TORBAY DEVELOPMENT AGENCY

TORBAY COUNCIL

Turning the Tide for Tourism in Torbay

Evidence Base
Strategy 2010 – 2015

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1. Industry Consultation Survey and SWOT

Over 300 representatives of the industry took part in the industry consultation process from March 1 to the middle of May 2009 via:

face to face meetings
telephone interviews
email communications
participation in official survey
attendance at strategy review presentations 23 March, 21 and 30 of April

The consultation questionnaire was mailed out to over 600 representatives of the tourism industry resulting in 235 replies and a robust sample. The questionnaire can be found at Annex 1.

Industry Consultation Survey SWOT

Feedback from the consultation process was analysed and findings presented and ranked in importance as follows:

Strengths	**Opportunities**
Natural beauty Unique horseshoe bay Mild climate Location of South Devon Clean beaches Waterfront accessibility Touring base for cities/countryside South Devon coastal path Variety of attractions Diversity on offer of the Bay areas Passion to succeed by tourism providers	Agatha Christie Geopark Water based activities Events/festivals Shopping All weather attractions Café culture Business/conference Walking Health/spa
Weaknesses	**Threats**
Access to and around the Bay area Poor traffic management Expensive and difficult parking Deteriorating environment Fragmentation of sector Lack of cohesive strategy and policy by Council No confidence in Council Poor standards, quality, product and service Anti-social behaviour, yob culture, lack of official enforcement in town centres by police and licensing No quality shopping experience Lack of direction and leadership	Imminent decline of Bay No policy, vision/strategy for tourism Lack of public/private partnerships Negative media Competition of other destinations UK and abroad Falling and failing standards Anti-social behaviour, yob culture Perception of stag and hen destination Public perception of the Bay Deteriorating environment Lack of focused marketing campaigns Lack of branding Infrastructure and traffic management Desperation felt by tourism providers

2. Maritime Leisure Consultation SWOT

Strengths	Opportunities
Clear waters, good depths, gentle, even currents, protected from winds Very little commercial traffic Excellent race officers Not too far from major conurbations – more accessible than Cornwall. Accessible beaches for launching, with nearby vehicular access. Two deep water harbours Two marinas and visitor berthing. Multi access dinghy launching facilities Torquay/Brixham facilities, shops/eating Well founded enthusiastic clubs Passionate private operators, keen to develop water sports Generally good cooperation between harbour authorities, clubs/operators	Integration of water activities into brand and centralisation of marketing activity Build on Torbay Week to create major national event/enhance perception as quality watersports venue Develop themed weeks for other water activities Develop youth facilities as a priority. Families will stay in area. Embrace parking/access requirements of watersports enthusiasts/operators Promotional links between water activity/accommodation providers Creation of high volume watersport centre in Paignton, Broad Sands and Goodrington as possibilities. Fast ferry link between Torquay and Brixham
Weaknesses	**Threats**
Poor linkage between maritime operators and traditional tourism sector Parking & launching infrastructure often unsupportive Car park height limiters make access difficult, attendants perceived as unfriendly and difficult Accommodation providers rarely get involved with water promotions Torquay dock over-subscribed/Brixham marina full Lack of quality food/drink harbour side Few operators currently operating	Inertia. The single greatest threat is to do nothing and see Torbay's water activity sector decline and the dependant industry lose a key USP. Further loss of facilities, to the detriment of local people and business. Unless the existing facilities are better supported with a supportive planning, transport and economic regime they are likely to decline or move to more supportive locations.

3. Business Tourism Consultation SWOT

Strengths Well established, well known destination Good conference centre with acknowledged excellent service and value for money RICC = largest conference centre in SW Some unusual venues for business events Towns have different personalities offers delegates variety and choice Association conferences High degree of repeat business Inspiring seaside location Compelling hinterland: Salcombe, Dartmouth, Dartmoor	**Opportunities** Absorption of business tourism into the English Riviera brand Coordinated destination sales effort Creation of one promotional platform New contacts with agencies Promotion of the unusual venues Host 2011 Global Geopark conference Development of natural science theme Attracting new corporate business combining water based activities Potential to develop corporate packages incorporating maritime leisure activities and casino
Weaknesses Insufficient Wi-Fi provision No single online business platform Insufficient modern 3 and 4 star hotels to cope with current levels of demand Not traditionally attracted corporate events Little evidence of national quality standards Torquay's reputation at night Business tourism not being taken seriously Weak local business base RICC and general hotel stock tired Difficulty of access from some areas of UK and abroad	**Threats** Loss of further major conferences Potential loss of the 1500 delegate conference facility at the RICC Continued recession, national drop off in business tourism Reduced rates Not coordinating promotion Not investing in increased Wi Fi provision Continued conflict between business room nights and leisure per person per night rates Increased competition from better established seaside conference destinations, namely Bournemouth Accessibility by road and rail

4. Easter Visitor Research

Introduction

This survey was commissioned as part of the Torbay Tourism Strategy consultancy project and managed by Deidre Makepeace.

Its key purpose was to:

- evaluate levels of customer satisfaction
- evaluate booking and information procedures
- gather opinions to help the future positioning of the resort

Methodology:

404 face to face surveys were conducted in selected locations across Torbay:

- Brixham centre and harbourside
- Paignton Promenade, pier and centre
- Torquay harbourside, centre and Princess Gardens
- Babbacombe Downs
- Paignton Zoo

The research team consisted of Diploma and Degree tourism students at South Devon College. Students were paid to undertake the face to face surveys over the period of 9 to 14 April (dates before, during and after the Easter bank holiday weekend).

An additional 165 surveys were completed on a self-fill basis at various accommodation centres including:

- Torquay Leisure Hotels, Imperial Hotel, Palace Hotel, Grand Hotel
- Beverly Holidays, Hoburne Torbay, Park Dean Holidays, South Bay Holiday Park

These were gathered over the period 8-20 April. The weather during the survey period was generally fine with only one day during the face to face surveys that had some light rain. The statistics were analysed using SPSS statistical software.

The Easter Visitor Survey Questionnaire can be found at Annex 2.

Survey Sample:

Data was gathered from staying visitors, residents and day visitors. Previous surveys had only included staying visitors (including visitors staying outside of the resort but day visiting the resort). It was felt important to widen the sample to include day visitors and residents. Day visitors contribute significantly to Torbay's tourism economy. Residents, particularly those making use of the resort's leisure and tourism facilities, are contributors to the wider visitor economy and are also significant stakeholders as the host community.

The sample breakdown for the Easter survey was as follows:

Staying visitors	305
Residents	156
Day visitors	112

Beyond this breakdown, the sample was random and included an appropriate spread of age groups, socio-demographic groups and lifestyles.

Length of stay

Of the staying visitors, 51% were staying for 1- 4 nights and 49% for 5 nights or more.

Type of accommodation

29% of respondents were staying in serviced accommodation, 57% in holiday parks and camp sites and 5% staying with friends and relatives. A high proportion of the self-fill questionnaires were completed at holiday parks and this is reflected in these results.

Of the respondents staying in serviced accommodation, 84% described their accommodation as 'hotel', 3% as 'guest accommodation' and 12% as 'B&B'

Accompanying

63% of staying visitors reported that they were on holiday with family. This is to be expected as the survey period fell wholly within the school holiday period. .

Spend

Respondents were asked to estimate their total holiday spend and this was computed to arrive at spend per person per night (excluding travel to the destination).

71% spend less than £40 per person per day (including accommodation, visits, and transport within the resort, eating and shopping). This figure may be expected to be influenced by the high proportion of holiday camp customers within the sample. However, in cross tabulating this data it becomes apparent that the spend figure is exactly the same for the self-fill and the face-to-face surveys. This highlights the fact that holiday park visitors have equivalent spend to all accommodation categories.

The average spend per person per day for domestic staying tourists in the SW region, excluding travel costs, can be computed as £39.59 (SWT 2007). With 71% in Torbay spending below the comparable level of £40, is it evident that Torbay continues to attract a low level of spend per staying visitor per night.

How did you gather information about your stay?

57% of staying visits referred to information gathered on previous visits. This is to be expected, given that previous surveys have revealed that 79% of visitors to Torbay are repeat visitors. The key finding from this question is the ever-increasing importance of the internet as a source of information:

- In 2005 it was used by 16% of staying visitors
- In 2007 it was used by 21% of staying visitors
- In the Easter survey 2009 it was used by 27% of staying visitors.

Nationally, 52% of all UK holidaymakers use the internet to source information for independent holidays (Mintel 2008). The lower figure of 27% would be expected with the high level of repeat visits.

How holiday was booked

- 31% booked their holiday online
- 40% by phone
- 28% by other means including post.

These figures compare favourably with the national average of 31%. The high percentage in the “other” category is explained by visitors taking advantage of Sun Newspaper special offers at the holiday parks.

What made you choose this area

Although an open question, responses were coded and showed that 51% referred to previous visits and 10% to visiting friends or family. It should be noted that those stating ‘visit friends and family’ may be staying in holiday accommodation.

Other key drivers are:

- weather
- easy access (manageable journey time from home)
- just love it (specific destination or Devon in general)
- just wanted to try it (for those that hadn’t been before)
- the general attraction of the area: scenery, beaches, coastline, attractions
- Sun £10 holidays and Tesco special offers also mentioned (where visitors are not always able to choose the destination)
- sporting events (hockey and rugby events mentioned)

The strong loyalty of some respondents was very clear with one reporting that he had come every year for the last 45 years.

Use of websites

- 26% of all respondents had visited this website englishriviera.co.uk.
- 82% of respondents that had seen the site stated that they had found it to be helpful and 7% had found it to be unhelpful.
- 29% stated that they had used other websites to find out more about the area.

Recollection of specific sites was limited and many simply stated that they ‘googled’ it.

The few websites names mentioned were:

Torquay.com
Various Devon websites (not accurately identified)
Visit Britain
Enjoy England
SW Tourism
Trip advisor/ holidays uncovered

The following websites were particularly used by residents:

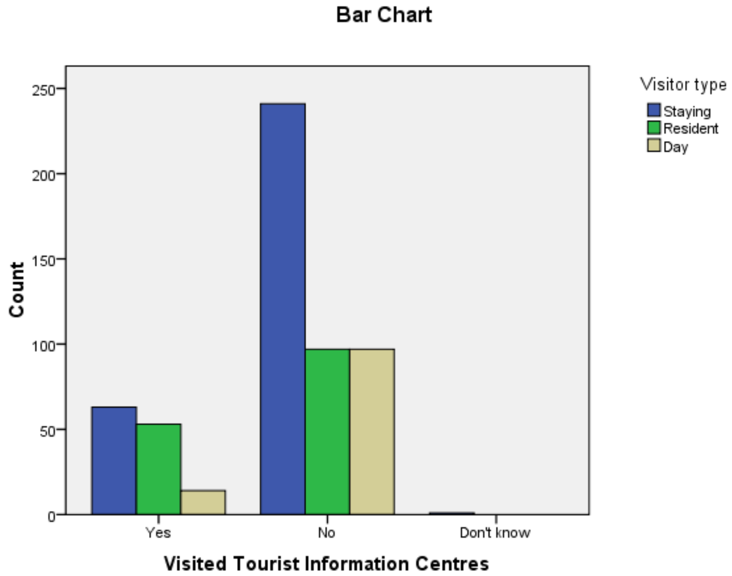
Torbay Council
thisissouthdevon.co.uk

Day visitors tend not to use websites, other than for the attraction they are visiting. However a proportion are aware of the various national tourism sites such as enjoyengland.com

Tourist Information Centres

23% of respondents had visited a tourist information centre.

This broke down as 21% of staying visitors, 13% day visitors and 35% residents.



What is it you particularly like about…

As an introduction to this section, it is apparent that residents and holiday makers alike have a strong tendency to show loyalty to the town that they are visiting or live in. Many will visit the other towns but the links between the location of the interviews and the positive comments about those towns was noticeably strong.

As is often the case – the resort is perceived differently by different visitor types and age groups so opposing comments such as quiet vs. noisy, or for families vs. for older people, sometimes appear. Some of the resort comments may relate to the facilities at accommodation (where the questionnaire was completed on a self-fill basis) and these have not been included in the analysis. Negative comments were not asked for in this section but some were mentioned anyway and recorded.

Particularly like about Torquay

The following being mentioned most frequently:

- shopping
- harbour
- seafront / promenade / cafes / terraces / parks
- cleanliness
- friendliness / holiday atmosphere
- lively/bustling/cosmopolitan
- weather/climate
- walks/coast/beaches

Negative comments included:

- too touristy
- busy / congested / overcrowded
- looking tired
- two respondents felt that crime or rowdy youths were a problem

Residents' comments are similar but they tend not to refer to either the friendliness or the cleanliness of the town. They are also particularly critical of the lack of shopping or lack of certain shops.

For day visitors, positive comments are similar to those of staying visitors; however the scarcity of comments or lack of knowledge of the resort is representative of the single purpose of their visit.

Particularly like about Paignton

- beaches, seafront
- family friendly, plenty to do
- little shops/independent shops
- traditional seaside/amusement arcades/good old-fashioned fun
- cherished memories
- quiet
- cleanliness
- flat – easy access
- zoo, steam railway, Quaywest and the cinema all featured as favourites. (The zoo came over particularly strongly but it should be remembered that this was one of the interview locations)

Negative comments included:

- bit of a dump
- shabby, rundown
- not what it used to be
- needs a bit of a facelift

Residents like the beach, arcades, green and cinema but are critical of the town's decline over the longer term. Torbay road and the quality of shops are seen as particularly poor.

For day visitors Paignton is recognised for its attraction, beaches and family-friendly atmosphere and facilities.

Particularly like about Brixham

harbour – a real working one with character
quaint / historic / colourful
fish / fish & chips / seafood
going fishing / boat trips
warm welcome

Negative comments:

neglected
smelly

Residents like the harbourside, cafes and Berry Head and although some state the town to be tatty or neglected they recognise the character of the town as a real positive.

Many day visitors from across the resort have not visited Brixham. For those that have it's all about the harbour and fish and chips.

Other areas/general

Top areas mentioned were:

Babbacombe
Cockington
specific beach areas such as Meadfoot, Goodrington, Broadsands,

Although by this stage of the questionnaire respondents had been advised that the survey concerned Torbay, many would refer to areas beyond Torbay and these comments were recorded. Respondents generally show poor awareness of the authority's boundaries. This section also highlighted the product strength that lies beyond the resort's boundaries.

Those mentioned frequently include:

Dartmouth / Kingswear
Dartmoor
Teignmouth / Dawlish
All of Devon

Residents didn't have many comments here but were more likely to mention areas that may be perceived as off the beaten tourist track such as Preston, Churston and Galmpton.

Day visitors had little to say here. They didn't refer to many specific areas but those mentioned were Babbacombe, Cockington and Berry Head. They also mentioned some that are further afield such as Dartmouth, Kingswear and Decoy at Newton Abbot. One stated "I don't think of it as a resort".

What do you call the resort?

This question was carefully worded to encourage all respondents to consider how they would describe the resort to others from outside of the area. 61% of all respondents said they would describe it by town name, 29% would describe it as Torbay and only 4% would describe is as the English Riviera. Breaking this down reveals that Torbay is predominantly used by residents. Both staying and day visitors are most inclined to refer to town names.

Residents are least likely to refer to the resort as the English Riviera. Only 6% of staying visitors and 4% of day visitors would refer to it as the English Riviera.

Awareness of the English Riviera brand

90% of day and staying visitors and 95% of residents are aware that the resort is known as the English Riviera. The resort has been branded as the English Riviera since 1983 with significant investment behind this brand. Whilst awareness of the brand is high, it is clear that visitors are very unlikely to use "English Riviera" as a geographical descriptor for their visit.

The culmination of the above two points suggests that the brand is extremely well recognised and therefore valuable. However, the way in which it is used needs to be carefully considered.

Favourite Spot

This was an open question that yielded a very wide range of responses. Some general observations:

- Many respondents would simply reply with a town name
- Respondents would tend to have a favourite spot near to where they are staying, for example Babbacombe for visitors in Torquay or Berry Head for visitors in Brixham.
- Many of the favourite spots mentioned are not in Torbay but beyond.

The top ten were:

1. Harbours and marinas
2. Seafronts
3. Babbacombe
4. Berryhead
5. Meadfoot
6. Broadsands
7. Goodrington
8. Gardens/promenades
9. Torquay and Paignton greens
10. Coastal walks and viewpoints

Virtually all residents were able to name one or more favourite spots and, although similar to those of staying visitors, residents seemed more likely to seek out spots away from the crowds such as Berry Head, Elberry, Roundham and Oldway. Some also mentioned a favourite café or shop.

Day visitors were more likely to name one of the towns here (perhaps because of a less comprehensive knowledge of specific areas). Attractions also featured highly for this group.

What is the one thing you love most about the English Riviera?

The responses for this question are hard to analyse, as visitors' experiences are very personal. Some respondents struggled to find something to say but others clearly feel a very strong emotional tie to the resort or to the feelings they have on holiday. Here are the key summary points:

- seaside – seeing it, breathing the air
- friendliness of the people
- being immersed in a holiday atmosphere
- weather and the warm climate
- beaches, landscapes, views, great scenery and coastal walks
- Englishness and a feeling of tradition/comfort/safety
- the quiet and the relaxation
- cleanliness of the area and of the waters
- gardens and palm trees

Some respondents love their holiday accommodation most, receiving good service and a warm welcome.

Places beyond the Bay that were frequently mentioned include:

- Totnes
- Dartmouth
- Dartmoor
- Shaldon, Dawlish, Teignmouth
- Little and rural towns and villages

Residents:

Scenery, people, harbours and beaches and the weather all appear here but residents are less emotive in their responses to this question. This is perhaps the mind set of the local; taking for granted what they have and struggling to think about what they really love about being here.

Day visitors:

Beaches, scenery, weather and the people all featured for day visitors but they also seem to appreciate the happy holiday atmosphere that they perhaps don't find in their home area.

The English Riviera in a Few Words

Here respondents were encouraged to think of adjectives and descriptions they would give the resort. The results are particularly telling and, although very wide ranging, were firstly analysed as positive, negative or neutral. Neutral would be used either if the respondent said e.g. I suppose it's OK, or if they give a mix of positive and negative descriptions.

81% gave positive descriptions, 9% negative and 10% neutral. Not too surprisingly the staying visitors are most likely to give positive descriptions (93%). These are customers that tend to be very loyal. What is surprising is that only 65% of residents felt that they could describe the resort in a positive way. The figure for day visitors is also disappointing and reflects the fact that some respondents are only in the area to visit one attraction.

Cross tabulating these results for the age shows very dramatically that under 25s are at least 4 times as likely as any of the other age groups to describe the resort in a negative way. This is critical as these are our customers and advocates of the future.
Assessing the words that respondents have used to describe the resort reveals some key selling points for the resort. Many respondents mentioned one thing but others gave long lists. This makes

statistical analysis difficult; however, below are some of the descriptions that featured most regularly from staying visitors:

1. picturesque / coast/ scenic / beautiful / stunning views
2. friendly / welcoming
3. relaxing / peaceful / quiet
4. warm / sunny / nice climate
5. clean
6. fun / enjoyable / lots to do / something for everyone / happy place
7. easy to get around / compact / lots within easy reach (within Torbay and beyond)
8. traditional / English / old-fashioned / character
9. child-friendly / safe

Negative comments from staying visitors would include crowded, congestion, that run-down feel, dull/boring (generally from younger respondents) and a bit "Fawlty Towers"

Residents were critical by comparison. Where they gave positive comments they are similar to those of staying visitors but give the impression of being truly heartfelt such as "great place to live" and "heaven on earth". Negatives included busy, run-down, boring, dull, tatty, dirty, overcrowded traffic and intimidating youths.

Day visitors positive comments mirror those of staying visitors but they seem to be relatively unconnected with the resort and are more likely to use bland terms such as, nice or nothing jumps out. Negative comments e.g. in need of a re-vamp, were indicative of those that visit an attraction then leave, felling no need to spend more time in the resort.

Planning to return?

91% of both staying visitors and day visitors are planning to return in the future.

What could be improved?

Not all respondents were able to suggest improvements that might encourage them to visit more often and a good proportion stated "nothing" or "happy the way it is". Many did however make suggestions and these are prioritised below:

- cheaper parking (mentioned by 7% of staying visitors)
- road access or road condition
- public transport improvements
- better facilities for specific groups including children, younger children and changing facilities for babies.
- more or better shops / more or better cafes and restaurants
- improvements to toilets or their opening times
- improvements to cleanliness or general maintenance,

Again residents were more critical and generally had lists of suggestions to make.

These include:

- cost of car parking
- more or better shops, bars or restaurants
- more toilets

- more for youngsters to do, activities such as kayak hire
- indoor facilities and repeated pleas for an indoor water park
- improve cleaning

Day visitors echoed many of the above comments but were more likely to refer to traffic congestion and parking fees.

Likelihood of recommending

84% of staying visitors would recommend a visit as compared to 74% of residents and 73% of day visitors.

Why wouldn't you recommend?

The vast majority did not answer this as they had stated that they would recommend. Those that wouldn't recommend stated their reasons as:

- hadn't enjoyed it
- too tatty, shabby or rundown (in some cases having noticed a deterioration over time)
- would recommend abroad
- not enough to do

5. Non Visitor Research (Nvs)

Introduction

Independent research partnership fionaandmichelle conducted four focus groups among non-and lapsed visitors. All groups were mixed gender and biased up market [BC1]. As might be expected for a seaside destination, two of the groups were among families and two were among 45-65's with no kids at home i.e. DINKS and empty nesters whom we know like to take off season breaks in the UK. The groups were held in Birmingham and Crowthorne on 23rd and 27th April 2009. The purpose of the research was gain a greater understanding of the reasons why the participants had never visited the English Riviera or returned for a long time.

This report details the findings and learning from these groups, drawing on other relevant research as appropriate, in particular the Brand Clusters project 2005/06 and the South West Non Visitor Study [NVS] conducted on behalf of SWT by fionaandmichelle earlier in 2009.

Executive Summary

This report is principally concerned with understanding perceptions of the English Riviera as gleaned from the focus groups and informed by other relevant research conducted for SWT.

Context

Influences and expectations driving holiday choice are a mix of the rational and the emotional and are broadly consistent across visitor type and life stage. VFR, overall cost, cost of accommodation, things to do, and sunshine are typically the top 5 factors with lively more important at younger end; history/culture at older end and cost of entertainment for families. The SW overall is a much visited, much liked holiday region, strongly associated with coastal, relaxing, peaceful, traditional and charming. Within the SW, Devon is the most visited area and people feel very warm towards it. It clearly attracts both the holiday and break market, though it would seem that the pros of the Riviera as a break option, particularly among up market consumers, are not widely known.

Seaside Resorts

As might be expected most people are familiar with a number of resorts around the country and most have ones they particularly like. The seaside is seen as a fundamentally different experience to a city and thus the two are rarely compared side by side as a break option. Perceptions of UK resorts are mixed with negatives tending to outnumber positives at a general, spontaneous level. In comparison, European resorts are well regarded with convivial atmosphere and attitude, especially towards children, being pros, alongside the obvious plus of the weather.

Digging deeper, however, it is clear that the word 'resort' is driving this negative image, as there are many seaside places that are held in high regard by the BC1 consumer. These tend to be smaller and are typically described as 'nicer' 'quaint'. Brixham was generally put in this group.

Paignton polarised: in Birmingham it was seen as down-market and 'full of holiday parks' and in Crowthorne as a smaller 'family' version of Torquay. In both locations, however, respondents were less clear as to where to place Torquay largely as they were not sure if it had been 'well kept' or allowed to fade.

The English Riviera

Both the name and logo were relatively well known, as were its location and geography. Torquay is most closely associated with the area and Brixham the least. Top of mind associations were largely positive, with imagery largely driven by palm trees, promenades and sea. In this respect, the implied ‘promise’ was seen to be attractive but risked over claim, generating a fair amount of scepticism. This was allayed to a degree by the images from the website which were thought to be ‘better than I expected’ and generally ‘appealing’ though inevitably some felt that this was simply marketing hype and that the reality would be ‘disappointing’. Despite this, the name English Riviera was strongly preferred to Tor Bay and whilst it was not thought to be one they would use themselves, most felt it could ‘work’ to promote/sell the area to a broad audience.

THE TOWNS:

Torquay

Was the most well-known and perceived to have a ‘classy’ past but an unclear present. Associations centered on big hotels, nice promenades and gardens, lovely beaches; on the flip side, there was a perception of its being full of old people and potentially tacky, faded and jaded. It may therefore be said to walk a fine line between sliding backwards or propelling itself forward - importantly the research suggests that it does have permission to be a nice, well kept, aspirational sort of place.

Brixham

Whilst far less known Brixham would seem to be well regarded and appealing to a BC1 market. Based on this research therefore, fionaandmichelle brand agency suggest that assuming it does deliver nice, quaint, well kept, and that there is choice in terms of accommodation and food and drink - it is not a priority for investment.

Paignton both polarises and lives in the shadow of Torquay. As such it is not as directly appealing to BC1 market. Lodges v caravans, beach huts and lovely beaches together with natural attractions e.g. zoo are potential strengths it could leverage. However it is probably fair to say that there is a far greater return to be had in prioritising Torquay for improvement in the short term than Paignton, not least as the former has greater scope to appeal to a broader target market.

Implications and considerations

In the research agency’s view there is scope to refresh and rejuvenate the Riviera brand and that both the name and the trees logo should be retained. The brand does however need to be clarified, as does the role of the towns in supporting it.

Executing and delivering this in a clear, consistent way will be crucial, as will be delivering consumer expectations in respect of a smart, well kept, attractive seaside place that people are delighted not disappointed by. Key to this is being mindful of the fact that whilst quality of accommodation, food & drink and things to do are important; the brand’s centre of gravity is the seaside and so the beaches/promenades /promenades/piers are the priority.

Context

This research focused on perceptions and associations - of seaside resorts in general and the English Riviera and its towns in particular; it is however, worth briefly detailing the key drivers affecting tourism at the moment and the relevant learning from other studies, as these not only form a wider, more robust context against which to interpret the specific findings from the groups, but also help clarify the general mindset and habits of the consumer, particularly in respect of visiting the South West, which may be helpful in drawing out implications and considerations going forward.

Economic context

- Overall economic downturn expected to continue with at least half the population feeling the pinch and most already modifying spending to some degree or another
- On the upside, however, the holiday culture is embedded in British psyche with holidays and breaks being seen by the vast majority as a need to have, not a nice to have
- In addition, most people claim that they do not want to compromise on quality when holidaying
- As such, it is anticipated that people will cut out the odd break and/or seek out offers that enhance perceived value, rather than cutting the quality of the trips they do take
- Headline figures for 2008 would seem to support this mindset with volume down 5%, whereas value only dropped 1%
- In terms of 2009, the UK appears to be benefiting from factors such as poor euro/dollar exchange rates, positive long range weather forecast and, potentially, 'Swine flu hysteria'.
- Certainly of those planning to take a trip over the Easter break, there was a significant shift in favour of the UK vs. abroad compared to the previous 2 years. As the Easter weather was good, UK trips were up v 08 - though official figures have yet to be released
- It would seem therefore, weather notwithstanding, that whilst people may have less cash per se to spend, they are prepared to spend a chunk of it on breaks/holidays, and in the UK (Source: VisitBritain)
- On the flip side, however, it is clear that in respect of trips away the value for money equation has changed over the last decade or so. It is no longer just about weighing up the cost relative to the quality and service/facilities provided; people are now factoring in the weather i.e. the more it is warm and sunny, the less a holiday/break will cost
- This was particularly evident in the recent Non Visitor Study we conducted online among a nationally representative sample of 2000 respondents, which revealed that the UK in general, and the SW in particular, were viewed as expensive v Europe - with cost of accommodation, food & drink and entertainment all contributing to this perception.
- Whilst research suggests that this is not a barrier per se for visitors, it is a potential barrier for both non-and lapsed visitors who are most likely to perceive the SW as expensive.
- This seems especially pertinent to this brief given the overall aim of increasing visitor value - a tough enough task in a bull market, let alone at a time when consumers are re evaluating value
- Central to meeting this challenge therefore will be understanding what consumers expect and want in terms of quality, service etc and then delivering it in a way that justifies the price - even if it rains. Importantly the benchmark here is not other UK destinations but rather the holiday experience that they have come to enjoy through years of overseas travel.

Expectations

The upward shift in consumer expectations over the last 10 years or so - particularly in respect of quality, service and facilities - is well documented, as are the implications for tourism, most notably the need to deliver a quality product in respect of food & drink [fresh, local] and beaches [clean, safe] as well as accommodation [attractive, comfortable]. We are aware that improving standards in these key areas has been at the core of the SW's overall strategy for tourism in the last 5+ years, and thus it is worth noting that in both the Visitor and the Non Visitor Studies the SW was seen to perform well/have improved on many of these key factors, and that this is seemingly in line with perceived improvements across the UK in general.

Indeed from both this study and other qualitative work undertaken by fionaandmichelle including the Riviera groups, it would seem that by and large consumer expectation in respect of the basics - accommodation, attractions, beaches and to a lesser degree, food and drink - is that it WILL be of a relatively good standard, so much so in fact that it could be argued that aspects of these are now hygiene factors e.g. en suite rooms. As such, if a place does not meet - or is not perceived to meet - this standard, it is simply not [re] considered.

This is particularly the case where people are comparing against Europe not just the UK, as the former is generally perceived to offer better quality and service, and to be inherently child friendly and flexible, as well as warmer.

Thus, with most people now having access to the internet, the modern traveller not only has more choice but also the means of exploring his options more quickly and more easily, and thus can match his needs more precisely; the upshot of which is that in terms of both attitude and behaviour people are not only able to be ever more demanding but also more discerning.

Importantly, however, the nature of what people are demanding is feasible for most, if not all, businesses to deliver - typically the vast majority are looking for good quality v luxury; decent, fresh food v gourmet etc. The detail of this and the implications for the Riviera is explored later in this report, but is referenced as appropriate throughout.

…nice place with an en suite room; comfortable, clean, accessible…
…. lodges look nicer than caravans and people are prepared to pay more for quality now

Influences

It is known from various pieces of research, including the Brand Clusters project of 2005/2006 that in terms of a trip in the UK, the key influences driving choice very much reflect these expectations: attractive location, clean, comfortable accommodation and lots to see/do being the most important factors across most if not all life stages.

The NVS largely supports this, but here the relative influence of the economic and European contexts can also be seen with both cost and sunshine featuring in the top 10.

Whilst the ranking in the list shown here is based on the average overall order across the sample, the top 10 influences driving choice were highly consistent, with only a few variations e.g. ‘easy to get around’ featured in top 10 for Non Visitors, and ‘culturally interesting’ featured for Lapsed visitors.

Interesting to note is that only two of the factors explored in the NVS influenced less than 10% of respondents. Although this is largely attributable to the broad competitive context i.e. trips abroad as well as in the UK, it does suggest that none can be discounted out of hand.

1. visiting friends & relatives
2. overall cost
3. lots of things to see/do
4. chance of a bit of sunshine
5. cost of accommodation
6. like to go to new places
7. interesting towns/villages
8. good local food & drink
9. cost of travel
10. easy to book on-line
11. quiet & peaceful
12. historic sites to visit
13. easy to get around
14. culturally interesting
15. easy to get to
16. quality of natural environment
17. good choice of quality accomm
18. easy to drive to
19. experience different cultures
20. found a good deal on accomm

Also of interest is the fact that the top 10 are a mix of emotional as well as practical considerations including distance, and are arguably unchanged v a decade ago, with booking online the notable exception.

The NVS also looked at variations by life stage. The differences are pretty much as we might expect and highlight the importance of life stage in driving choice.

South West - Overview

The profile and image of the SW are relatively well documented, as are perceived strengths and weaknesses. Less well reported however is the profile across the visitor, life stage and regional spectrums and strengths/weaknesses in the context of Europe, which despite the current exchange rate, we know is a key competitor. The NVS helps plug these gaps and we can draw on it to add contextual depth for both the region overall and Devon specifically.

SW Visitor profile [based on a nationally representative sample of 2000 respondents]

Almost 9 in10 [86.7%] respondents had ever visited the SW, with nearly ¾ [73.8%] having visited in the last 10 years.

Learning re barriers to visiting SW overall

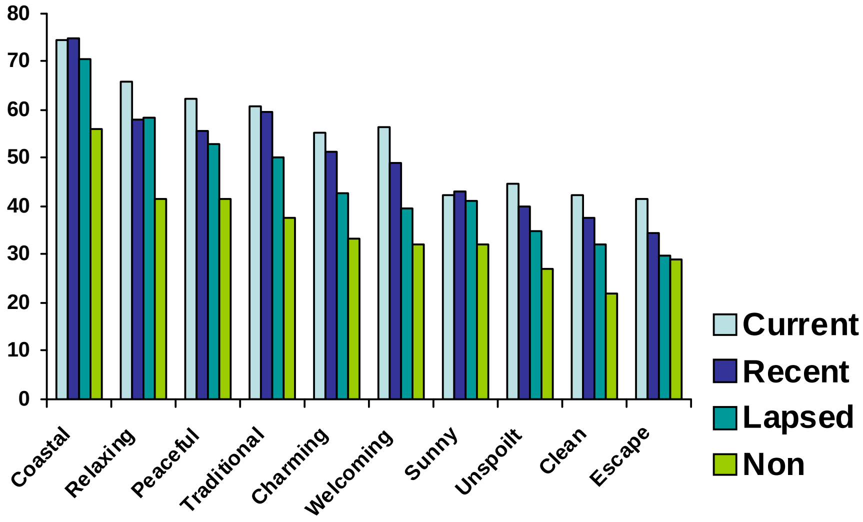
Non visitors skewed younger but not necessarily a barrier as do not reject UK or SW per se and so are potential visitors in the future, not least as are of a generation that travels a lot
Lapsed visitors bias older and from ‘far’ regions and thus behaviour likely to be entrenched
Proximity clearly a factor, but is a preparedness to travel if ‘promise’ justifies distance/effort
South East a key source of business but have wide choice and so potentially less loyal
Holiday profiles help clarify importance of life stage in choice of where to go with 25-44 no kids potentially the most difficult target to attract in terms of holidays; in terms of breaks, the younger groups are being tempted abroad more than other groups BUT also take more breaks in the UK
Targeting for off season hols/breaks therefore makes sense: SINKS/DINKS/empty nesters

South West Overview

The top 10 associations were consistent across all visitor groups. The image is a positive one with coastal dominating, and there is a strong sense of calm depicted via the linked attributes of relaxing, peaceful and escape.

Unsurprisingly, traditional is strongly associated, but is generally seen in a positive light; charming is also in the top ten.

Welcoming and sunny bring a warmth to the image. Importantly, unspoilt and clean are also featuring.



Always seems to be a bit warmer down there … a warm, relaxing place
25-44. F. Bristol. Never

Across life stage there was again a great deal of consistency in terms of the top 10.

Unsurprisingly, Retirees and Empty Nesters tend to have the strongest image, although those with kids are not far behind and relatively speaking associate welcoming and clean. Those with kids 12+ most likely to mention escape, linking to taking more breaks at this stage.

From the NVS qualitative interviews, we know there is some awareness at the younger end of pockets of the SW being cool/trendy, especially in Cornwall. 12.7% of those with young kids acknowledge this, with those under 44 no kids also registering this above 10% level.

On the negative side, whilst 'tacky' and 'commercialised' are no longer issues [less than 5%], almost a quarter of respondents perceive the SW to be 'expensive'. This is significantly higher amongst Lapsed visitors, and is top ten for Lapsed and Non-visitors suggesting it is a potential barrier to visiting for both these group.

Devon Overview

Devon is the most visited area in the SW: it has both fewest non-visitors and the most current visitors. Cornwall unsurprisingly is not far behind: CVs 21.3% NVs 36.3

More respondents from family life stages had visited Devon in last 3 years than had visited any other area: 28.6% of young families and 27.7% older families; again Cornwall also appeals to these groups 24.1% and 22.2%

Although more 18-24s visited Cornwall [22.6%] and Bristol [23.9%] v Devon 16.1% in last 3 years, more 25-44s visited Devon [22.5%] than any other area e.g. Cornwall 18.2% & Bristol 16.6%. Though not broken out in the data, we envisage that these are mostly breaks

Respondents feel particularly warm towards Devon, though again Cornwall not far behind: 7.35 v 7.31, with resp'ds from EMids, SE and especially SW [8.07 v Cornwall 7.86] most favourable. Retirees are however slightly more positive than families with 18-24s the least positive [as we found with SW as a whole}

Various qualitative research studies over the years [including the non visitor project done in 2005] support the fact that Devon, first and foremost, is seen as a great place for family holidays and for peaceful weekend breaks, both in terms of associations - traditional, quaint, ice creams, beaches, cream teas - and mood/atmosphere - quiet, restful, very English, not vibrant, energetic or trendy.

This perception [and reality?] is obviously a strength in respect of the summer months and the holiday market when occupancy is generally good. Similarly from the visitor profile we can see that Devon is a key destination for break target markets - certainly more SINKS/DINKS, Retirees and Empty Nesters have visited Devon v other areas in last 3 years.

It may be however that the association with beach summer holidays is a potential weakness for off season breaks by the seaside**,** even in the better weather months, particularly given that - as shown the next section - perceptions of the Riviera, are not well defined. As such fionaandmichelle brand agency feel that leveraging the inherent potential in this destination brand together with developing interesting, and relevant experience-driven solutions would seem to offer some mileage as a means of broadening image and thus appeal of both Devon in general and the Riviera in particular.

Key learning from the Focus Groups

Seaside Resorts

As might be expected respondents were familiar with British seaside resorts, though top of mind associations clearly show that, first and foremost, the phrase 'resort' evokes thoughts and images of the larger, established, traditional places, and as such there negative as well as positive associations.

they've got some lovely beaches

can't beat it if you get the weather

beaches	rain
promenades	amusement arcades
piers	fish and chip shops
lovely views	litter
buckets & spades	candy floss
	time warp
	busy
	over commercialised

a touch old fashioned.. become a bit run down

just looks tacky and that's not being snobby, they need to move on

Ease of getting around - or not - was referenced in several groups and would appear to be more of an issue than distance per se. This is partly driven by the fact that for many, a trip to the beach/seaside is a weekend or short break v a holiday option and thus they only ever go when it's sunny and so busy! Whilst this is a bit of a catch 22, it does confirm that there is opportunity within the breaks market but, as it is both last minute and weather dependent, marketing effort may be required in order to get breakers to visit outside weekend crowds.

Similarly, nothing to do on a wet day was a concern for some, especially in the family groups. Whilst this is obviously linked to awareness, it is worth noting that it immediately prompts negative associations and thus is a potential barrier.

what is there to do at a seaside resort on a rainy day, other than arcades?!

Importantly however whilst inclusive Hotels and Holiday Parks are a solution to this issue for some, we know that [apart from Center Parcs] these are less appealing to the more up market consumer who tends to prefer self catering/independent hotels/B&Bs and thus requires reassurance that there *are* wet weather options near by. Interestingly this was one of the few aspects that respondents in the non-visitor survey were not sure HAD improved.

Reassuringly, respondents quickly move on to describe the seaside places they do like and do visit, suggesting that for most if not all, the seaside is not associated with resorts per se but with specific beaches and/or areas; indeed everyone has somewhere on the coast they like. Within this it would seem that smaller, less well-known and/or less commercialised places are not thought of as resorts and this may be partly why they are more attractive to the up market consumer.

seaside hotels always seem to need refurbishment .. go to same chain in a city and its different but always the same

As has been seen in other research, nostalgia is definitely there, even among younger respondents, with frequent references to going to places "years ago" and "when I was a child".
It is also definitely rose-tinted particularly in respect of the weather
and whilst respondents admitted that it probably wasn't as nice as they remembered,

There was a sense that it was, however, somehow, just "not as good as it used to be" - which reinforces impression that many are tired and jaded.

Seaside Vs City Breaks

Respondents were highly consistent in their views of the pros and cons of a city v a seaside break and these strongly echoed previous learning in this area. Essentially they are two fundamentally different experiences and, as such, can appeal to the same person but at different times. Thus whilst cities are undoubtedly a competitor within the breaks market, it is unlikely that the two are often, if ever, compared side by side - the motivations and expectations being so different.

Wouldn't imagine you'd want to go to a city after a week's work but it's a great experience

Cities	Seaside
For excitement/buzz	For relaxation
History and/or culture - based around sight seeing	Beach and/or activities - based around the outdoors
Racing around, constantly on the go	Wandering/browsing, sitting watching the world go by
Night life	Gentle life
All on the doorstep - walk	All close by - some driving
Intense	Gentle

Go to chill really. A nice hotel, a few nice walks, nice pubs, good food [and stuff like that]

Within the above there are obviously some differences across life stages. Overall it was clear from these groups [and supported by the Brand Clusters work] that city breaks are less appealing to families per se, especially at the younger end. On the flip side, however, these groups do take breaks away without the children and are as likely [arguably more so?] to opt for a relaxing place with a bit of pampering, as they are the fun, frenetic pace of a city.

Some further observations - note: not discussed in detail in the groups

Whilst 'night life' is a key feature of city breaks, it means different things to different life stages: at the younger end it tends to be more focused on pubs, clubs and having a laugh; whereas older DINKs and empty nesters/retirees want good restaurants and safe streets they can wander around pre or post dinner. Importantly, across the life stages, Europe is generally seen to be a/the key competitor here, as the city experience is felt to be more atmospheric and amenable in Europe, especially in terms of options for the evening/night-time.

In contrast, the practical requirements are broadly similar regardless of location and in line with what we know people typically look for when going for a weekend/short break v holiday - nice hotel/B&B, good local food, easy to get to and easy to get around when there - the big difference being an expectation that on a city break you walk everywhere which is not necessarily the case in the countryside or at the beach.

Similarly, regardless of type of break, people generally want the option of things to do and whilst the nature of this may differ city v seaside, it is true for all life stages, even at the younger end, and even if it's on a stag/hen do.

People like to get a feel for a place they have made an effort to visit. This was emphasised in the NVS qualitative interviews among 18-24s, most of whom did lots of breaks, with frequent references to visiting 'things' whilst away with mates.

We choose attractive places, which have a bit of everything … including lots of cultural stuff - 18-24 Male. London

Finally, it is worth noting that the comparison confirmed the importance and relevance of short breaks in the UK and the fact that it is a discrete, experience driven market with a broad target. As such, there is no reason why the Riviera could not aspire to attract some of this business to help plug the off-season short fall.

Seaside Vs European Seaside Resorts

European resorts are generally well regarded by all and, as might be expected, prompt an immediate discussion re the weather - or rather the non reliability of the British weather; the underlying view in these groups and in the NVS, being that if the weather were more reliable, more people would choose to stay in UK as it is beautiful and if sunny would, de facto, represent better value. Interestingly however, in these groups, this was by no means the only big bugbear - almost all respondents, across all groups referenced the atmosphere and attitude in European resorts as being better than/preferable to the UK.

This was invariably described in terms of being more relaxed, more flexible and more welcoming, generally just more easy going

Unsurprisingly, being able to sit outside to have a drink or meal is a big pull - not least because it is something not often enjoyed at home and so feels special which reinforces pleasure of being away. The warmth of the evenings also allows for wandering around pre dinner which for most is a hugely enjoyable pursuit and highlights a further difference v UK - the relative indifference to tourists post beach and pre food, as little if anything other than pubs are open. This reinforces learning from the Brand Clusters work, which also bemoaned the UK's seeming resistance to evening browsing around shops, especially out of peak season. Interestingly, despite an acknowledgement that the UK was definitely more child friendly than it used to be, a view echoed in the NVS, the relaxed, welcoming attitude of Europe was nearly always linked to children, even among older life stages who felt that this meant they were less noticeable/troublesome v UK - mainly because it's seen to be part of European culture to include them and so the result is a more convivial ambience especially compared to the artifice of a UK themed pub or crèche. At a lower level, families also talked about the provision of facilities for children with the general perception being that here again, European resorts seemed to be more geared up for children e.g. "adventure playground right next to the beach"

Also referenced by some in each group was the sense that places were "somehow easier" to get to in Europe - a perception that there was less congestion, that it was less difficult to get in and out of beaches/resorts and that parking was easier.

British resorts are so un car friendly, they're so hard to get to; abroad its just easier somehow

Mapping British Seaside Resorts

Given top of mind associations, it is perhaps not surprising that the main split is traditional, larger resorts and nicer, quaint, usually smaller places. Importantly the former are definitely resorts, whereas the latter are not necessarily perceived as such.

Traditional, larger	Nicer, 'quaint'
more commercialised	typically smaller
traditional, old fashioned	traditional, charming
generally tackier	more 'up market'
more likely to be run down	well kept, smart
usually busier/rowdier	quieter
"seen better days"	"bit classier"

Thus, whilst the traditional, larger places were often first to come to mind - Blackpool, Margate, Great Yarmouth, and Clacton - this was driven by the fact that they were most readily associated with 'resorts'. However, as detailed above, it was clear in the discussion that these places were not generally well regarded nor currently visited by BC1 respondents, other than for occasional day trips.

In contrast the nicer, quaint places tended to be either where they were going themselves or places they had heard positive things about. Overall these were held in high regard, not least as they were perceived to be relatively unspoilt and/or to have retained their character. Importantly, there was also a feeling that they were not popular in the mass-market sense, and thus less compromised.

so tired looking … full of arcades … beaches lovely but town itself not what it used to be…so sad

In addition to these main groups, almost all respondents picked out Brighton and Newquay as being "for youngsters". Most were in agreement that Newquay was about the surfing scene and Brighton was about a vibrant night life, with an established gay scene; both were thought to be trendy, lively places, and there was quite a strong association with stag and hen parties especially for Newquay. Invariably, responses were mixed, even among same life stage e.g. families:

For some, the group was broader and thought of as 'Up & Coming' whereby they had changed or were changing and/or some form of regeneration was taking place. In this scenario, Weymouth, Bournemouth, Lowestoft and Eastbourne were included alongside Brighton and Newquay. However awareness of change for these latter resorts was far less widespread and if they hadn't heard anything, perceptions didn't change.

…I think they've had a face lift …haven't they got a new marina?

Similarly, the traditional, larger group was sometimes split to pull apart the 'not so tacky' resorts, ones that some respondents imagined had gone downhill, but less so than others.
And sometimes further still to include a 'Families' cluster, though this was only in Crowthorne family group.

Finally, the fishing villages were often noted within the 'nicer, quaint' group and were sometimes pulled apart on the basis that a harbour and "little streets running down to the shore" gave them a unique character. These places were also often associated with "nice restaurants" - although there was surprisingly little mention of good local seafood!

Detailed below is where the various resorts were placed within the overall mapping; however for robustness only those that were consistently viewed in more or less the same way across all the groups are included.

'Traditional, larger'	**'Nicer, quaint'**
Blackpool	Dartmouth
Margate	Sidmouth
Clacton	Lyme Regis
Great Yarmouth	Fowey
Minehead	Bude
WSM	Wells next the sea
Littlehampton	Brixham
	Cromer

Interestingly, although Brixham was the least well known of the three Riviera towns, it was quickly placed in the 'nicer, quaint' group.

It's fabulous, a lovely harbour, not overstated, wonderful

Busier and tackier than Torquay. Lots of camping and B&Bs

Paignton was known to most, but views differed by location - respondents in Birmingham saw it as down-market and "full of holiday parks", whereas those in Crowthorne had a less clear understanding and so lumped it together with Torquay as a smaller version "next door"

Perhaps surprisingly, although Torquay was well known to all, respondents were not entirely sure where to put it. It was generally agreed that it was large, but not that large and so they tended to waver between the two main groups.

This uncertainty was rooted in the fact that whilst people knew of it, both in its own right "used to be quite classy" and as the main town on the Riviera "the palm trees", they did not know what it was like now and so a question hung over it: was it still smart and well kept like some, or had it been allowed to fade like the others?

Whilst there was a preparedness to give it the benefit of the doubt, there was some scepticism too, as it was often perceived as old, and full of old people too.

Big hotels .. where the rich people went

A split personality - nice but also fish and chips

..coach loads of crumblies ..

In terms of mapping therefore, the position of Torquay was not conclusive. This obviously points to an awareness issue, but also suggests an opportunity, which we discuss in more detail in the last section on implications and considerations.

The English Riviera

In all groups the English Riviera name came up spontaneously during the discussion on seaside resorts or in the mapping; Torquay is most closely associated with the area, then Paignton and then Brixham. As already noted, in comparison to the others, Brixham was not widely known. Most respondents knew that all three towns were on the Riviera but only a few knew the precise geography and fewer still knew that they were around a bay. As a result, whilst Torbay was familiar to many when prompted, it was less familiar at a spontaneous level with some thinking it was the name of a resort v area.

Overall, most respondents were aware of both the name and logo, with the family group in Crowthorne least likely to be aware [though some were]. In the main, awareness seems to be from promotional material, e.g. in supplements [reference to seeing it on a Haven advert] or en route to/during a holiday in the South West.

Top of mind associations and imagery for the English Riviera were generally positive

“palm trees”
“slightly warmer”
“nice hotels”
“promenades, gardens and places to walk”
“nice, clean beaches”
“not as rowdy, loud or tatty as some [of the larger ones]”
“up market … boulevards, avenues of palm tress”
“I’d expect it to be sophisticated, very comfortable”
“[name] been around a long time where they used to go and promenade in Victorian times”

Though were several negatives and some scepticism

“Fawlty Towers”
“looks more glamorous than it probably is”
“unless they’ve got their own weather system, the name doesn’t ring true”
“coach parties”
“bit of a retirement place”
“You think 24 hour sunshine, and that’s a false impression really”
“golden sand, blue sky, palm trees - that’s just not this country”

Similarly, the logo was relatively well known, with the main one being both more familiar and preferred overall - “more to it” and more distinctive. Whilst not particularly liked, we know from experience that logos rarely perform well when scrutinised out of context like this; thus criticism here should not be taken literally, especially as most appreciated that it was a stylised interpretation of the promise and so, understandably, would be somewhat exaggerated.

At this point in the discussion, there was a feeling that the name and logo represented quite a big promise: sun, sea, sand … “just like abroad” and that this was hard to believe of a UK resort.

In comparison to ‘the English Riviera’, Tor Bay was less salient and less appealing overall

Some association with ‘nice sandy beaches’
Awareness of what Tor meant was very low
But if knew that Tor = Hill, name could suggest “a bit bleak, cold”
And if knew Tor = Rock, name worked against the more positive image of sandy beaches, though it did fit with parts of coastline and with knowledge/perceptions of Brixham.
Some suggestion that not particularly appealing sounding name

There were a few comments questioning the need for an umbrella brand, particularly as the towns were all felt to be different. Mostly however, this was not questioned but was accepted as logical given the geography i.e. all around same Bay in close proximity

Similarly, in one group the use of the name was queried with most feeling that they probably wouldn't use it themselves - they couldn't imagine saying "I'm going to the English Riviera" much more likely to be "I'm off to Torquay or wherever"
However, they could see that it would work well for companies operating across the area and on promotional material - the latter being where they felt that had most likely seen it themselves. They talked themselves round to thinking that overall it probably was a good idea after all!

Impact of images

Interestingly, and importantly, once people looked at the selection of images from the website some of the initial scepticism regarding the 'just like abroad' promise was assuaged with most respondents feeling that it was "appealing" "lovely" "better than expected" and that "the logo doesn't lie!"

Inevitably, some remained sceptical, feeling that it was just marketing hype/spin - partly because the sun was shining in every shot and partly because they were not convinced the images selected told the whole truth. Unsurprisingly some of the respondents who had visited in the past were particularly circumspect: "charity shops and pound shops [Paignton]" "Torquay high street is horrible"

For the vast majority however it was expected that a place - just like a product - would present and talk about its best features and so this approach was totally acceptable.

Whilst there was inevitably some variation across the groups, there was also much consistency, in particular in terms of

Images that were typical, what they expected;
Images that were surprising, more evocative/aspirational;
Images that were particularly dull/undifferentiating and
Images that they would associate with a particular town.

Not every image prompted a response and unsurprisingly the zoo and aquarium were mostly just referenced in the family groups.

Surprising/evocative

that looks gorgeous

looks idyllic, like abroad, could be Greece

Mostly surprising/evocative … associated with Riviera but also with Torquay

looks more glam than it probably is … but it does make you want to go and have a look

old, big hotels … big white buildings .. it all looks a lot more affluent [up market] than I thought it'd be

The Individual Towns - Torquay

As stated earlier, Torquay was generally perceived to have been classy in the past, but almost all were unsure as to whether it had sustained this and so was among the nice, well kept, smart places; or whether it had become run down and so was faded, a bit tacky and overly commercialised as per the traditional, larger resorts.

As respondents were all non-or lapsed visitors, associations were largely driven by perceptions, and some vague memories, and so reflect the uncertainty evident in the mapping:

Big white buildings and hotels - suggesting classy, sophisticated, "where the rich went"
But also …Fawlty towers - belying a concern that it may indeed be faded, with run down Victorian B&Bs etc
Large, but not big - reinforcing notion of 'grandness' from the past. Size in this respect matters as there was a definite aversion to resorts that were "too big", not least as generally viewed as busy and overly rowdy/noisy. As such there was an expectation that it would be quieter/calmer
Lovely beaches - referenced in all groups and obviously a key strength for all life stages
Families - for some but not all, driven by perceived abundance/attraction of sandy beaches
Old people - although not a strong association, there was frequent reference to age across the groups, both in terms of residents ["full of pensioners"] and visitors ["coach loads of crumblies"]
Probably not youngsters - sense that might be too quiet/boring for them [though was odd reference to stag/hen do' aka Newquay]

Perceptually therefore, Torquay may be said to be walking a fine line with the potential to either rapidly slide backwards into a tacky, faded, tired, dated "I don't know anyone who goes there any more" type of resort, or to be propelled forward into a nicer, well kept/smart, more aspirational type of place that people write and talk about and so others hear about and so on …

Quite up market, I would want to go and book up tomorrow but I think I might be disappointed

It's always been known as where the rich people went promenading … looks up market, nice looking places, the gardens, nice hotels

Torquay is not as up market as the impression you get from the name [Riviera]

The hotels look nice, the area and towns too, so I would want to check it out

Paignton

Seems to polarise - being seen as relatively down market and tacky in Birmingham v a smaller, more family orientated extension of Torquay in Crowthorne, with the zoo being the only shared positive association. This is largely driven by the perception that it is "full of holiday parks and caravans" and "smaller but busier than Torquay". It was clear that for many the whole idea of caravan holiday parks was unappealing; some did however defend them as having hugely improved to be "really quite nice and much better quality" but the majority felt quite strongly that whilst lodges were OK [e.g. Center Parcs] caravans were just not for them.

Undoubtedly, Paignton also suffers from being in Torquay's shadow, both geographically and perceptually - 'the smaller place, next door, with the zoo'. Perceptions beyond this were either hazy or negative.

It does not enjoy the same sense of 'past' as Torquay nor does it have the oldy worldly charm of Brixham. It does, to a degree, simply sprawl between the two.

In this respect there is a need first and foremost to clarify what makes it different to, or complement, Torquay.

Chalet type places, caravan parks, campsites and B&Bs

More family, beach huts - I do like them, very English & quite up market these days

Brixham

Also polarises in so far as people are either aware of it and have a very clear, positive image; or they are not and it's a complete blank. For those who have been in the past or are aware, it is very much associated with being a small, attractive fishing village/port with a lovely harbour and nice restaurants, and is therefore viewed as one of the nicer, smaller, 'quaint' places.

In this research, being small was considered to be a positive as it suggests unspoilt, less likely to be commercialised and quieter, so less likely to be crowded/busy. Similarly 'quaint' implies an oldy worldly character, which is appealing for the same reasons.

Whilst this would suggest Brixham has a clear platform on which to build, it is not so strongly linked to the Riviera as the other two, which may be an issue of geography as well as awareness/ perception - being, as it were, the place at the bottom/down there, and so sometimes linked to Dartmouth 'round the corner'. As such, whilst arguably it has the clearest personality/positioning and potentially the greatest appeal currently among a more up market target, it also may have the greatest need in terms of the 'halo' effect of a strong Riviera brand.

quaint but vibrant - full of young people, quite arty

it's a really lovely little fishing village

To summarise:

Whilst by no means a blank sheet of paper, it would seem from this research that perceptions had not yet tipped into the grossly negative, and thus the potential for a programme of regeneration to spearhead a rejuvenation of interest and appeal in the area would seem to be good

Importantly, however, the research suggests that in some respects 'refreshment' v 'regeneration' would be acceptable

- Nice and well kept in this context does not necessarily mean a deep excavation face lift, but rather some cosmetic engineering to reveal the beauty beneath!
- People do not expect or want places like this to change their inherent character - like a person, it is what makes them recognisable
- They do however expect and want them to take pride in and look after themselves - e.g. be clean, tidy, [freshly] painted, smart fascias along the high street
- And not too commercialised - inviting, interesting, individual shops to browse around, good local restaurants cafes and pubs serving fresh, local food v string of high street names you can get anywhere

Based on this research the English Riviera is definitely the stronger name and, on balance, It seems that there is more to be gained from sticking with both the name and the logo than there is by changing it. Both the name and logo have strengths to build on and no major negatives. The research agency's advice would be to opt for consistency, which is recognised as core to successful branding.

Strengths

- **Good awareness of name**
  already 'out there' - can be invested with [new] meaning
- **Lots of positive associations**
  potentially distinctive for UK - can be leveraged
- **Has heritage**
  generally thought to be an 'old' name; again a positive to leverage
- **Good logo recognition**
  relatively well known - good base on which to build
- **No gross negatives with logo design**
  communicates core promise - potentially distinctive

However, whilst the English Riviera is well known, suggestive of positive imagery and potentially distinctive as an umbrella brand for the area, the three towns it embraces have very different personalities, each based on inherent physical truths which are neither easy, nor sensible, to dismiss out of hand.

In moving forward therefore, there is a need for clarity and consistency and consideration needs to be given to the brand model that the area might adopt should it retain the Riviera brand as suggested.

By brand model, we mean a way of organising the brand so that it is embraced and clearly understood by all involved

- what it stands for/is about, including personality attributes and tone of voice e.g. currently all the associations come from 'Riviera' - is the brand simply 'the Riviera in England'? Or are there

'English' traits that could/should be taken on board and reflected in the way the brand presents itself, both in terms of product and communication?
who it's aimed at; its role, particularly in terms of communication
the position, role and attributes of the three towns
who they're aimed at in terms of psycho graphics not just demographics; their role etc

Expectations [of the English Riviera resort/s]

During the research discussions expectations were also briefly explored - what they imagined and/or would expect to be there, mainly in terms of things to do and accommodation. By and large the learning here is supported in other research, insofar as it confirms the link between expectations, anticipated experience and life stage.

As such, it is not surprising that expectations of the resorts are focused around the beaches; at least when thinking about The English Riviera, Torquay and Paignton

Beaches are the main attraction on this kind of break/holiday
Expect that they would be sandy

Although not probed here in detail, it is known from other research that cleanliness of beaches is also important, and safety, especially for younger families; and similarly that relevant activities/facilities would be available and easily accessible [e.g. not having to walk miles to get a drink/go to the loo!]

Some uncertainty as to whether there would be/was a beach at Brixham?

Attraction here is more around visiting a place with a specific point of interest - the harbour/fishing - watching/observing what's going on in an attractive environment
This is underscored by an expectation of its being relatively small with nice cafes, restaurants and/or pubs serving local food, pretty streets to wander around and a peaceful, calm, welcoming ambience.

Would also expect Torquay and Paignton to be attractive, pleasant places to wander around
a nice promenade and/or sea front, ideally with cafes
streets with shops, small galleries etc that are easy to walk to and enjoyable to browse
a choice of nice places to eat, ideally serving a variety of local food [seafood especially?]
and perhaps gardens or at least some green areas set back from the beach where can spend some time.

a nice promenade and lots of places to stop for a drink

Otherwise, seemed not to expect a great deal of the resorts themselves - though this should not be taken too literally as it is known that people find it hard to project in this sort of environment.

It is therefore probably worth cross-referencing this with the recent Visitor Survey as this may better be able to help identify if there are any expectations not currently being met or not being met to a high enough standard.

It would seem that in general people would expect [prefer?] a choice of other things to see/do nearby rather than loads crammed into the resort itself. This is in line with up market preference for less noisy/rowdy places per se, but may also be a way of managing a broader audience i.e. a funfair to the side or in a discrete part of town v slap bang in the middle would allow disinterested visitors to avoid v feeling it's centre stage. Here the issue of amusement arcades comes up with the consensus being that they are fine as far as it goes but would not expect or want them to dominate.

In terms of things to do nearby, the expectation here is largely life stage driven e.g.

Older visitors tend to be attracted by culture, history, gardens etc
Families want water parks, zoos etc
We also know that adventure type activities and, to a lesser degree, culture, especially arty stuff, are of interest at the younger end.

Interestingly, from both these groups and previous research, 'natural' attractions such as the UNESCO Geopark appear to have a much broader appeal. It is thus worth noting that there was NO spontaneous awareness of the Geopark in any of the groups.

a zoo and nice botanical gardens not fairground type attractions

Similarly there was no spontaneous mention of what would expect in terms of local facilities. At a prompted level, however, clear that do expect that there will be a leisure centre or at least a heated indoor swimming pool and a cinema. Importantly these seem to be thought of as basics/givens and so are probably hygiene factors v selling features per se. In the same vein it was expected that there would be attraction/s nearby for kids with most aware of the zoo and some aware of the water park.

Unsurprisingly, when it comes to accommodation the main expectation is that there would be a wide choice from which to select option that best suits needs and budget, particularly bearing in mind that this differs by type of break/holiday, from break to holiday and by life stage, with some older respondents remarking that they "self cater when away with family but prefer hotels if it's just the two of us".

Thus whilst most respondents expressed a preference for [smaller] independent hotels, B&Bs [with ensuite] or interesting/attractive pubs [again, with en suite] especially on breaks, all expected there would be a spread of styles across the area, including swish hotels at the top end and camping/ holiday parks at the bottom.

Again, there was a sense that this was a given, the norm for a sizeable resort, and that, importantly, lack of choice would therefore be an issue
.

we go for nicer places, nicer hotels - we can be more selective now we've not got kids

Whilst there are no real surprises here, it is interesting to note that although there was a general preference for independence regardless of style of accommodation, and also a preparedness to 'up grade' if travelling without kids, a number of respondents were also being swayed by offers/deals from 'quality' hotel chains.

The Hilton has very good offers - £10 a night , can't beat that

For some, deals/offers not only influence where go, but are in themselves a reason to go i.e. "deal too good to miss" compared to budget flights.

Importantly however, there is a distinction here between a deal on room price in a 'quality' chain, which is attractive to some BC1s, and an all-inclusive package which research suggests tends not to be appealing. This is largely driven by the fact that for this target, especially those without kids, eating out is a core part of the experience, particularly on a weekend or short break. It is also one they are happy to spend a little more on if the quality justifies it.

Finally, families tended to have quite a broad spectrum of accommodation options they would consider, depending on age of children and type and length of holiday/break.
However, there was a general preference for self-catering, either independent [house, cottage] or as part of a hotel, with proximity to the beach and flexibility important criteria at the younger end; activities, entertainment and places to eat being key at the older end.

Responses to the brochure

Could be anywhere, nothing shouts English Riviera

Nothing is hideous but nothing is really appealing either

Overall, the brochure was felt to be quite appealing but in general tended to confirm what they would expect/want

Great beaches
Plenty to do/see/visit
Mostly outdoors
Looks attractive, well kept, up market [for some]

Thus whilst some individual images were appealing across the groups e.g. night scenes and ship/ seafood at Brixham, and some were not e.g. Pier at Paignton, Guitar scene [p.9] - little surprised or impressed them spontaneously and nothing struck them as distinctive.

Upon prompting, however, the UNESCO Geopark was felt to be “special to the area”, even though most did not really understand what it was and were even a little misled by the initial spread in the brochure which is more suggestive of rock pools safe for little children, than it is a place of special geographical interest. That said a few in each group did highlight the ‘caves’ page as being of interest/appealing.

Notwithstanding the lack of ‘wow’ factor, most areas of interest were felt to be adequately covered by the brochure - some in too much detail, but at least clear what’s on offer. The exception to this was food/places to eat & drink - not felt to be nearly enough information/ideas. As noted earlier, food and drink, especially in the context of eating out [but also good delis/butchers/bakers etc] is a core part of a short break for all BC1 life stages - there is just something special about eating out whilst you’re away. Thus whilst cream teas are great, and very much associated with Devon - good quality, local fresh food is really important; in particular there is an expectation of good sea food, it being so close to the sea!

Finally, as already alluded to, the brochure was felt to contain too much information by most, if not all, respondents. Here we can see the influence and importance of the Internet with this unanimously the favoured option for research and, increasingly, booking, across all life stages. Not only is it considered easier, but also the nature of the medium means people do not feel bombarded or overwhelmed by information, but in control of it.

The preference for online is evidenced in several research studies, including the NVS. Its role as a primary research tool has long been widely accepted - indeed Mintel conducted a survey in Jan 08 for money portal fool.co.uk which showed that people spend more time researching and planning their holiday than they do their mortgage! The survey concluded: “holidays have become a high engagement purchase and increasingly the research and booking stages are as much a part of the experience as the holiday ... online operators are [now] turning their attention towards creating more compelling and engaging content …”

A brief note on the Booking Process

Although booking online is a more recent ‘mass market’ activity, some studies estimate that it now outstrips the phone for booking, even for domestic trips. Certainly the 2006/07 Mintel report on the holiday booking process suggested this was likely to be the case and, as importantly, emphasised that it would not necessarily be the youth market driving it.

According to Hitwise, the silver surfers [55+] are set to be the largest demographic group online even overtaking 35-44 year olds. They accounted for 22% of UK visits on the web [all categories] in 2007, with their preferred categories being travel, news and media sites; 27% of all visits to travel sites were from those 55+.

Whilst this group obviously have the time to research more extensively, it should also be remembered that they also have the time and the spending power to travel and are particularly fond of UK holidays and breaks. This, together with the fact that they are a large demographic group who will become increasingly younger attitudinally as the next generation falls into this age band, means that they are an important target to bear in mind when developing both marketing material and, in particular, booking systems - not least as they are typically the one group not consulted!

A few observations on the website

In the online environment potential visitors are only ever a click away from a competitor. Websites therefore have to work from the first point of contact as people tend not to flick through as they might a brochure

The ER home page, and the site in general is much like the brochure ‘neither hugely appealing nor really hideous’

Implications and considerations

As already mentioned, overall the picture among BC1 non-and lapsed visitors is not as negative as might have been expected. Although only 4 groups, views were highly consistent and thus may be considered robust, particularly as the NVS also shows that non visitors tend to have a weaker image vs. visitors, but not necessarily a negative one.

The agency's view is that the core issue seems to be less that image/perceptions are poor per se, and more that they have no clear understanding as to what the area offers these days, have not heard much/anything about it [good or bad] and thus have no reason to put it on the consideration list.

In addition, both the Midlands and the M4 corridor are well placed in terms of nice places to go and the Riviera is a relatively long journey, especially for a short break and is definitely too far for a weekend [3 to 3.5 hours from both locations according to respondents and verified by Google!] - as such, people need a really compelling reason and/or a strong recommendation to visit, not just a bunch of hazy images.

Undoubtedly perceptions and image are weak but as stated earlier there are definitely elements that are potentially distinctive, not least of which is a sense of heritage, which we know from our experience of working in branding is a huge strength - particularly here where it can help to counter any notion that the Riviera is a recent marketing 'invention'.

The main implications from this research are

Clarify the brand: which name, which logo, what values, what personality, what promise, what relationship with individual towns etc; leverage truths, rather than invent; it's probably ok to go for a future facing positioning [provided regeneration programme will deliver] but tonally may need to be understated v brash - both to be credible and to attract BC1s

Execute it well: develop marcoms that reflect core values, capture personality etc in a fresh, exciting but not necessarily super-modern way; need to beware that execution doesn't overwhelm substance or undermine heritage - it is an old established resort that's propelling itself into the 21st century, not a new kid on the block; prioritise the website

Ensure experience reflects brand promise as closely as possible at all stages: whilst obviously it will take time to implement and then broadcast major product changes/upgrades/ new developments, it is worth exploring what can be done to deliver ‘smart, well kept, attractive’ to the highest possible standard in the short to medium term, not least as people are a lot more forgiving if they feel you’re trying!

Take pride in it: get all stakeholders on board and get them talking up the positives on your behalf; consider engaging residents as well as businesses in the process; enlist some as brand ambassadors

Stick to it: demand consistency - demonstrate its efficiency/economic value, have a set of guidelines drawn up so everyone is singing from the same hymn sheet … all the time; be patient, brand rejuvenation is not an overnight job

Shout about it: awareness is an issue and promotion can arrest image uncertainty; promote the refreshed brand; be as visible as budget allows; consider sponsorship and PR v advertising; and the relative merits of getting on board a celebrity ambassador cf Rick Stein

Monitor and review: it will be important to consult visitors/ non visitors on a regular basis to identify where improving/where not, both in terms of image and product; could possibly use recent VS as a benchmark though would suggest a bespoke study/ questionnaire may be more helpful as can then include the agreed values, personality traits etc as these are what you will be wanting to measure and monitor and, if well designed, would allow you to identify the impact of specific changes e.g. opening of a Jamie restaurant and/or several months of consistently good PR [or just one if in the ‘right’ media!]

Here follows a number of considerations emerging from the research that may merit further consideration in the up coming strategic overhaul. The table overleaf aims to summarise expectation, and includes points made earlier in the report:

Expectation	**Appearance**	**Accommodation**	**Food & Drink**	**Things to do**
	Attractive, appealing	Attractive, comfortable	Good quality, local	Beach + options nearby
Meeting expectation	Clean & tidy - no litter streets/beach - pavements swept - immaculate piers & promenades - neatly kept palms,	Clean, thought about - décor in good order - neutral, no clutter, simple furnishings - en suite - efficient shower/bath	Attractive, clean environment Efficient, friendly staff Prompt accurate service	Clean, safe, sandy beaches - blue flag Good basic facilities - toilets - café, kiosk, shop

	flowers & gardens - buildings, shops, cafes etc to look well kept - not falling down - keep arcades as recessive as possible	- efficient, flexible heating system - good quality linen - provision of basics e.g. tea/coffee/water/TV	Fresh/local v frozen /foreign produce Simple menu Well chosen, well cooked food	- water activities [but away from swimming] Choice things to do e.g. - history & culture - walking, cycling etc - shops to browse - attractions for kid
Excelling	No evidence at all of 'jade or faded' e.g. - no crumbling paint - no boarded up or unsigh shops, cafes or buildings - no noisy arcades!	Spacious rooms & Little touches - fruit/DVD etc in room - top quality linen - flexible meal times - newspapers etc	High/top quality - individual style/flair - original menu - only fresh/local NB not necessarily gourmet cf Jamie	Smart, big toilets Shower facilities Hire of towels etc Good/fresh food in café Transport to/from places Attractive shops
What it should feel like	Fresh, bright and inviting Cared for A delight to wander aroun "invested in" "smart, well kept"	A pleasure to be in Cared for "fresh and up to date" "look after their guests"	Inviting, pleasant place to be Convivial ambience "relaxed" "clearly good quality"	Enjoyable Easy Exciting
What it should NOT feel like	"seen better days"	"stuck in a time warp" unwelcoming	Sloppy, thrown together	Boring

Whilst by no means exhaustive, the above is hopefully indicative of the direction and the focus businesses need to adopt to optimise appeal among BC1 target.

Further detail can be found in the Brand Cluster reports, in particular how the above might apply to specific businesses and accommodation providers.

A word on Attitude

The research clearly highlights a need to be cognisant of the importance of attitude, a learning that is supported in other research, especially in the context of Europe.

This feels particularly pertinent to the Riviera as its imagery and physical reality is the closet that Britain has to the med and thus excelling in attitude to exude a welcoming, laid back, child friendly ambience that supports this would seem to be appropriate, and potentially distinctive. It is also worth noting that 'laid back' is a characteristic that is appealing across the life stage spectrum and especially among under 45s with no kids.

As such consideration should be given to investing in a major recruitment and/or training drive, with the aim being to find naturally enthusiastic and friendly people and to train them well - and to employ at least some of them throughout the year not just in high season, as a poor attitude and ambience is more noticeable and less forgivable out of season.

It is also worth noting that the 'right' staff can potentially help drive image i.e. youngish, friendly, efficient people in high visibility cafes, hotels, shops, attractions may help dispel perception of 'older' 'pensioners'. Thus, at the risk of discriminating/sounding ageist, focusing recruitment/training on the twenty something [Y-ers] market may also merit consideration.

A note on the Breaks market

The research agency feel that given the competitiveness of this market, it is probably most sensible to benchmark the brand/product v other coastal towns, both in Europe and the UK, rather than vs. cities, as this better reflects consumer mindset and behaviour i.e. as detailed up front, consumers typically take an experience driven approach when researching break options i.e. they tend to be pretty specific about the experience they want and the criteria this entails - particularly in terms of city/culture; seaside/relaxation - and to then recce a shortlist of places before making their final decision.

Thus, stag/hen parties notwithstanding, the decision re environment [city v not city] tends to be made by most before searching for options; it therefore strikes us as highly unlikely that the Riviera towns would be considered alongside a city alternative.

Turning this around, there is obviously opportunity to more overtly market the area as a breaks option but we would suggest that this is approached mindful of the experience mindset as detailed in the R&R Brand Clusters work [e.g. romantic, ideas/inspirations, adventure, ‘just for the fun of it’] many of which appeal to the under 45s as well as the lucrative older groups.

Battery of factors used in NVS to understand relative importance as influencers on holiday/break choice

Easy to get to from home Easy to drive to Easy to get around when there Visiting friends and/or family Easy to find info about it on-line Easy to book on-line Heard/read about it in the press Recommendations from friends/family Found a good deal on accommodation	Good choice of quality accommodation Good choice of quality places to eat & drink Good shopping Good local food & drink Quality of the natural environment Lots of things to do and see Historic sites to visit Culturally interesting

Found a good deal on travel Saw a good deal advertised Saw cheap flights advertised Overall cost Cost of accommodation Cost of food and drink Cost of entertainment/attractions Cost of travel The chance of a bit of sunshine	Interesting towns & villages Specific sight/attraction wanted to see Specific event/festival wanted to go to Quiet and peaceful Lively, with a buzz Like to go to familiar places Like to go to new places haven't been before Like to experience different cultures Am a city person Perceived as welcoming and friendly Expected high service standards Flexible about meal-times/hours you keep

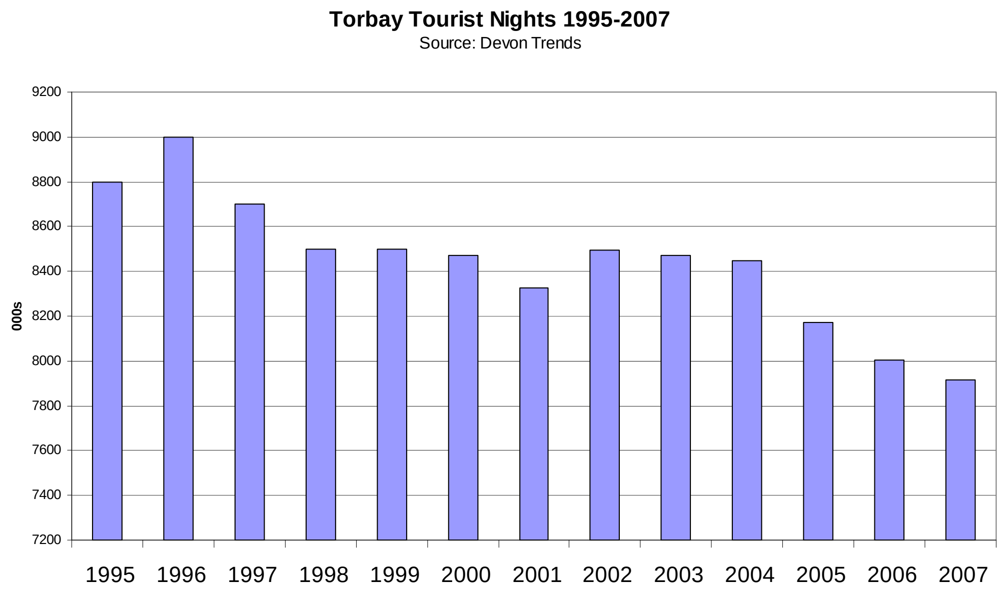
Battery of words/phrases used in NVS to identify core associations

Peaceful	Tired	Unspoilt
Relaxing	Forward-thinking	Commercialised
Energising	Up-to-date	Polluted
Uplifting	Imaginative	Clean
Fun	Spirited	Eco-friendly
Vibrant	Stuck in its ways	Fresh air
Exotic	Dated	Young children
Exciting	Conservative	Retirees
Escape	Free-thinking	Teenagers
Crowded	Welcoming	Surfers
Boring	Stand-offish	Outdoor types
Dreary	Charming	For everyone
Slow	Distinctive	Hippies
Tame	Diverse	Sunny
Expensive	Quirky	Wet
Tacky	Cool/trendy	Windy

6. THE ENGLISH RIVIERA – TOURISM TRENDS AND STATISTICS

Torbay's long term trend

From a peak of 12.7 million tourist nights in the 1970s, Torbay has had a gradually decline with only a few years showing growth. The decline has slowly continued during the last decade and more dramatically since 2004.



Volume of Tourism

Tourism volume is measured by tourist trips and tourist nights. The trips/nights ratio is important as this is one measure of the value being achieved per customer. Torbay traditionally has been successful in attracting longer stay visitors. This is, however, a double-edged sword; the longer stay visitors can have a marginally lower value and longer stays can be indicative of a failure to attract the growing, affluent short break market.
With a reduced average duration of 4 nights being recorded for 2007 the English Riviera maybe starting to attract an increased share of the latter.

Torbay and Devon Districts

Torbay and Exeter are the only Devon districts showing a decline in tourist nights for the period 2001-2007. Notable for showing growth are Mid Devon, Torridge and West Devon.

These are all districts that represent a more rural holiday experience. This trend is supported by national research showing that the domestic holiday maker has increasingly moved inland (Mintel 2008).

Torbay and the UK

The UK Tourism Survey is the national benchmark and UKTS is one of a number of national surveys that feed into the SW Value of Tourism model. SWVOT shows a much more dramatic decline in tourist nights for Torbay.

Torbay and England Tourist nights 2005-2007:

Torbay 22% decline
England 7.0% decline

Torbay and other resorts

Torbay is the largest resort area in the SW region. Although none is thriving, Torbay is showing a disproportionate decline. The percentage decline for each resort from 2005 to 2007 is shown in table 3:

Bournemouth	TBC
Restormel (inc. Newquay)	-4.6%
Torbay	-21.8%
Weymouth & Portland	-9.8%

English Riviera Volume and Value

The volume of tourist nights has been in decline in Torbay over an extended period of three decades. This is partly representative of a decline in UK resorts and a general decline for domestic tourism. However, the level of the decline for Torbay is more dramatic than for other districts in Devon and other resort areas in the SW.

Value of Tourism

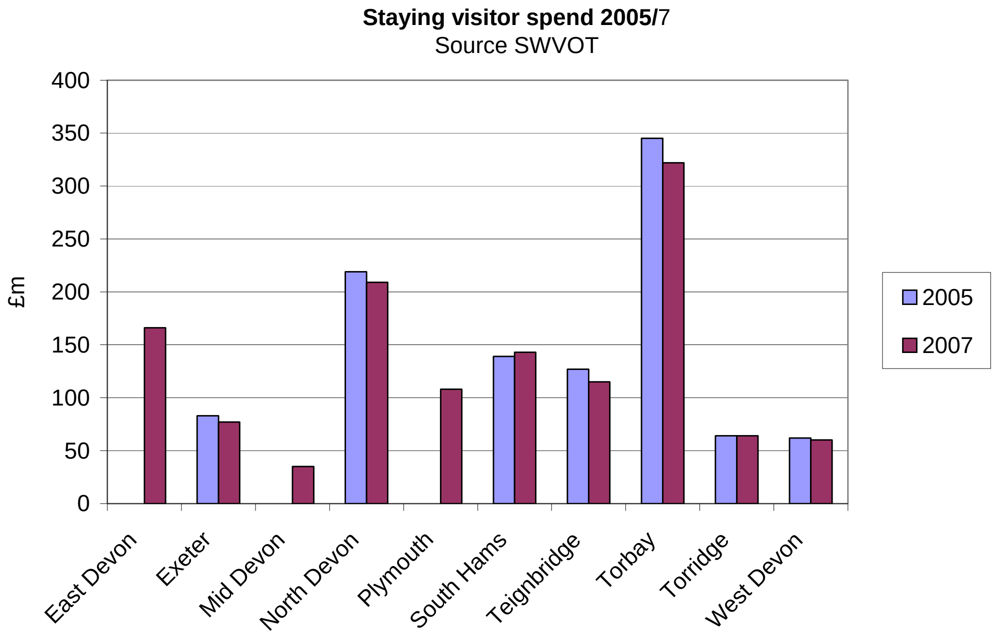
Torbay subscribes to the regional SW Value of Tourism report and has done since its inception in 2001. As the methodology changed in 2005 it is most relevant to look at the change in these figures since 2005:

	2001	**2005**	**2007**
Trips by staying visitors	1,710,600	1,526,300	1,296,200
Staying visitor nights	7,096,000	6,914,300	5,367,300
Spend by staying visitors	£330,175,000	£344,524,000	£322,105,000
Day visits	3,795,000	2,189,000	2,329,000
Spend by day visitors	£92,476,000	£91,651,000	£101,489,000
Other tourism related spend	£19,150,000	£12,905,000	£14,772,000
Jobs related to tourism spending	16,905	14,653	13,060

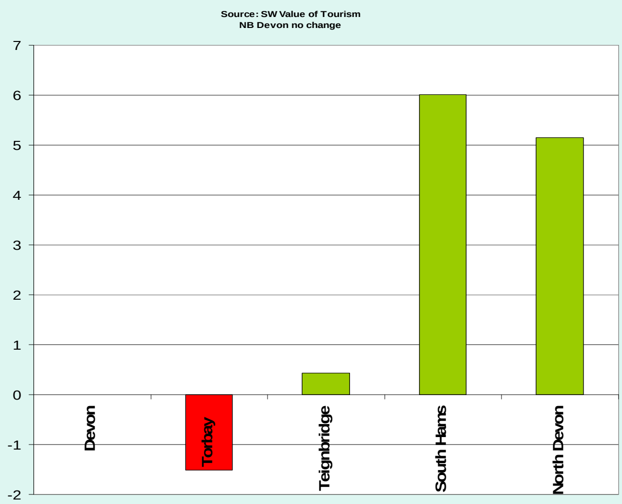
Source 1

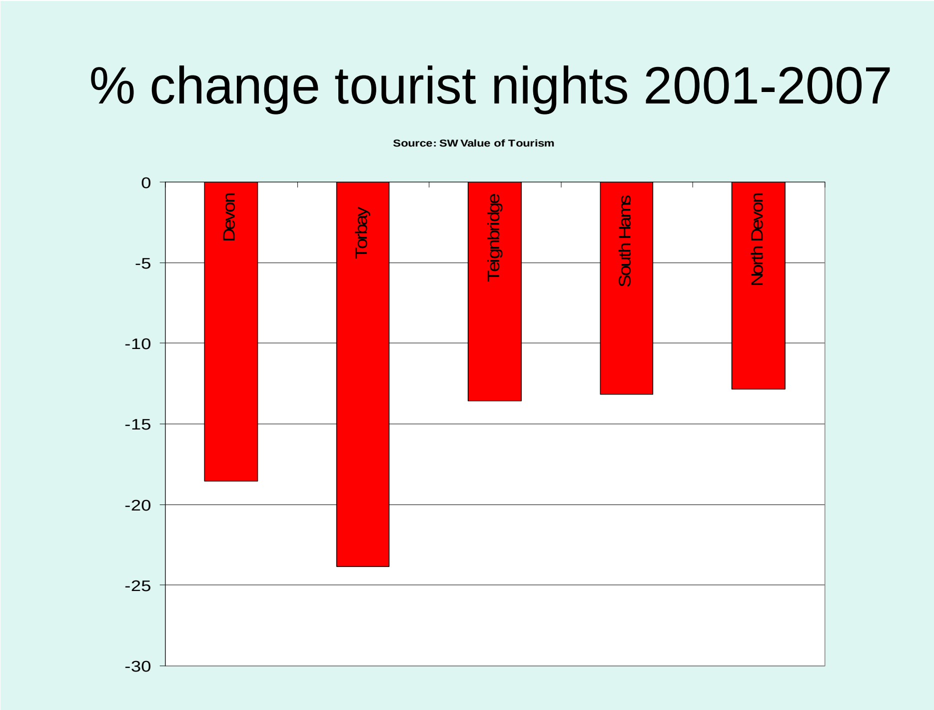
Staying and day visitor spend

The income that Torbay derives from tourism is declining. 24% of Torbay's visitor spend is derived from day visitors. This is the lowest figure for all Devon districts and is indicative of the huge "dormitory" resource that exists in the resort and the extent to which this is supporting tourism spend across the county. Figures for other districts is generally 40-50% with Plymouth the highest at 60%. Spend from staying visitors is performing poorly in many areas but all areas show an increase in spend from day visitors.



Trends in tourist spend 2001-2007





Mode of transport

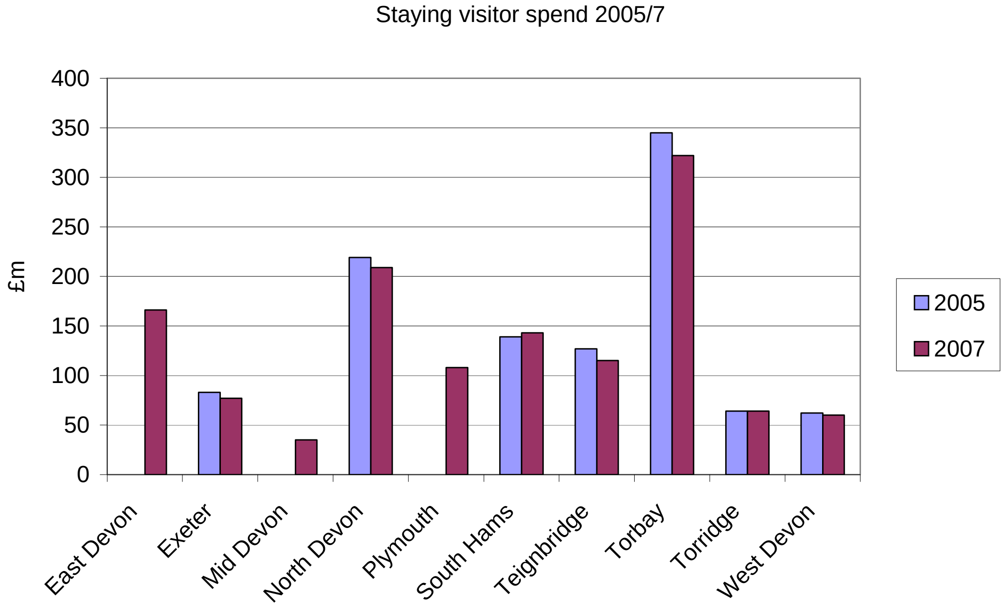
The Torbay Visitor Surveys show the transport used by visitors for the main part of their journey to the resort. Although car/van are by far the favoured method, the results show the significance of both public transport and coach tours for the resort. These trends have been consistent and no major change in preferred mode of transport is forecast.

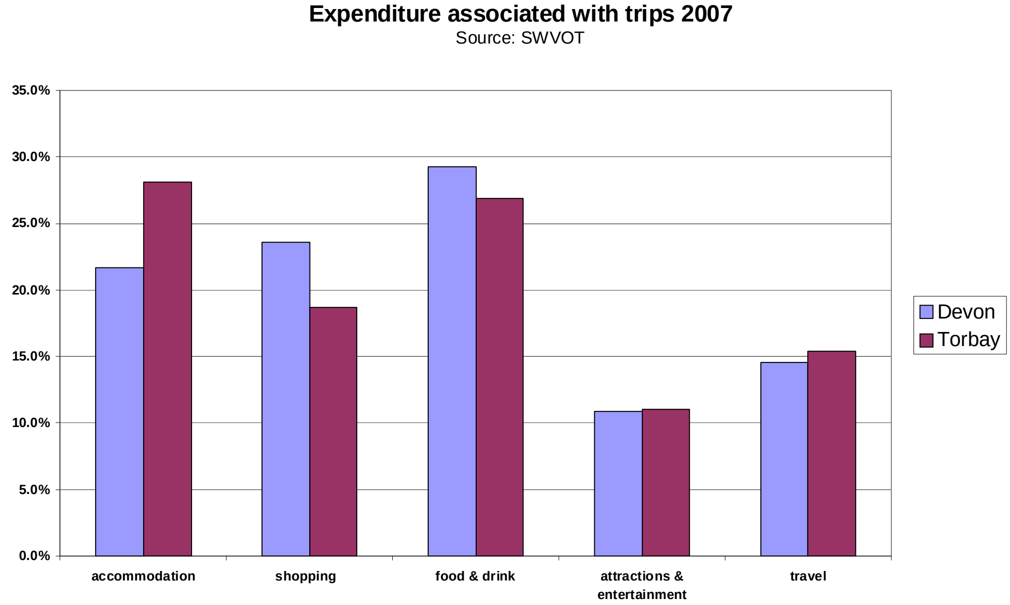
Trends and Values since 2005

The following table presents the official tourism statistics from 2005 with 2007.

English Riviera Tourism Statistics and Value	% trend over 3 years	2007	2006	2005
Domestic Visitors				
trips	- 16.2%	1,192,000	997,000	1,421,000
nights	- 22%	4,782,000	3,825,000	6,090,000
average durations	- 7%	4	3.8	4.3
sub total staying visitor value	- 4.7%	£290,332,000	£198,846,000	£304,551,000
Day Visitors				
trips	+6.1%	2,329,000	2,301,000	2,189,000
sub total day visitor value	+11%	£101,489,000	£97,720,000	£91,651,000
Overseas Visitors				
trips	- 1%	104,200	102,600	105,300
nights	- 29%	585,300	714,600	824,300
average durations	- 38.5%	4.8	6.9	7.8
sub total OS visitor value	- 20.6%	£31,773,000	£33,144,000	£39,973,000
Additional Spend	+ 14%	£14,722,000	£14,176,000	£12,905,000

Source 1





Overseas Visitors

The English Riviera has always attracted a higher than regional average of overseas visitors with the Agatha Christie legacy strengthening its appeal. Overseas staying visitors are reducing at a notably slower rate than domestic staying visitors and generate over £15 million of tourist income in 2007 as the following tables highlight.

Overseas Visitors staying in serviced accommodation

Year	Trips	Nights	Spend	Average PP Value
2007	70,000	202,600	£15,584,000	£222.62
2006	55,700	186,800	£13,274,000	£238.31
2005	64,800	289,400	£19,964,000	£308.08

Source 1

The English Riviera has always attracted a higher than regional average of overseas visitors with the Agatha Christie legacy strengthening its appeal. Overseas staying visitors are reducing at a notably slower rate than domestic staying visitors and generate over £15 million of tourist income in 2007 as the following tables highlight.

The regional average regarding overseas visitors is 5% of the total compared to 11% in 2007 for the English Riviera.

Visiting Friends and Relatives (VFR)

It is important to recognise that VFR has a number of impacts.

- spend of visitors staying with friends and relatives
- additional spend of host families
- spend of staying visitors that

Torbay Visitor Surveys 1999-2007, show that the proportion of visitor that are staying with friends and relatives is in the range 3-7%. The figure for the Easter survey was 4.6%. It is however important to note that 21 respondents (8% of those in holiday accommodation) said it was visiting friends and family that made them choose to visit the resort.

Torbay Tourism Economy

The following tables show the economic value of tourism to the Torbay Economy in respect of employment and GVA.

Top 10 Sectors by Employment			
Sector	**2000**	**2007**	**2012**
Health & Social Care	9,810	10,880	11,460
Retail	7,960	8,160	8,290
Tourism & Leisure	5,610	6,480	7,090
Business Services	3,720	6,210	6,830
Construction	3,530	4,440	4,930
Education	3,480	4,260	4,080
Wholesaling	3,060	2,830	2,950
Other Financial & Bus. Services	1,390	2,120	2,470
Public Admin. & Defence	1,970	1,900	1,800
Electrical & Optical Equipment	3,470	1,360	1,690
source: ABI, NOMIS			

Employment Value	% change	2007	2006	2005
total number of jobs	- 11%	13,060	9,169	14,653
% of total Torbay employment	- 19.3%	21%	16%	26%

Source 1

7. ACCOMMODATION PLANNING FOR TOURISM

The table below summaries the total bed spaces as recorded in the different categories of accommodation in 2007.

Destination	Serviced	Flats and Houses	Holiday Parks	Touring Pitches	Destination Totals
Torquay	13,080	3,630	1,790	0	18,500
Paignton	4,820	3,070	5,800	4,380	18,070
Brixham	560	520	4,710	780	6,570
Category Totals	**18,460**	**7,220**	**12,300**	**5,160**	**43,140**

Source 2

This capacity makes the English Riviera the major dormitory for the county. Benchmarked against the county platform the following facts are highlighted:

over supply of serviced beds
in balance of serviced compared to self catering accommodation
under supply of touring pitches

Industry consultation highlighted the over supply of serviced beds, particularly within the guest accommodation serviced sector (guest houses and bed and breakfasts) which is manifesting itself through:

low occupancy
concern about the future
discounting and continued price wars
reducing reinvestment
low moral amongst many businesses
increasing negative attitude towards the PHAA policy
increasing anti social behaviour as a result of increased numbers of houses of multiple occupancy (HMOs)

The destination total has been in decline for a number of years with 51,500 bed spaces recorded as the destination total in 1999, a decline of 16.3% in one decade.

The greatest losses have been in the serviced sector. The following tables highlight the pattern of loss between 2001 to 2007.

Torbay 2007	Serviced bed spaces total	Flats & Houses	Holiday Park Bed spaces	Touring Pitches	Total
Torquay	13,080	3,630	1,790	0	18,500
Paignton	4,820	3,070	5,800	4,380	18,070
Brixham	560	520	4,710	780	6,570
	18,460	7,220	12,300	5,160	43,140

Source 1

Torbay 2001	Serviced	Flats & Houses	Holiday Park Bed spaces	Touring Pitches	Total
Torquay	15,900	3,350	2,000	0	21,250
Paignton	6,130	3,020	5,930	6,900	21,980
Brixham	680	500	4,310	1,020	6,510

Source 1

Summarised as follows:

Torquay loss of 2820 bed spaces
Paignton loss of 1310 bed spaces
Brixham loss of 120 bed spaces

Ongoing planning applications mean that holiday accommodation levels are fluid. Between 2005 and 2008, 138 holiday accommodation planning approvals were granted.

A number of significant visitor trends should be noted from 2001 and 2007:

overall decline in demand for serviced accommodation
overall increase in demand for self catering accommodation
consistent and growing demand for holiday park accommodation
renewed increase in demand for touring pitches
average durations reducing to 4 nights
increasing shoulder season occupancies

Serviced Accommodation

18,400 serviced beds are currently recorded as being available, with 70% of this total (12,880 beds) in the 4 to 10 bedroom category.

The following table illustrates comparative annual room occupancy for the different sizes of serviced accommodation as recorded in 2007, benchmarked against the rest of Devon.

Month	**J**	**F**	**M**	**A**	**M**	**J**	**J**	**A**	**S**	**O**	**N**	**D**	**Devon Annual Average %**	**Torbay Annual Average %**
Size														
101+	50	63	73	66	72	80	75	85	82	79	61	48	69.5	51.1
51-100	46	60	56	67	73	80	83	84	77	70	58	50	67.0	**74.1**
26-50	38	47	54	58	66	76	74	73	75	62	51	45	59.9	61.3
11-25	38	50	53	55	65	70	71	74	76	64	49	43	63.9	33.5
4-10	26	31	35	44	49	55	60	66	60	43	31	27	44.0	**27.5**
													60.86	**49.5**

Source 2

The following is considered to be of particular significance:

reduction in occupancy to an all time low of 27.5% in the 4 to 10 bedroom category

Further evaluation of the 2007 season in the 4 to 10 bedroom category highlighted the following monthly trends which highlight a major over supply in this category:

2007 4 to 10 Bedrooms	% Bed space Occupancy
January	10.6
February	11.5
March	11.1
April	25
May	27.5
June	40
July	45.2
August	59.4
September	43.4
October	18.4
November	14.3
December	11.5

Moving forward this level of occupancy and operation is considered unsustainable with average annual occupancy levels continuing to decline year on year to an all time low of 27.6% in 2007 compared to an average annual Devon occupancy of 43.9% for 4 to 10 bedroom serviced accommodation in 2007. The average annual minimum occupancy considered as viable is 60%.

With demand forecast for modern hotels recommendations are made to significantly reduce the number of bed spaces in this category of accommodation through a robust review of the PHAAs allowing change of use.

Managing Change of Use

The need to manage the change of commercial tourism accommodation to residential use is highlighted as a key priority in light of the growing number of HMOs not only in Torbay but in all coastal towns across the UK with depressed neighbourhoods negatively impacting local economies. This matter is now on the national agenda with the increasing recognition of the direct correlation between depressed neighbourhoods negatively affecting local economies. This campaign is being supported by the work of the British Association of Resorts and Destinations (BRADA). Industry consultation highlighted increasing concern with regard to the impact of anti social behaviour from HMOs negatively impacting the visitor experience. The release of more guest houses for residential use could fuel this problem.

Hotel Accommodation

There is currently an imbalance in hotel accommodation v guest accommodation on the English Riviera. Hotel stock currently represents approximately 30% of total beds compared to 50% in Bournemouth which is seen as a comparable and successful destination.

Current levels of 3 star and 4 star nationally accredited hotel bed stock on the English Riviera has been declining and is currently as follows:

3 star hotels 2276

4 star hotels 1855

Within this category of accommodation a mix of leisure and business is being targetted with a growing reliance on advance bookings from group coach operators. Seasons are lengthening through increased occupancies being recorded in the shoulder season months.

Average occupancies for the 51-100 3 star bedroom category have been bucking the downward trend with a high of 74.1% recorded in 2007.

Moving forward Business Tourism has been identified as a crucial growth area to facilitate all year round operations and with these markets increasingly demanding the services of top quality 3 star and increasingly 4 star high tech hotels a short fall has been identified and the potential need for 400 additional bed spaces in the 3 star to 4 star hotel category up to 2026.

This increased stock will allow the English Riviera to be become more robust and competitive in respect of its ability to attract higher spending leisure guests and attract more conference business which it is currently not securing due to too few quality beds. In addition the provision of 400 new bedrooms at this level of hotel will provide potentially 400 new full time jobs.

Inward investment is seen as key and the need to recognise the growing importance of branded products. The current portfolio of serviced accommodation needs to be broader and product gaps filled in order to attract new visitors to the destination.

Changing expectations mean an increasing number of today's visitors want to spend their holidays in good value, high quality modern properties. This means that traditional seaside accommodation, which had its heyday in the 1970s, no longer has enough appeal to attract new customers and achieve the key objectives. All stakeholders need to accept these trends.

Increasing demand for modern seaside accommodation is supported by the announcement by Travel Lodge in 2008, to build 55 new coastal travel lodges over the next five years because of their belief in the renaissance of seaside resorts. **Source 3**

Flats and Houses (Self Catering)

7,220 flats and houses were formally recorded as available for holiday accommodation in 2007. **Source 2**

With the exception of a slight reduction in 2007 the number of holiday flats and houses across the English Riviera has been increasing year on year and currently represents 16.7% of total holiday accommodation.

The English Riviera Tourist Board currently promotes 31 individual providers of self catering accommodation including major multi unit self catering agency operators.

Since 2001 Devon County Council has been recording as part of the annual Tourism Trends in Devon report an annual increase in the number of nights being spent in flats and houses and anecdotal evidence from consultation with leading self catering operators confirm this upward trend and in particular the increasing demand contemporary high quality holiday apartments. The increasing purchase of second homes as holiday homes in Devon has fuelled this trend with significant stock being sub let for holiday use particularly through agency operators.

There is currently no comparable self catering occupancy survey conducted in the South West on which to benchmark as for serviced accommodation but moving forward the demand for quality self catering holiday accommodation is expected to continue. The freedom that self catering offers, privacy and increasing standards is being increasingly welcomed by visitors.

The value of visitors staying in flats and houses has increased by over £7m since 2005 and has been increasing at an average rate of 1% since 2001.

Year	Trips	Nights	Spend	Average PP Value
2007	136,000	886,000	£51,437,000	£378
2006	105,000	622,000	£37,487,000	£357
2005	141,000	934,000	£43,031,000	£305

Holiday Parks

The English Riviera has 12,300 Holiday Park bed spaces officially recorded. **Source 2**
In the last 5 years a growth of 8% in numbers and a 22% in visitor spend has been recorded by leading UK operators at a national level and holiday parks now represent 17% of all domestic UK holidays. **Source 3**

The seaside holiday camp/park has been in decline for many years. However, in recent years holiday parks have been subject to something of a revival and their fortunes appear to be improving.

In the last 5 years a growth of 8% in numbers and a 22% in visitor spend has been recorded by leading operators and holiday parks now represent 17% of all domestic UK holidays. **Source 4**
Holidaying at a Holiday Park is now very much back in fashion with Center Parcs helping to boost the traditional image.

Of importance is to note the changing makeup of Holiday Parks with approximately 80% of the UK market now owner-occupied as potentially caravan second holiday homes that the owners may choose to use exclusively or to sub let. As such monitoring demand and assessing economic value is more difficult with potentially only 20% of the total of holiday park bed spaces being recorded and monitored through official tourism statistics.

The significance of Holiday Parks is further heightened when the touring caravan pitches are included with many Holiday Parks offering a choice of static and touring pitches the latter of which is currently recorded separately by official tourism statistics. Combined Holiday Parks potentially represent some 40% of all bed spaces in Torbay and as a result are a core component of holiday accommodation offer.
There is currently no comparable holiday park hire fleet rental occupancy survey conducted in the South West on which to benchmark as for serviced accommodation but anecdotal evidence across the English Riviera indicates average annual occupancy figures of around 70% are currently being achieved for hire fleet rentals but holding these levels is proving increasingly challenging.

The continued appeal of Holiday Parks is forecast long term for the following reasons:

- increasing appeal to the family market as standards and facilities improve
- continued appeal to buy holiday caravans by the sea as second homes
- continued growth in the retired market and poorer pensioners seeking best value

Allowing for a growth in annual occupancy of up to 85% the current stock of 12,300 bed spaces is believed to represent an over supply and qualitative assessment indicates that there is scope for reducing the number of hire rental caravan bed spaces to 10,000 bed spaces.

Consideration to the importance of destination management is highlighted in particular for the future planning of Holiday Parks across the English Riviera. Holiday Park bed spaces are currently concentrated in the Brixham area.

Moving forward the following recommendations are made in respect of the future development potential for the towns individual identities:

- concentrate future development of holiday park development in and around Paignton
- reduce concentration of holiday park development in Brixham to allow for diversification of bed stock development and the introduction of more contemporary serviced and luxury self catering accommodation in order to attract more of the AB1 market that is potentially attracted to it

Market forces will in itself lead to a downward decline in the number of units available for holiday letting with a natural loss of pitches as parks redevelop to cater for larger units with better spacing and expansion of parks across Torbay restricted by the scarcity of development land.

Moving forward to 2026 key objectives must be:

- encourage upgrading and improvement of parks
- removal and release of the old ‘chalet’ park format that is not cost effective to improve
- protection of a minimum of 10,000 holiday park bed spaces through the adoption of a new holiday accommodation planning viability test to protect the best accommodation

Planning policies will need to be revised to accommodate the recommendations through the adoption of:

- reduction in PHHAs to enable change of use within the 4 to 10 bedroom category
- introduction of new Core Tourism Development Areas aligning to the Mayor’s Vision
- adoption of new viability test to protect best holiday accommodation across Torbay
- measure to protect the Riviera from an increase in Houses in Multiple Occupation as uses change

Value of Holiday Park Visitors

On the English Riviera, Holiday Park visitors represent the second highest income generator with total spend increasing year on year and totalling £40,897,000 in 2007 as highlighted in the following table:

Year	Trips	Nights	Average Duration	Spend	Average PP Value
2007	164,000	882,000	5.4	£40,897,000	£249
2006	163,000	869,000	5.3	£36,322,000	£222
2005	191,000	1,022,000	5.3	£33,768,000	£176

Source 1

Of significance is the fact that Holiday Park values are bucking the overall downward decline both in terms of durations and value which combined with their employment ratios of one full time member of staff for each unit making the Holiday Park sector of huge significance to the local economy.

Industry consultation identified the following trends:

demand for basic chalet and caravan product in significant long term decline
increased demand for premium caravan / lodge product
increased demand for year round short breaks
increased demand for caravan holiday home ownership as second homes

The Holiday Park model is changing fast with the majority of static caravans on Holiday Parks now owner-occupied. The long term forecast is for this trend to continue with market forces continuing to play a major part with a natural decline in the number of units as larger units are installed.

Touring Pitches

The number of touring pitches in Devon reduced by 8% from 2001 to 2007. Over the corresponding period a loss of over 35% (2760 pitches) was recorded for the English Riviera. Industry consultation highlighted a potential shortage in the number of touring pitches across the destination and in particular the provision of hard standing pitches for larger modern touring caravans and motor homes.

Second Homes

The purchase of second homes has until recently been an increasing trend in the South West with their use in part as holiday accommodation. This trend is fuelling the increased supply of quality self catering holiday flats and houses. Official tourism statistics collated by South West Tourism for the English Riviera support this trend with particular growth in nights and spend as the following table highlights.

Year	Trips	Nights	Spend
2007	9,000	59,000	£1,814,000
2006	9,000	30,000	£1,142,000

Source 1

Market forces will control the number of second homes made available as holiday accommodation but the long term forecast is further growth.

Boat Moorings

The increased importance of boat moorings and visiting yachts as holiday accommodation needs to be highlighted with significant increases recorded in the table below.

Year	Trips	Nights	Spend
2007	8,000	31,000	£917,000
2006	5,000	19,000	£565,000
2005	2,000	19,000	£109,000

Source 1

Marina capacities are now at full capacity. There is considered great potential to increase the value of Boat Mooring visitor spend with neighbouring areas netting four times this level.

Language Schools

Language Schools present an important part of the visitor economy attracting students from all over the world and generating an income in excess of £8 million. The following table shows trends since 2005 from students officially registered as staying in private houses.

Year	Trips	Nights	Spend
2007	10,000	159,400	£8,254,000
2006	14,300	176,300	£10,072,000
2005	10,100	189,800	£8,591,000

Source 1

8. MARKETING REVIEW

The following table presents a summary of marketing activity between 2007 to 2009.

Activities	Date	Quantity	Cost/Income £	Comments	Evaluation
Marketing plans	2009 2008 2007			Not available for review	
Advertising spend	2008/09 2007/08		75,000 99,688	Shopping centres road show	
PR plan	2009 2008 2007		7,000	Ongoing national press coverage	
English Riviera Holiday Planner	2009 2008 2007	150,000	149,000	self funding (£228k income) to include design, print, distribution via railway and motorway stations, TIC network, englishriveira.co.uk plus national media campaign (£65k)	
English Riviera Holiday Planner reply card	2009 2008 2007			Response significantly reducing	855 to date 1896 2400
Energise Brochure	2008	10,000	16,088 (income 3,500)	Distribution through outdoor enthusiasts magazine, plus pick and pack service and englishrivera.co.uk	
Fun for Kids Brochure	2008	5,000	8,720 (income 0)	Available through pick and pack service, englishriveira.co.uk and TICs	

Flybe promotion	2008	75,000	21,750 (income 0)	Distributed on inbound routes and OS exhibitions	
Beaches Guide	2008	10,000	10,200 (income 1,750)	Available through pick and pack service, englishriveira.co.uk and TICs	
Events and Festivals	2008		3,068 (income 0)	Available through pick and pack service, englishriveira.co.uk and TICs	
Group Travel Guide Income	2008		18,448 (income 6,738)	Group Leisure Magazine, trade databases, exhibitions	
Agatha Christie, Individual events Walking, Gardens, Weddings Mini Guides	2009			Available through pick and pack service, englishriveira.co.uk and TICs	
BRADA campaigns			6,900		
Market Research	2009		2,000	Contribution to Visit Devon collective benchmarking using STEAM	

As at June 4th 2009

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Glossary of Terms

ATP	Area Tourism Partnership
B&B	Bed and breakfast accommodation
BH&HPA	British Hospitality and Holiday Parks Association
BID	Business Improvement District
CEO	Chief Executive Officer
BRADA	British Resorts and Destinations Association
CIC	Community Interest Company
CLG	Company limited by guarantee
CMS	Content Management System
Consumer	Someone who purchases goods or services
CRM	Customer Relationship Management
Customer	Someone who purchases goods or services
Day visitor	Someone who visits for a day from a local or regional market
DCMS	Data Collection Management System operated by Visit England
DCC	Devon County Council
DDA	Disability Discrimination Act
Destination management	Management of all infrastructure and services for visiting tourists
DINKs	Dual income, no kids
DMO	Destination Management Organisation
DMS	Destination Management System
EDC	Economic Development Company
EEAE	Enjoy England Awards for Excellence
EFE	England for Excellence
ER	English Riviera
ERAP	English Riviera Attractions Partnership
ERGO	English Riviera Geopark Organisation
ERTB	English Riviera Tourist Board

ERTC	English Riviera Tourism Company
Flats and Houses	Self catering accommodation such as flats, houses, cottages not forming part of Holiday Parks
FOC	Free of charge
Gateway Locations	Major points/routes of arrival and departure
GTBS	Green Tourism Business Scheme
GVA	Gross value added, the national economic benchmark
HMOs	Houses of Multiple Occupancy
£k	£1000
Local area	The English Riviera
LDF	Local development framework
LGA	Local government association
Local market	Residents (and staying guests) of local and regional areas
Longer holiday	Leisure stay of 4 nights or more
MARCOMS	Marketing and Communications
Maritime Leisure	Water Leisure Activities
NOMIS	Official labour market statistics
NQAS	National quality assessment scheme
PHAAs	Principle holiday accommodation areas
PP	Per person
PPN	Per person per night
PR	Public Relations
Regional area	Devon, Cornwall, Dorset and Somerset
ROI	Return on investment
SEO	Search Engine Optimisation
Serviced Accommodation	Hotels, motels, guest houses, B&Bs, farmhouses, pubs
SF	Self funding
Short break	Leisure stay of 1 to 3 nights
SINKs	Single income, no kid's market segment
SME	Small and medium sized enterprise
Sustainable tourism	balancing the needs of the visitor and environment
SWOT	Strengths, weaknesses, opportunities, threats
SWRDA	South West Regional Development Agency
SWT	South West Tourism
TAP	Torbay Accommodation Providers
TCCT	Torbay Coast and Countryside Trust
TDA	Torbay Development Agency
TSCA	Torbay Self Catering Association
TTCC	Torbay Town Centre Company
TICs	Tourist information Centres
THA	Torbay Hospitality Association
Touring Pitches	Touring caravans, motor caravans, tents and trailer-tents
USP	Unique selling point
VAQAS	Visitor Attraction Quality Assurance Scheme
VB	Visit Britain
VD	Visit Devon
VE	Visit England
VFR	Visiting Friends and Relatives
Visitor	Someone who visits the English Riviera as a tourist
VOT	Value of Tourism (statistics produced by SWT)
%	Percentage

Turning the Tide for Tourism in Torbay was prepared on behalf of the Torbay Development Agency and Torbay Council by Close Focus Tourism Consultancy

ANNEX 1 – INDUSTRY CONSULTATION SURVEY QUESTIONNAIRE

1. Achievements and Successes

1.1 What do you see as the key tourism achievements and success stories across the English Riviera in recent years?

1.2 What achievements, successes and investments have you made at your own business in recent years?

2. Recent Trends

To ensure that we are up to date on trends since the last official regional statistics were collected in 2007, please could you share below, the trends you have been experiencing at your own business e.g. growth, decline, stability, seasonality, booking patterns, number and origin of overseas visitors and whether your business is targeting individuals or groups.

2.1 2008 trends:

2.2 2009 trends and forecasts:

2.3 Forecast for 2010:

3. Opportunities for growth

3.1 What do you see as the key opportunities for growing the value of tourism on the English Riviera?

3.2 What markets do you recommend the new strategy should focus on to achieve this growth?

3.3 If you could do just one thing to help the tourism industry grow again what would that be?

4. Strengths

What do you see as the English Riviera's **key strengths** as a visitor destination?

5. Weaknesses

What do you see as the English Riviera's **key weakness(s)** as a visitor destination?

6. Threats

What do you see as the **key threat(s)** to the English Riviera continuing as a leading visitor destination?

7. The English Riviera Brand and Brand Development

As a consultancy we strongly believe in the power of developing compelling brands that make visitors fall in love with a place, want to return and recommend it to others.

7.1 If you had to sum up the English Riviera Brand in a few words what would they be?

7.2 In your opinion should the English Riviera Brand be retained as an integral part of the revised Tourism Strategy? Yes/No and please give your reasons.

8. The English Riviera Towns and Individual Areas

The English Riviera as a destination is fortunate to be made up of a number of different places, each with their own local distinctiveness and character. What do you see as the key strengths and opportunities for growth in each of the following areas:

8.1 Torquay:

8.2 Paignton:

8.3 Brixham:

8.4 Babbacombe & St Marychurch:

9. Key Tourism Issues

It is vital that the revised tourism strategy takes on board and understands any key issues that are adversely affecting the successful development of the tourism industry across the Bay.

Please could you describe below any factors that are currently adversely affecting the development of your own business. For example: planning regulations, including change of use and/or the current principal holiday accommodation area (PHAA's) policy, industry regulations, marketing, quality, staff recruitment, training or any other issues.

10. Marketing and Promotion of the English Riviera

We have noted as an independent consultancy that there appears to be significant duplication of offline and online marketing effort. As part of this project we will be undertaking an independent marketing review and making recommendations based on our extensive marketing experience.

In the space below please would you share with us your personal views and recommendations for the effective marketing of the English Riviera as a visitor destination in the future:

11. Have we missed anything?

Please express here any additional comments that you would like to make us aware of or attach a separate piece of paper as required:

ANNEX 2 - EASTER VISITOR SURVEY QUESTIONNAIRE

Introduction:

Hello – I am a student at South Devon College in Paignton. We're doing a survey for the Torbay Development Agency to help plan future tourism developments. Can you spare a few minutes to answer a few questions? (advise it should take about 5 minutes).

1. Are you ….. (tick one)

[ ] 1 A visitor staying in the area (staying on holiday in Torquay, Paignton or Brixham)
[ ] 2 A resident of Torbay Go to Q 7 (live in Torquay, Paignton or Brixham)
[ ] 3 A day visitor Go to Q 7 (live in the SW and visiting for the day)

2. How long are you staying?

[ ] 1 1-4 nights
[ ] 2 5 nights +

3. What style of accommodation have you chosen to stay in?

[ ] 1 Hotel
[ ] 2 B&B
[ ] 3 Guest House
[ ] 4 Holiday Park
[ ] 5 Camping and Caravanning
[ ] 6 Staying with friends and relatives
[ ] 7 Language School
[ ] 8 Other

4. Are you on holiday with?

[ ] 1 Your partner
[ ] 2 Your family
[ ] 3 Other, please specify

5. Would you mind if we ask how much approximately you will be spending on your stay including spending money and eating out?

Total spend	How many people?	How many nights?
£		

6. **How did you <u>gather information</u> about your visit?**
(Read list to prompt interviewee, tick all that apply)
[ ] 1 Previous visit
[ ] 2 Recommendation
[ ] 3 Websites
[ ] 4 Newspapers or magazines
[ ] 5 English Riviera Official Holiday Guide
[ ] 6 Other Holiday brochure(s)
[ ] 7 Any other sources of information?
Please specify ____________________________________

7. **How did you <u>book</u> your Easter holiday?**
(Read list to prompt interviewee, tick one)
[ ] 1 Online
[ ] 2 By phone
[ ] 3 By post
[ ] 4 Other, please specify ______________________________________

8. **What was it that made you choose to visit this area?**

9. **Have you visited the English Riviera website <u>www.englishriviera.co.uk</u>?**
(show image)
[ ] 1 Yes [ ] 2 No (go to Q6) [ ] 3 Don't know (go to Q6)

. **If yes did you find the English Riviera web site helpful?**
[ ] 1 Yes [ ] 2 No [ ] 3 Don't know

10. **Did you visit other websites to help you find out more about this area?**
[ ] 1 Yes [ ] 2 No (go to Q7) [ ] 3 Don't know (go to Q7)

b. Which ones were they?

ALL RESPONDENTS

11. **Have you visited any of the Tourist Information Centres in Torquay, Paignton or Brixham during this visit or within the last month?**

[ ] 1 Yes [ ] 2 No [ ] 3 Don't know

12. **What is it that you particularly like about …**

a. Torquay?

b. Paignton?

c. Brixham?

d. Other areas of Torbay?

13. **When describing this area to your friends and family do you usually call it……. (tick one)**

[ ] 1 Torbay
[ ] 2 The Bay
[ ] 3 The English Riviera
[ ] 4 By the town name – i.e. Torquay, Paignton or Brixham
[ ] 5 Other, please specify) ________________________________

14. **Are you aware that this area is known as the English Riviera?**

[ ] 1 Yes [ ] 2 No [ ] 3 Don't know

15. **Where is your favourite place or spot on the English Riviera?**

16. **What is the one thing you LOVE most about the English Riviera?**

17. If you had to describe the English Riviera in a few words what would they be?

18. Will you be returning for a holiday/day visit on the English Riviera in the future?

[ ] 1 Yes [ ] 2 No [ ] 3 Don't know

19. If yes, are there any which facilities would persuade you to visit more often and further improve the enjoyment of your visit?

20. How likely would you be to recommend to friends or family, from outside the area, that they should visit or spend time in The English Riviera?

[ ] 1 would definitely recommend
[ ] 2 might recommend
[ ] 3 would NOT recommend

If not, why wouldn't you recommend the English Riviera?

21. Please would you be kind enough to tell me the age group that you fall into and your profession:

(show)

[ ] 1 16 - 24
[ ] 2 25 - 44
[ ] 3 45 - 64
[ ] 4 65+

Profession ______________________________________

Male / Female (delete)

22. Finally - I need to take some information, which is only to verify that we have spoken today:

Postcode : ______________________ **OR** place of main residence: _______________________

OR tick here if non-UK [ ]

THE FOLLOWING IS FOR VERIFICATION PURPOSES ONLY AND YOUR DETAILS WILL NOT BE USED FOR ANY OTHER PURPOSE OR GIVEN TO ANY 3RD PARTY.

Name : ____

Telephone number : ________________ **OR** Email: ________________________

Thank you VERY much for taking part in this survey

Interviewer to record after questioning: Date of interview _____________ Time of interview ____________________ Location of interview ___________________ Initials of interviewer _________

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