

Overview of 2011/12

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2011 Overview

Whilst far from being an easy year for businesses Value of Tourism estimates for Torbay in 2011 show;

- 1% increase in staying trips
- 1% decrease in staying visitor nights
- 1% decrease in staying visitor spend
- 2% increase in day visits
- 1% increase in day visitor spend



2011 UK staying visitors

Domestic (UK) staying visitors

- 3% increase in staying trips
- 1% decrease in staying visitor nights
- 1% decrease in staying visitor spend
- Increases in holiday visits and visits to friends and relatives the key drivers to growth



2011 Overseas staying visitors

Overseas staying visitors

- 13% decrease in staying trips
- 2% increase in staying visitor nights
- 1% decrease in staying visitor spend
- Increases in visits to friends and relatives and study visits, however, decreases in holiday and business visits causing the overall decrease in volume



2011 overall volume and value

All visitors (day and staying)

- 1% increase in all visitors (approximately 4 million in total)
- No change in all visitor spend levels (approximately £371 million)



Drivers for change

We could assume that volume growth happened by chance but surely there are too many good things going on locally for that to be the case?



The council is responding to calls from the Bay's business community to review its parking policies and devise ways of encouraging shoppers and other visitors into the town centres.

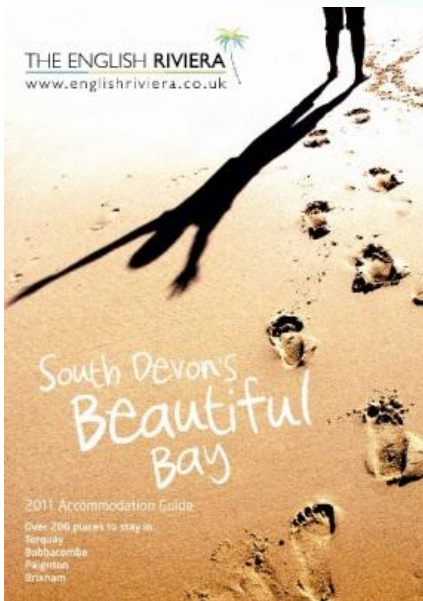
Torbay has topped the charts for the second year in a row with the best beaches in the country, scooping a fantastic 15 awards - more than anywhere else in the country.

As a direct result of the continued investment being made by the English Riviera Tourism Company (ERTC) in its digital marketing strategy, the company received a coveted gold and a silver award at the 2012 Visit Devon Tourism Awards making a total of four awards related to its digital marketing activities in less than 12 months.

Specifically in 2011



The Agatha Christie Festival 2011 influenced an additional £342,000 spend with a return on investment of £23 for every pound spent.



The 2011 Accommodation Guide influenced an additional £6.2 million spend with a return on investment of £35 for every pound spent.

2012 – A year to remember



2012 – A year to remember?

Poor economic climate

Weather

Challenging

Fuel costs

Business rates

Recession

Impact of events

Mixed performance

Later booking patterns

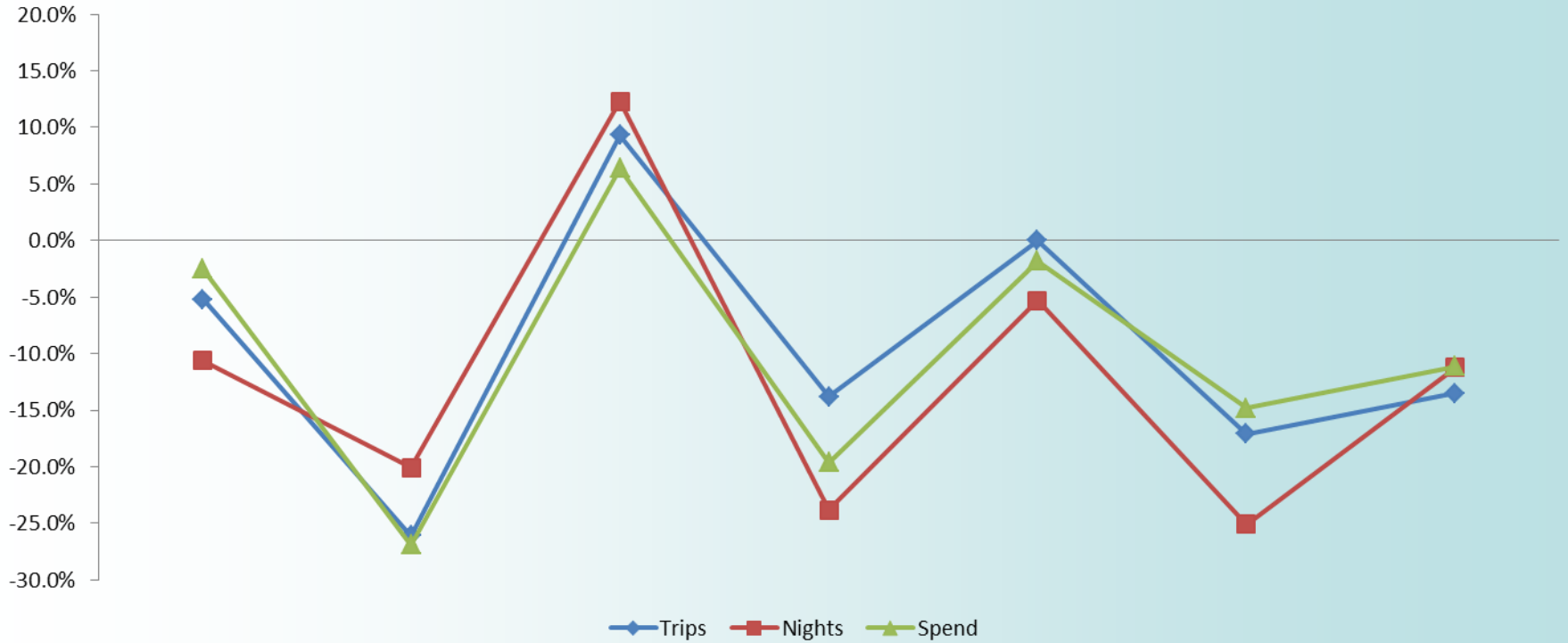
VisitEngland Research

The Great Britain Tourism Survey (GBTS) covering domestic tourism from January to July 2012 estimates for the South West;

- 11% decrease in trips (approx. 1,250,000 trips)
- 14% decrease in nights (approx. 6,300,000 nights)
- 11% decrease in spend (approx. £273m)



GBTS change by month



	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12
Trips	-5.2%	-26.1%	9.3%	-13.8%	0%	-17.1%	-13.5%
Nights	-10.6%	-20.1%	12.3%	-23.8%	-5.3%	-25.1%	-11.2%
Spend	-2.5%	-26.9%	6.4%	-19.6%	-1.8%	-14.8%	-11.1%

VisitBritain Research

The International Passenger Survey (IPS) from January to June 2012 provisional estimates for the South West;

- 9% decrease in trips (approx. 84,000 trips)
- 12% decrease in nights (approx. 785,000 nights)
- 18% decrease in spend (approx. £76m)

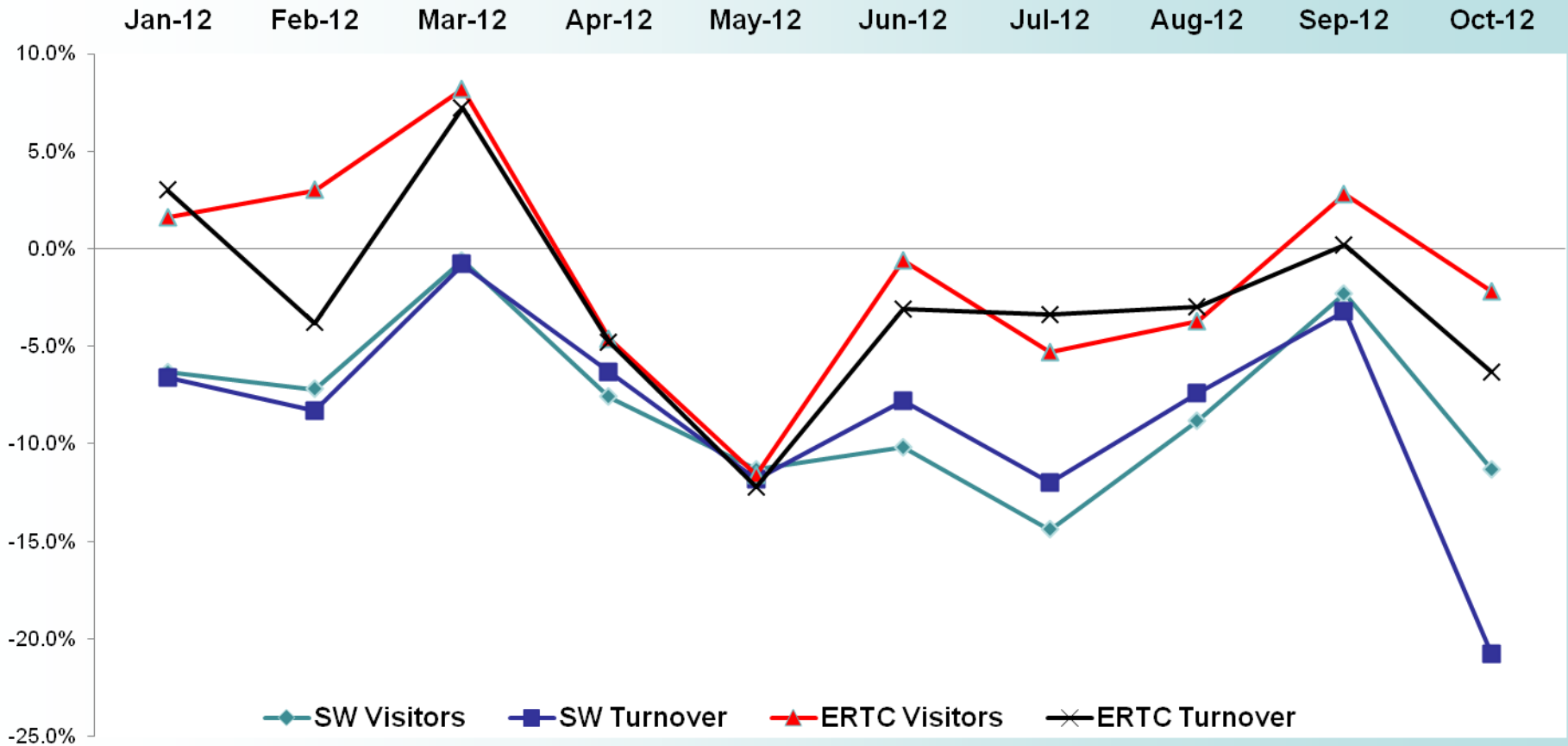


What the national surveys say

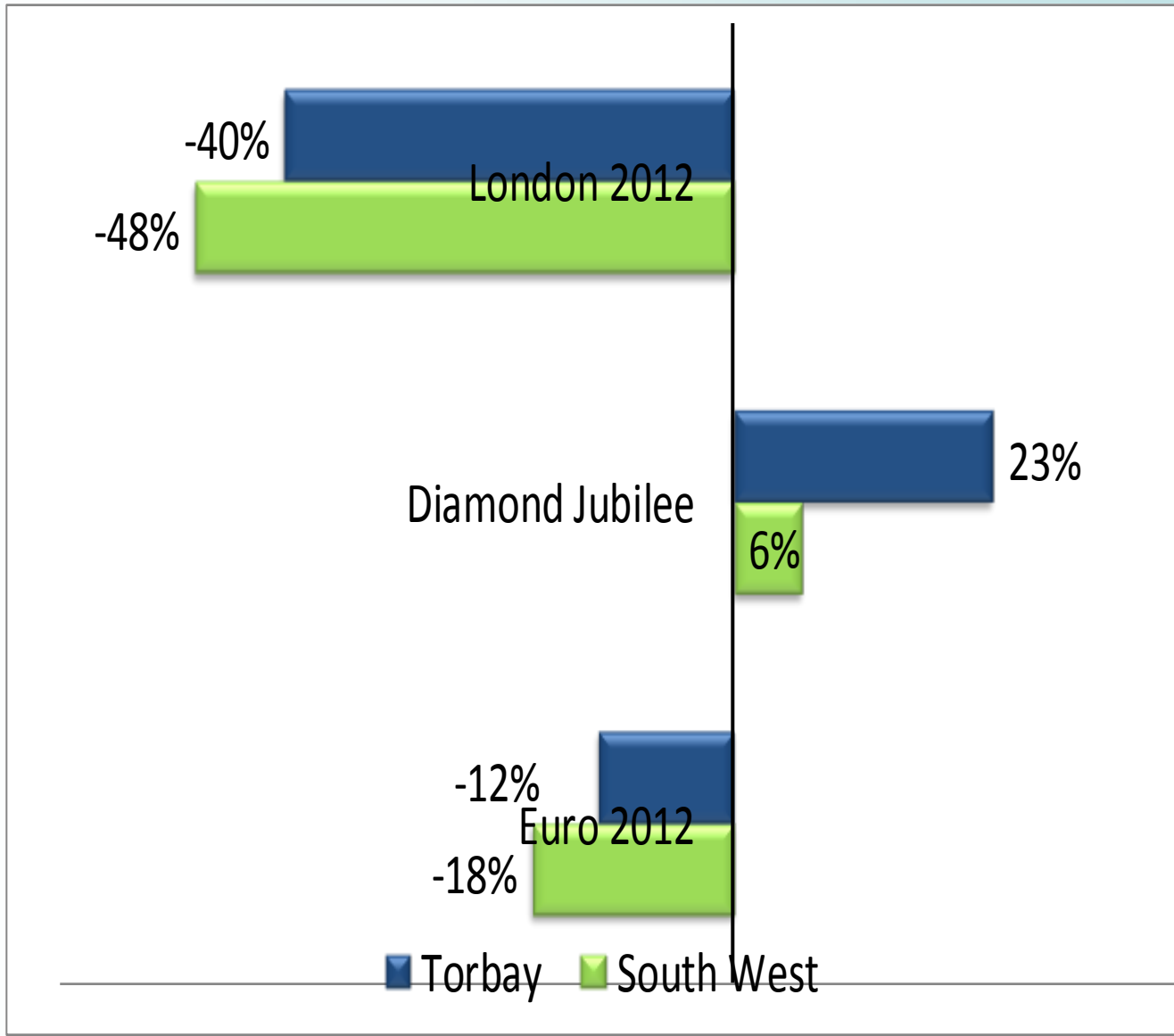
The combined data for the available months from the national surveys estimate;

- Decrease of approximately 1.3m trips
- Decrease of approximately 7.1m nights
- Decrease of approximately £349m spend

Torbay How's Business research



How's Business events



Torbay serviced occupancy

Offers a slightly more optimistic picture than the regional and national surveys for 2012, however, results are based on a small sample.

- January to September comparisons between 2011 and 2012 estimate a 4% increase in both room and bed occupancy in Torbay

Jan-Sept average	Room	Bed
2011	40%	32%
2012	44%	36%

Challenging times – but don't forget

Yes it's been a challenging year, however;

- Good proportions of businesses are exceeding 2011 levels or maintaining business levels
- The South West still has a large and loyal army of visitors many of whom visit year on year and often more than once a year
- Learning from successful businesses, investing in research based marketing and monitoring/understanding visitors needs is probably more essential than ever in these times to maintain levels of tourism activity

Moving forward – get involved

Survey fatigue is a real issue amongst businesses, however, participation in local surveys offers;

- The best chance for your comments to be heard and acted upon
- The best chance for you to understand what is happening locally and learn from others
- The best chance for the ERTC to continue to support the industry, react to business issues and develop well informed marketing plans

Moving forward – How's Business

After reviewing the current format with the ERTC data collection from 2013 through this survey will;

- Continue to monitor visitor and expenditure levels
- Collect basic, easy to provide occupancy data
- Monitor the impact of events throughout the year

The more that take part the more useful it becomes to all

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