedrooms on The Terrace, Torquay is currently under construction and due to open in 2022.
- Occombe Farm attraction is currently developing a play feature having recently re-developed a shop and café.
- Imperial Hotel plans recently approved for a luxury spa hotel development by Brownsword Hotels with 111 bedrooms.
- Early plans for continued development of Splashdown aquapark include further development of new indoor attractions (karting, play, climbing), new water slides and a younger persons water park.

Fit for the future sets out a strategy for the development of Torbay's town centres and with a Town Board in place and over £22m of funding allocated from the government's towns fund for Torquay a number of projects are already underway including public realm improvements. Longer term projects supporting land assembly, major sites, transport and gateway schemes will strengthen the overall visitor offer.

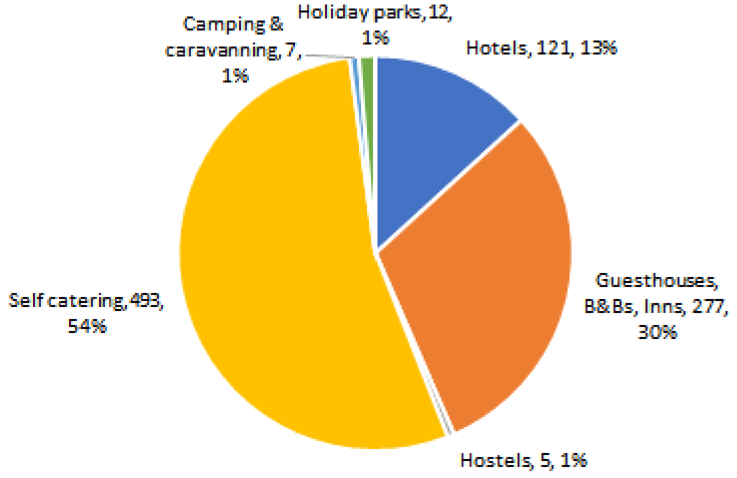
A further £13.6m was secured from the Future High Streets Fund to support the regeneration of Paignton town centre with proposals to improve flood defences and seafront infrastructure, improve the station and Torbay Road.

There are plans to improve bus connectivity through an Enhanced Bus Partnership between the council and local operators with bids to the Department for Transport of £24m to improve connectivity, night services, decarbonisation, lower fares, accessibility and linking facilities. In addition the council is making progress with an integrated approach to improving electric vehicle charging points across the area.

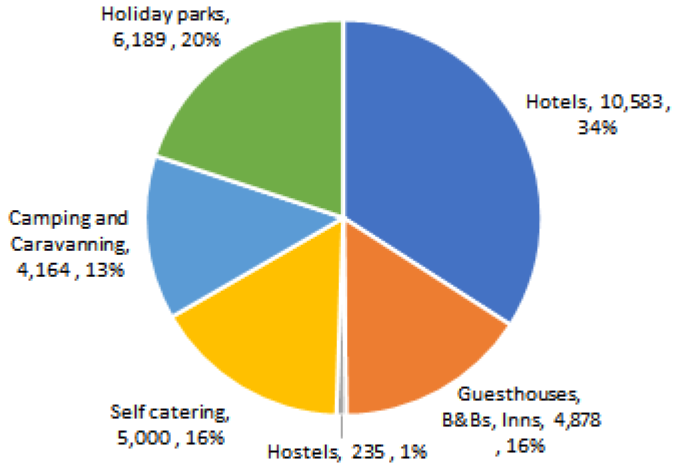
VISITOR ACCOMMODATION

There are 915 accommodation businesses in Torbay supplying just over 31,000 visitor bedspaces. Approximately half of the bedspace supply is in serviced accommodation, half in non-serviced.

Torbay Accommodation Supply (2019) - Businesses



Torbay Accommodation Supply (2019) - Bedspaces



Source: Torbay Accommodation Audit 2019, The South West Research Company

Torquay (including Babbacombe) accounts for 71% of Torbay's serviced bedspaces and 48% of self-catering bedspaces. Camping, caravanning and holiday park provision on the other hand is located predominantly in Paignton, accounting for 88% of Torbay's camping and caravanning bedspaces and 52% of holiday park bedspaces. In total, just under half (47%) of Torbay's accommodation businesses are located in Torquay, 29% in Paignton and 24% in Brixham.

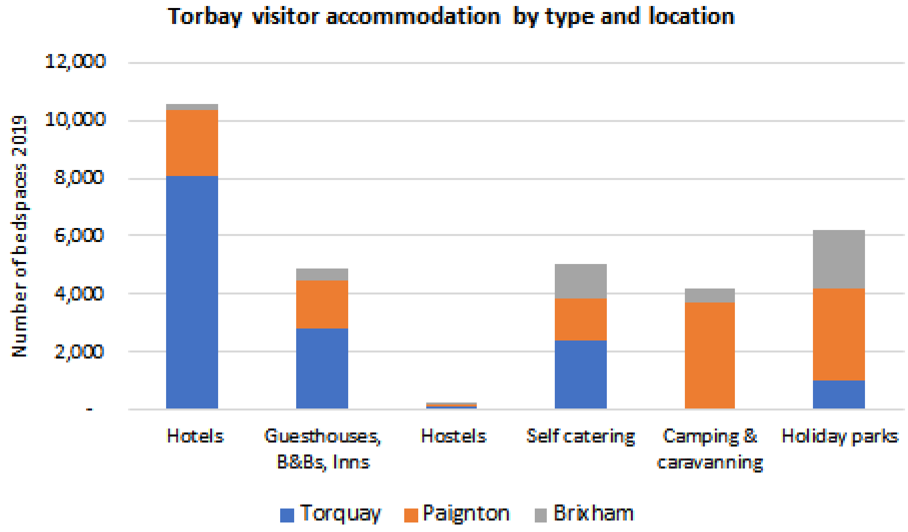


Table 10: Torbay visitor accommodation 2019

Visitor accommodation	Torquay	Paignton	Brixham	Total Torbay
Total businesses	434	265	216	915
	47%	29%	24%	100%
Total bedspaces	14,420	12,358	4,271	31,049
	46%	40%	14%	100%

Source: Torbay Accommodation Audit 2019, The South West Research Company

Sample of luxury accommodation

Englishriviera.co.uk provides comprehensive accommodation listings covering all types of accommodation, with options to filter by location, by type of break, and award winning. In the table below, we have highlighted a selection of luxury 4/5 star hotels. The selection is based on perusal of online sources including englishriviera.co.uk, booking.com, Trip Advisor and Telegraph Travel and is intended as a sample rather than a fully inclusive list.

Table 11: Selection of Luxury English Riviera Hotels and B&Bs

Hotel	Location	Description
Cary Arms and Spa	Torquay	5-star boutique hotel overlooking Babbacombe Bay. 8 sea-view bedrooms, 2 suites, 6 beach huts, 2 beach suites, 5 cottages. Spa.
Lincombe Hall Hotel and Spa	Torquay	4-star, adult-only hotel and spa. 44 bedrooms, 2 apartments.
OYO Orestone Manor	Torquay	Family-run, country house hotel and restaurant. 14 bedrooms.
The Meadfoot Bay	Torquay	4-star, 15-bed, adult-only hotel.
The Osborne Hotel	Torquay	4-star 33-bed boutique hotel. Health club, indoor and outdoor swimming pools, tennis court, landscaped gardens.
The Imperial Torquay	Torquay	Victorian 4-star hotel. 152 bedrooms, leisure club, indoor and outdoor swimming pools, spa.
The Grand Hotel	Torquay	Landmark, Victorian 4-star hotel. 132 bedrooms.
Belgrave Sands Hotel and Spa	Torquay	4-star, 50-bed hotel and spa.
Berry Head Hotel and Apartments	Brixham	4-star 32-bed hotel overlooking the sea at Berry Head Country Park. Gardens, petanque, croquet, indoor swimming pool, sauna and jacuzzi.
The 25 B&B	Torquay	5-star boutique 6 room B&B voted best B&B in the world in TripAdvisor's traveller choice awards 2019/2020.
The Albaston	Torquay	5-star luxurious 9 room B&B. Winner of the TV show 4 in a bed.
Court Prior	Torquay	4 rooms and a garden apartment.
Cimon	Torquay	12 rooms in elegant Victorian villa.

Source: Blue Sail online research

Airbnb

AirDNA (provider of short-term rental data for Airbnb and Vrbo) reports 1,464 'entire home' active rentals for Torbay and 241 private rooms. A third of properties are available full time. Satisfaction ratings are slightly higher for Devon than for Torbay.

Table 12: AirDNA data

	Torbay	Devon
Entire home	1,464	11,148
Private room	241	1,606
Total active rentals	**1,705**	**12,754**
Entire home rentals as percentage of total active rentals	86%	87%
% available full time	32%	39%
Average rental size (bedrooms)	2.2	2.4
Average rental size (guests)	4.7	5.1
Airbnb ratings (% at least 4.5 overall)	86%	90%
Average daily rate	n.a.	£125

Source: AirDNA

CONFERENCE VENUES

The Riviera International Conference Centre is the major conference facility in Torbay, with a capacity of 1,500 in its conference hall as well as 1,750 square metres of exhibition space in the exhibition hall. In addition, a number of hotels offer meeting rooms and conference facilities. A selection of the larger-capacity venues is presented below.

Table 13: Selection of English Riviera Conference Venues

Venue	Location	Rooms, capacity
Riviera International Conference Centre	Torquay	10 meeting rooms, conference hall (capacity 1,500), exhibition hall/arena (1,750 sq. m).
The Imperial Torquay	Torquay	9 meeting rooms, maximum capacity 350.
The Grand Hotel and Spa	Torquay	5 meeting rooms, maximum capacity 250.
Livermead Cliff Hotel	Torquay	Conference room, maximum capacity 200.

The Berry Head Hotel	Brixham	4 meeting rooms, maximum capacity 270.
TLH Leisure Resort (3 hotels)	Torquay	10 meeting rooms, maximum capacity 250.
Torre Abbey Historic House and Garden	Torquay	Meeting and function rooms, maximum capacity 350.
Hampton by Hilton	Torquay	New meeting space due to open spring 2022 with theatre style space for 80.

Source: Blue Sail online research

8. BENCHMARKING

KEY POINTS

We have looked at benchmarks and best practice insights from different destinations around six key themes emerging from our baseline work to see what lessons the English Riviera can learn. These are:

- **The natural environment and UNESCO Geopark** - to understand how two other destinations, the Isle of Wight and the Jurassic Coast, are using their UNESCO status as a wrapper for the destination; how they're applying that designation to the visitor offer; and how they're making it meaningful to visitors and prospective visitors.
- **Food and drink market and pop-up experiences** – to get a sense of how previously derelict buildings and empty spaces in Brighton and Liverpool are being used to create hives of activity centred around local food and drink.
- **Watersports and activity** – to see how three other destinations in Pembrokeshire, Sussex and Devon have developed new watersports hubs bringing together activity and food and drink in sociable seafront venues.
- **Culture and heritage** – to look at how other destinations (Belfast, Great Yarmouth and Blackpool) have extended their cultural offer to visitors as well as locals.
- **Events** – to understand how flagship events in other destinations such as Ireland's Ancient East and Galway, have been used to add to the overall distinctiveness of the destination and to extend the season.
- **Public realm and seafront development** – to see how waterfront areas in Folkestone and Hartlepool have been animated through new developments and how those developments have connected together multiple spaces to create a dawn to dusk offer.

The tables on the following pages present areas of good practice within each of these examples and highlight what lessons English Riviera can learn from them.

THE NATURAL ENVIRONMENT AND UNESCO GLOBAL GEOPARK

What it does well	Learning for English Riviera
Isle of Wight	
Isle of Wight was declared a UNESCO Biosphere in 2019. To date the focus on the tourism side has been to use the Biosphere status as a stamp of a high quality environment and to underline the opportunities to explore that natural environment sustainably on foot or on a bike.	
▶ It uses the Biosphere status as a mark of quality and added value linking existing quality natural environment experiences to the new designation. In particular, it uses the Biosphere designation to underline the quality of its stargazing experiences and Slow Travel. ▶ It explains what Biosphere means to its visitors simply and clearly on its website and provides hyperlinks to more information where appropriate. ▶ It provides a joined-up visitor experience in the natural environment that facilitates planning, participation and choice e.g. an app with cycle and walking routes incorporating attractions and places to stay, maps and user reviews. ▶ It encourages and incentivises tourism businesses to value the environment via a green star programme that also helps visitors know which establishments support slow travel and other environmental actions.	▶ Use the UNESCO Geopark as a way to demonstrate and promote existing experiences in the natural environment in ways that reinforce the high quality of the environment – the English Riviera could look for opportunities in existing routes and trails to 'badge' them with the UNESCO Global Geopark. ▶ Ensure there is a critical mass of joined up natural environment experiences for visitors to choose from to demonstrate credibility – the English Riviera needs more choice and to bundle existing offers together to present easy ways for visitors to explore the environment and understand what the UNESCO Global Geopark status means in the destination. ▶ Incentivise tourism businesses to get involved and to demonstrate how to do that and what the benefits are – to encourage businesses to develop more natural environment experiences requires strategic support to show the benefits and opportunities.
Jurassic Coast	
The Jurassic Coast stretches 95 miles along England's South West coast from Exmouth in Devon to Swanage in Dorset. It became a World Heritage Site in 2001 for the outstanding universal value of its rocks, fossils and landforms.	
▶ It celebrates the UNESCO World Heritage Site status it has been given by explaining on its website 'what's in it' for a prospective visitor and making it meaningful to them. There are clearly defined sections of information including:	▶ Develop clear and compelling messaging that positions the destination as the UNESCO Global Geopark and makes that concept meaningful to prospective visitors at every touch point within the visitor journey.

• What is so special about the geology here? • What's in it for me? (describes the landscape and invites the visitor to explore the Coast) ▶ Visitdorset.com uses the strapline 'Home of the Iconic Jurassic Coast' giving prospective visitors the idea that they are going to experience something of real significance with a visit to the destination.	

FOOD AND DRINK

What it does well	Learning for English Riviera
Shelter Hall, Brighton	
Shelter Hall is situated on Brighton's seafront in a formerly derelict 15,000 sq. ft Victorian building. It is a pop-up food market that brings together seven independent kitchens and a bar, split over two indoor floors and an outdoor terrace.	
▶ It is 'in and of' Brighton with a real emphasis on 'local' - its chefs, food, drink and live music talent are all sourced locally. ▶ It offers emerging chefs the opportunity to have a four-month residency opening their first physical space and gain access to up to 100,000 customers at the venue including mentorship and training. ▶ Ordering is almost exclusively digital - guests can choose from dine in, delivery or collection options, all ordered through the Shelter Hall app. ▶ For Christmas 2021, it will be offering private heated winter igloos complete with a terrace sea view.	▶ Use for vacant premises ▶ Use food experiences to support the overall authenticity and positioning of the destination by having a distinct local emphasis. ▶ Be creative in programming to help drive footfall to the seafront throughout the year. ▶ Build in community support opportunities e.g. supporting local start-ups and offering opportunities increasing skill capacity within the community.
Duke Street Market, Liverpool	
Duke Street Market opened in the heart of Liverpool city centre in 2019. Self-described as a 'social eating concept', it features six resident kitchens providing individual food concepts, a coffee kiosk, and bar within the shell of a restored 100-year old warehouse covering 5,000 sq. ft.	
▶ It focuses on quality – produce, service, facilities – and 'theatre' of food. ▶ It is ambitious to become the north's best culinary food tourism location. ▶ It is positioned as an 'all day dining destination'. ▶ It caters for families with the incorporation of a children's play area. ▶ It has dynamic opening times, reducing days during autumn/winter. ▶ It is very active on social media, particularly Instagram, tagging the wider destination. ▶ The terrace area has recently been converted to a room for private hire. ▶ It runs health and wellbeing yoga events in a morning pre-opening with the option to pre-book lunch.	▶ Use culinary experiences to enhance both the day and night-time offer. ▶ Appeal to a family audience as well as adult groups and couples through the inclusion of family areas and facilities. ▶ Scale up and down if necessary during peak/off-peak seasons. ▶ If engaged with the destination, food markets have the potential to help promote the wider destination, particularly on social media. ▶ With the incorporation of a private hire space, food venues can support the corporate offer of the destination.

WATER SPORTS AND ACTIVITY

What it does well	Learning for English Riviera
Loop Watersports @The Beach, Littlehampton	
Loop Watersports is a watersports provider in Littlehampton, West Sussex, offering tuition and hire services for a range of water-based activities. It was founded in 2020 and is located in The Beach, a new venue which houses a café and activity centre.	
▶ In a council-owned building, it brings together multiple partners and activity providers, from bakers to activity suppliers, under one roof with a shared mission to achieve a more active and social community. ▶ It encourages people to learn a new sport or develop existing skills as well as create a place visitors can socialise and become part of a community.	▶ Develop seafront spaces through working with new and existing businesses to drive footfall and revenue to typically under-used spaces. ▶ Use as an opportunity to tie in the health and wellbeing agenda for local residents with a lucrative tourist offer.
Coppet Hall Beach Centre, Pembrokeshire	
Coppet Hall Beach Centre is a recent development by The Hean Castle Estate in Saundersfoot, Pembrokeshire. It is a new building (standing on the site of the former Coppet Hall Hotel and public conveniences) that contains a restaurant, watersports retail and activity centre in addition to new public conveniences including family changing spaces and external beach showers.	
▶ The Beach Centre is an environmentally friendly building - solar panels, air source heat pumps, a sedum roof, and improved footpath and cycling access all contribute to its BREEAM 'Excellent' rating, one of the highest levels of environmental rating for new buildings. ▶ The restaurant 'Coast' focuses on using local ingredients and is recommended in the Michelin Guide. ▶ It was funded by a mix of private and public investment and formed part of Visit Wales' Coastal Tourism Project, part funded by the European Regional Development Fund through the Welsh Government, to encourage tourism along the Welsh coastline.	▶ Tie in water-based activities with a high quality and distinctive food and drink offer to make more of traditional seafront spaces which typically generate little income. ▶ Build in sustainability into new projects, particularly walking and cycling access. ▶ Secure private investment to leverage public funding for new mixed-use developments.

<table>
<tr><th>What it does well</th><th>Learning for English Riviera</th></tr>
<tr><td colspan="2">Sideshore, Exmouth</td></tr>
<tr><td colspan="2">Sideshore is a community-owned watersports centre in Exmouth. It opened in 2020 and was built as a not-for-profit development for the benefit of the local community.</td></tr>
<tr><td>

As well as a watersports centre offering equipment hire, lessons and wellness activities, the development includes a casual seafront bar, restaurant and café run by Exeter celebrity chef Michael Caines.
It is managed locally as a Community Interest Company (CIC) made up of representatives from the local area whose sole aim is to use profits for the benefit of the Exmouth area.
It aims to be the most sustainable building it can possibly be - all tenants have signed ‘’green leases’’ to ensure there is a ban on all single use plastics, twice as many solar panels were installed than the recommended coverage to generate as much renewable energy as possible, EV charging points and bike racks have been installed to encourage greener modes of transport, construction was undertaken by a local firm using 100% local staff.

</td><td>

Build sustainability into new projects to help encourage greener modes of transport.
The formation of a CIC to run an activity centre shows a commitment to its role within the local community as well as providing a space and offer for visitors.
Create a lively and sociable space with food, drink and activities to help extend hours spent at the seafront and enhance the night-time economy.

</td></tr>
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CULTURE AND HERITAGE

What it does well	Learning for English Riviera
Belfast	
In 2020, Belfast launched a new ten year cultural strategy 'A City Imagining' to realise the city's full creative potential.	
▶ It recognises that culture can drive transformation. ▶ It doesn't define culture too closely ▶ It is realistic, setting just three key milestones: • Bidding for UNESCO city of Music 2021 • Hosting a year-long celebration of culture in 2023, co-created by local people for themselves and visitors to enjoy • Creating a new destination 'Hub' visitor attraction in the city acting as a cultural beacon and area of orientation for visitors into NI. ▶ It strategically invests in culture through the development of a cultural investment programme to support the delivery of strategic priorities set out in *A City Imagining* including public-private forms of investment. ▶ It focuses on inclusive growth, informed by an in-depth public engagement programme ▶ Creates a focal point by manifesting culture within a distinct part of the city, The Cathedral Quarter - a rejuvenated trade and warehousing district that claims the best bars, restaurants and galleries in the city.	▶ Be realistic in what can be achieved and don't be too prescriptive around the definition of 'culture'. ▶ Take the local community with you on the journey through an in-depth public engagement programme to ensure inclusive growth. ▶ Elevate the destination's cultural offer by creating a physical manifestation of it i.e. a destination hub visitor attraction and a specific cultural Quarter in this instance. ▶ Use designations – including 'year of' to focus efforts and encourage collaboration
Great Yarmouth	
Great Yarmouth's cultural history is linked to the sea, beautiful beaches, historic buildings and being bordered by the unique Broads National Park. Despite its unsuccessful bid to the UK City of Culture 2025 longlist (joint bid with East Suffolk), it is ambitious to become a key cultural destination and in 2020 launched a new ten-year Culture, Heritage and Tourism strategy 'Our Place is Your Stage'.	
▶ It has formed a Great Yarmouth Culture and Tourism Board including the Greater Yarmouth Tourism and Business Improvement Area, Great	▶ To really become a cultural destination, culture needs to be positioned at the heart of all regeneration activity, particularly public realm.

Yarmouth Preservation Trust, Norfolk Museum Service, Out There Arts, St George's Trust, and arts and cultural partners. ▶ It positions its cultural offer at the heart of all regeneration activity. ▶ It has plans in place to activate its economic recovery by re-inventing its public places - retaining its rich heritage and tapping into and growing its arts and cultural scene. Plans include: • The restoration of its iconic Winter Gardens, the UK's last surviving Victorian cast iron and glass pavilion of its type, to bring it back into public use as a year-round visitor attraction, making the most of the unique building, its seafront location and its horticultural heritage. • A new Marina Centre community leisure complex, on the resort's Golden Mile - a major year-round boost to the area and support health and well-being for all over the next 40 years. • A trail of street art developed in Great Yarmouth and nearby towns and a legacy of street artists working with young people.	▶ Culture and tourism are good bedfellows and benefit local communities as well as helping to attract and satisfy visitors. ▶ Develop a trail-orientated culture project across the individual towns working with local people to bring the towns and communities together and to encourage people (visitors and communities) to explore each of them. ▶ Invest in previously popular and iconic venues attract new and returning visitors.
What it does well	**Learning for English Riviera**
Blackpool	
Blackpool's CultureBlackpool project showcases and highlights the cultural offer that currently exists in-resort to visitors and residents.	
▶ It has created a new partnership between public and private sector partners to promote Blackpool's back story of architecture, heritage, exhibitions, internationally acclaimed installations and events to its 142,000 residents and 18 million visitors. ▶ It has launched a new *B/Side* Campaign in a bid to flip expected perceptions of Blackpool and persuade people to 'tune in', look up and around and to appreciate the cultural side of the resort. ▶ Plans to create the town's first museum will tell the story of the city's contribution to the UK's popular culture.	▶ Launch a new culturally-focused marketing campaign to help change expected perceptions of the destination - bringing together cultural partners from the public and private sector in its delivery. ▶ Elevate the destination's cultural offer by creating a physical manifestation of it i.e. the town's first museum in this instance. ▶ Ensure that new and refurbished large scale conference venues have a link, either physically or contextually, to the cultural offer of the destination.

▶ It has opened a new state of the art conference centre that links directly to the refurbished Empress Ballroom and Opera House in the Winter Gardens.	

EVENTS

What it does well	Learning for English Riviera
Galway International Oyster Festival	
Galway is renowned for its vibrant lifestyle and for hosting numerous festivals such as Galway International Oyster Festival, an annual free event held on the last weekend of September in the centre of the city attracting tens of thousands of visitors. According to Tourism Ireland, it has been called "one of the greatest events on earth".	
▶ The event has an intimate association with the destination, celebrating regional produce - the harvest of the native oyster. ▶ It is held outside of the peak season so helps with spreading visitor numbers throughout the year. ▶ It encourages businesses – restaurants and producers - to take part to add to the visitor experience but also to benefit from the surge in visitors to the destination during the weekend.	▶ Hold key events during the shoulder months to help extend the season. ▶ Include the name of the destination within the title of the event to connect the theme with the destination in people's minds. ▶ Use events as a way to work with, and benefit, businesses.
What it does well	**Learning for English Riviera**
Estuary Festival, Kent	
Estuary is a large scale arts festival celebrating the lives, landscapes and histories of the Thames Estuary. Taking place over 23 days in May and June, the mix of large scale and intimate visual art, literature, music and film celebrates culture, creativity, recovery and renewal.	
▶ Through carefully placed contemporary artworks and performances, the festival invites and encourages visitors to explore (walk, drive or via public transport) the coastline of South Essex and North Kent taking in the landscape, historic sites and coastal towns. ▶ It is led by a partnership between estuary-based arts organisations, Metal (South Essex) and Cement Fields (North Kent). ▶ It includes community activities.	▶ Use events as a way to encourage exploration and disperse visitors across the destination, as well as encouraging the use of public transport. ▶ Include elements and activities specifically for the local community to instil civic pride as well as increase visitation. ▶ Events offer an opportunity for new ways of partnership working between existing organisations within a destination; they do not have to be delivered solely by the local authority.
Puca Festival, Ireland's Ancient East	
Puca Festival is a 3-day festival of music, fire, feasting and mischief celebrating Samhain, Ireland's ancient Halloween tradition. It is a multi-destination event held across four sites within Ireland's Ancient East – Slane Castle, Athboy, Trim and Drogheda.	

▶ It is a vibrant and contemporary festival, yet strongly rooted in tradition. ▶ It embraces the wealth and quality of the local produce on its doorstep – whisky, seafood, locally raised meat and natural honey - making food and drink a star of the show. ▶ It has been developed by Fáilte Ireland (the National Tourism Development Authority of Ireland), in partnership with Meath and Louth County Councils. ▶ It provides visitors with a unique reason to choose the destination. ▶ It is held out of season and so drives visitors at a typically quieter time of year.	▶ Use multi-location events as a way to unify the destination under one flagship visitor experience. ▶ Hold key events during the shoulder season to help extend the season. ▶ Food and drink can play a significant role even if not the primary theme. ▶ Develop a unique event to help overcome competition - it gives visitors a reason to choose one destination over another despite similar core offers.

PUBLIC REALM AND SEAFRONT DEVELOPMENT

What it does well	Learning for English Riviera
Folkestone	
In 2004, Sir Roger De Haan set up the Folkestone Harbour Seafront Development Corporation. With a multi-million-pound investment, the Corporation developed a seafront masterplan for Folkestone which included the Folkestone Harbour Link project – a transformation of Folkestone's declining listed Harbour Viaduct, Swing Bridge and Station into a pedestrian and cycling green link to connect the Harbour Square and town beyond to the South Quay.	
▶ It has seen the sensitive regeneration and transformation of historical harbour assets into high quality, usable public realm. ▶ It has respected and enhanced the heritage value of the existing assets and their cultural significance to the town. ▶ It has created a pedestrian link and 'green corridor' between the town and the existing Harbour Arm. ▶ It has reinvigorated a neglected part of town and revived its character. ▶ It has won awards - 'Special Judges Award for Sustainable Regeneration'. ▶ It offers a viewing platform midway, fitted with benches made from oak sleepers, offering the opportunity to pause to enjoy views of the chalk cliffs and the headland of Copt Point to the east. ▶ It has leveraged public funding including a grant from the Regional Growth Fund, support from the South East Local Enterprise Partnership, Kent County Council and Shepway District Council.	▶ Use private investment to leverage public funding. ▶ Add to the culture and heritage offer of the destination whilst providing a functional use. ▶ Encourage movement between spaces on foot or bicycle – and places to pause. ▶ Build sustainability into new projects to help encourage greener modes of transport and movement. ▶ Curate moments of interaction with the wider landscape of the destination.
What it does well	**Learning for English Riviera**
Hartlepool	
Hartlepool Borough Council has set out ambitious proposals for the tourism-led regeneration of the five-acre Hartlepool Waterfront area. The long-term plan is to develop the Waterfront as a landmark destination with a mix of civic, cultural, leisure and visitor attractions to complement the restaurants, cafes, bars and shops within the wider Hartlepool Marina area and to unlock the full potential of Hartlepool's visitor economy. Initial improvements to public realm include a walkway, a sculpture trail, seating, green spaces, coastal planting and new LED lighting providing a statement of intent for the future transformation of the site.	

▶ It aspires to create a venue providing fun family days out throughout the year, while also providing for specific planned larger scale events. ▶ It builds upon the visitor offer at the National Museum of the Royal Navy (Hartlepool) creating new development across the whole Waterfront site. ▶ It builds upon Hartlepool's profile as a major leisure and visitor destination of regional and national significance. ▶ It plans to create a stretch of high-quality public realm along the south side of the waterfront, connecting people to the historic Highlight monument.	▶ Build in flexible large-scale events space to future public realm developments. ▶ Raise profile of existing built heritage and visitor offer through improved connecting spaces. ▶ Use new high quality public realm to help overcome negative perceptions of the existing built environment and add to the overall profile of the destination.

9. CONSULTATION AND ENGAGEMENT

CONSULTATION

As part of our work, we interviewed a range of different stakeholders identified by the client. Here is a summary of views expressed categorised into positive attributes and opportunities, and challenges and issues to be overcome.

Opportunities and Positives	Challenges and Issues
▶ Capital funding programmes and major 'place shaping' investments underway. ▶ Tourism is important in contributing to the quality of life, services and facilities for residents – that message could be communicated better. ▶ Thinking Place storybook provides a great opportunity to align positioning and messages. ▶ Creative and innovative use of planning policies could be used to support investment, transition and public realm improvements; including uses for vacant premises and sites. ▶ Opportunities around wellness, eating out (seafood in particular), activities. ▶ Beaches, marine and sea-based activities are excellent. ▶ Harbour areas and waterfronts are seeing investment – and still more opportunity. ▶ UNESCO Global Geopark – using the designation better, telling the story and providing ways to experience it is a significant opportunity. ▶ Connection to beautiful natural environment and landscape – Dartmoor. ▶ Investment in culture and events (£700K over next few years). ▶ Investment by private sector in new quality hotel accommodation. ▶ Brixham has strong independent sector and distinctive character.	▶ Attracting new, higher spending markets. ▶ Extending the season beyond main summer period. ▶ Broadening the offer beyond seaside. ▶ Lack of quality across the visitor experience. ▶ Town centres of Paignton and Torquay suffering neglect, vacant premises, weak retail and poor public realm. ▶ Designation of certain areas for visitor accommodation has led to over-supply, poor quality and challenges in transition. ▶ Historically been a lack of shared ambition – and reluctance to change. ▶ Bureaucracy and lack of leadership within council constrains ambition, speedy decision making, investment and innovation. ▶ Environmental constraints could be a challenge to growth. ▶ Some confusion around English Riviera brand –what is it, where is it – possibly feels a bit old-fashioned; lack of a clear narrative. ▶ Each town is a very different proposition – don't always mesh together well – or work together well. ▶ Labour force issues – recruitment, skills, retention at all levels. ▶ Medium to longer term impact of Covid and Brexit on the viability of businesses.