

Supporting the recovery of tourism in northern Devon

June 2021



NORTH DEVON+
DELIVERING POSITIVE CHANGE

Areas of investigation

- How badly have tourism businesses in northern Devon been impacted by the pandemic?
- What measures will help individual businesses to recover?
- What are business views on the recovery of tourism as a whole in northern Devon?
- What aspects of destination management are the most important in the next 3 years?
- How well do we currently perform as an area?
- What are the challenges, opportunities and priorities?
- What level of support for collective action?

3 pieces of research

(a) Current needs and priorities of individual businesses



Online survey

(b) Business views on needs and priorities for recovery of the area as a whole



Telephone survey

(c) Stakeholder views on needs and priorities of the area?



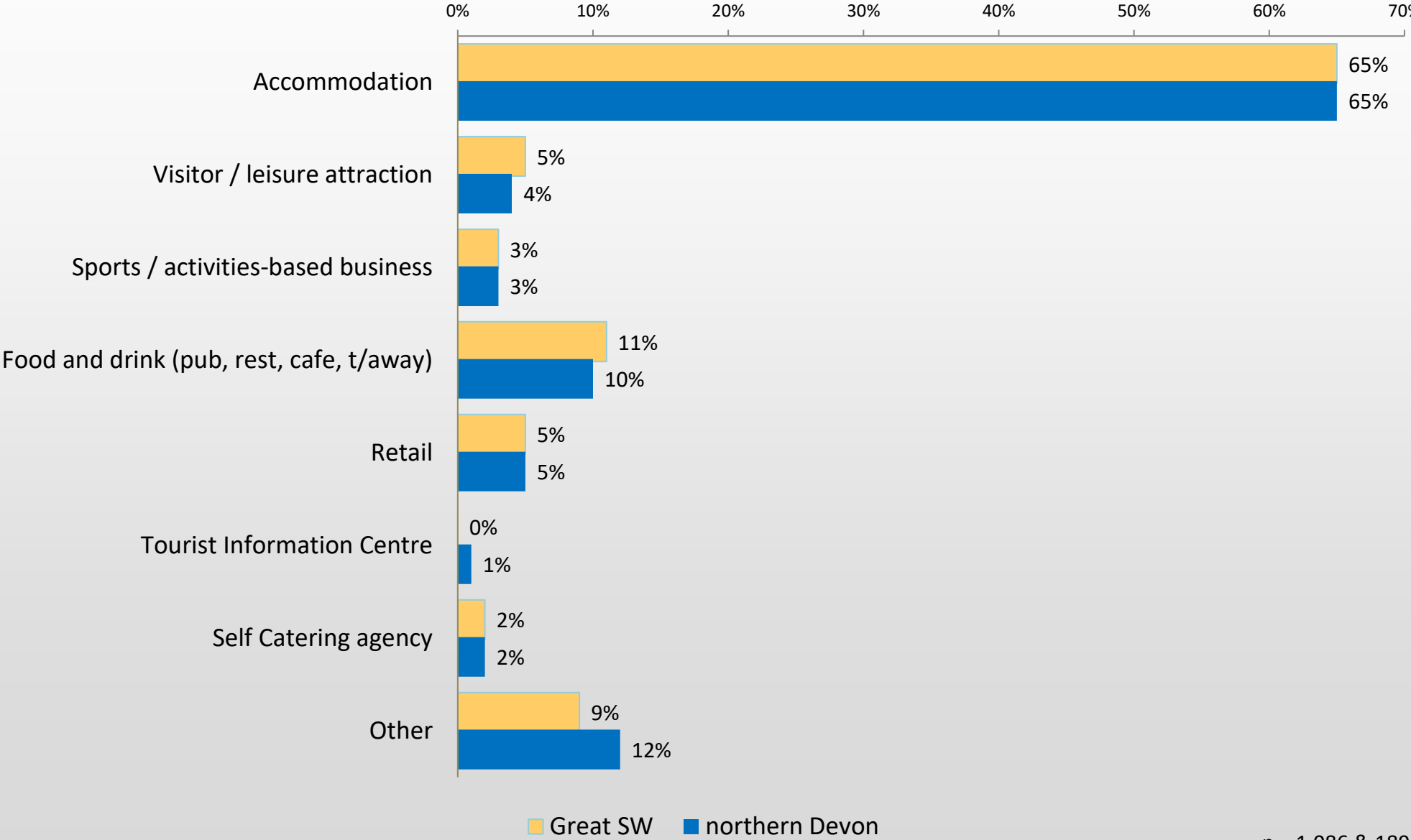
Interviews

1

Results of the online survey

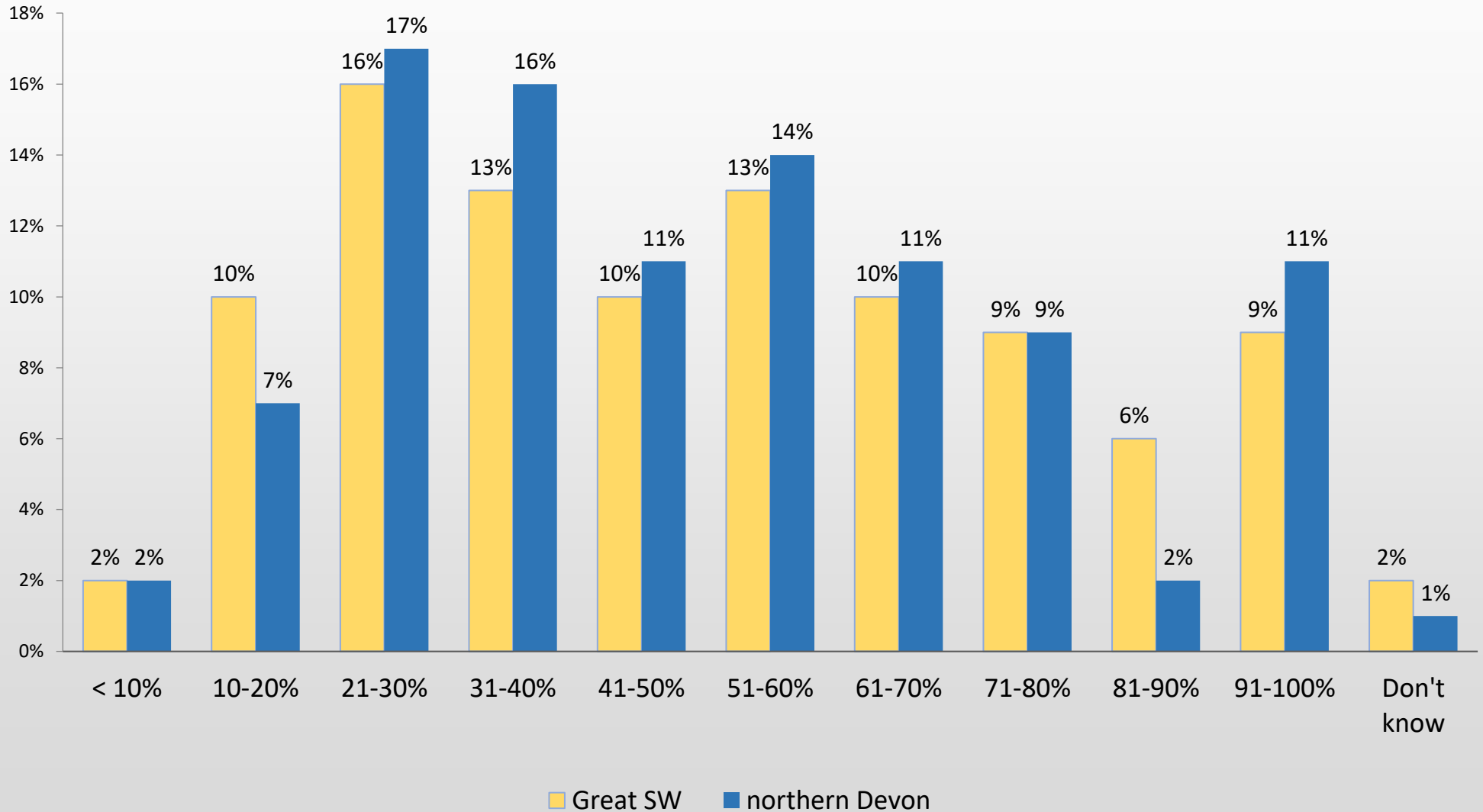
(data extract - Great SW
Tourism Partnership COVID-19
Business Impact Survey)

Main type of business (%)



n = 1,086 & 189

Estimated amount of lost turnover Aug - Dec 2020 (%)

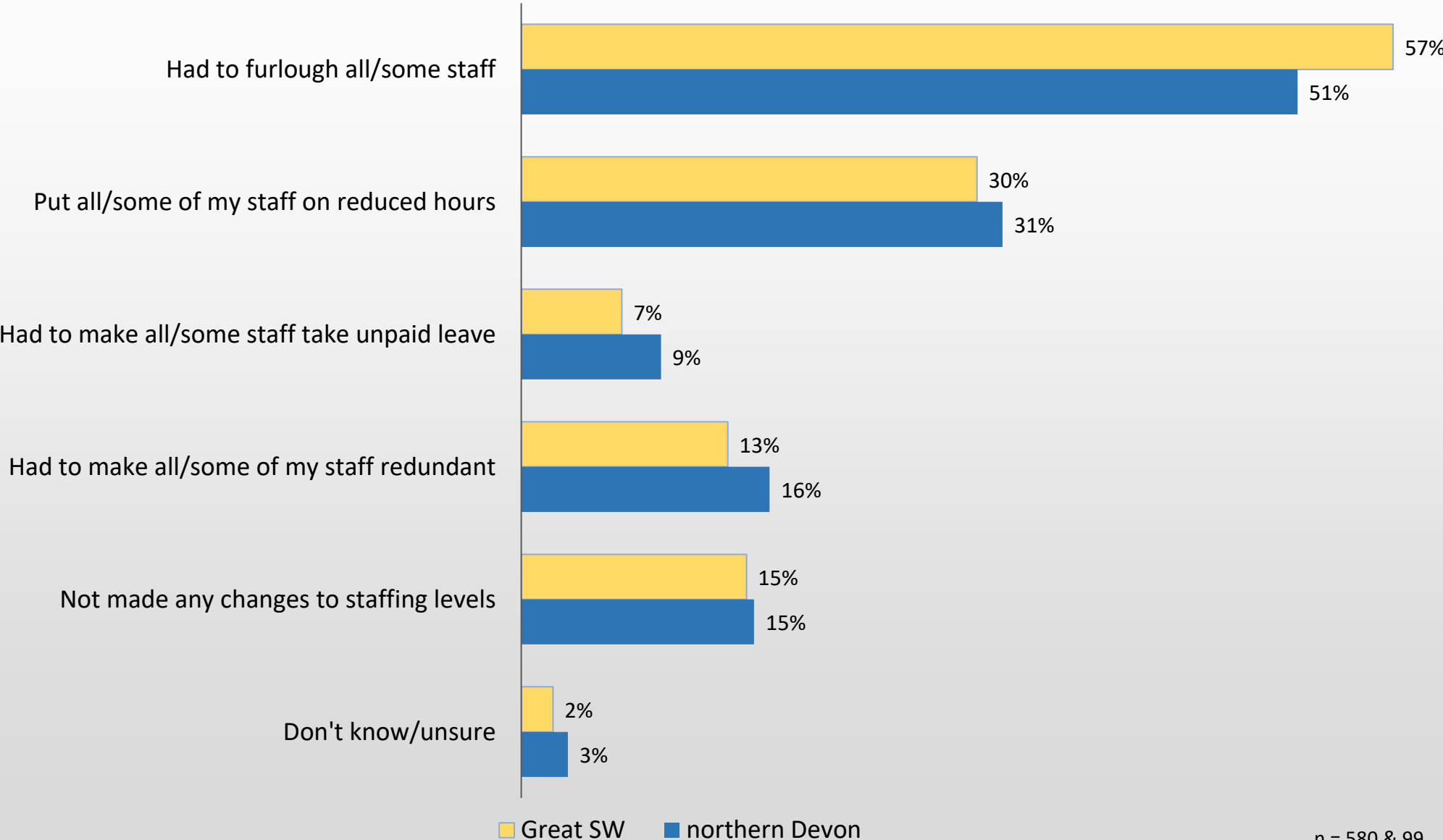


n = 892 & 151

Estimated turnover lost Aug – Dec 2020

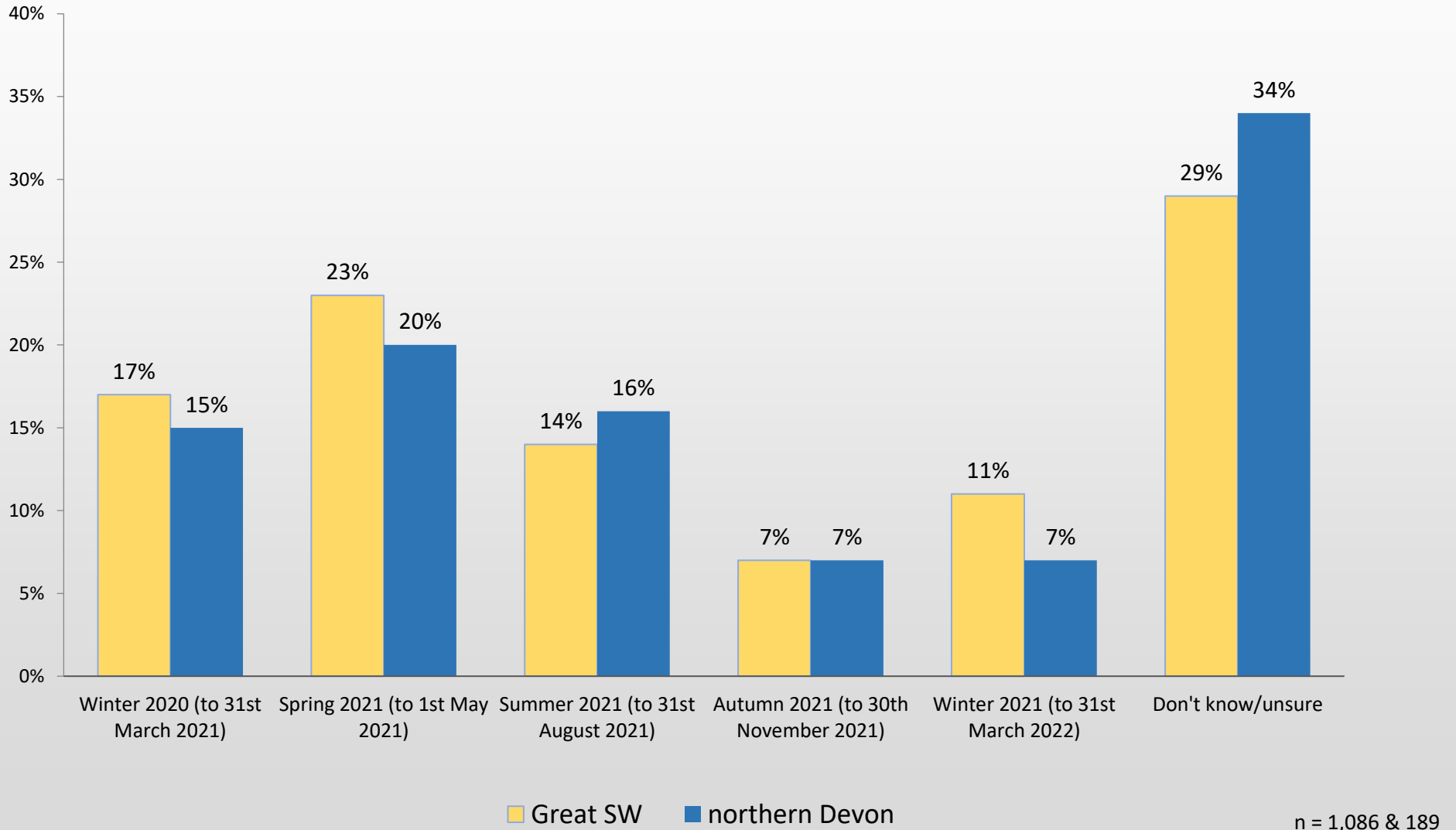
- Across northern Devon estimated loss of **£80.6 million** turnover (42% decrease)
- Additional supply chain spend lost **£23.1 million**
- For Jan – Jul 2020 period:
 - Estimated that Devon lost 57% of expected turnover (GSW 57%)
 - Plus supply chain spend

Impact of COVID-19 on staffing levels (employers only) (%)

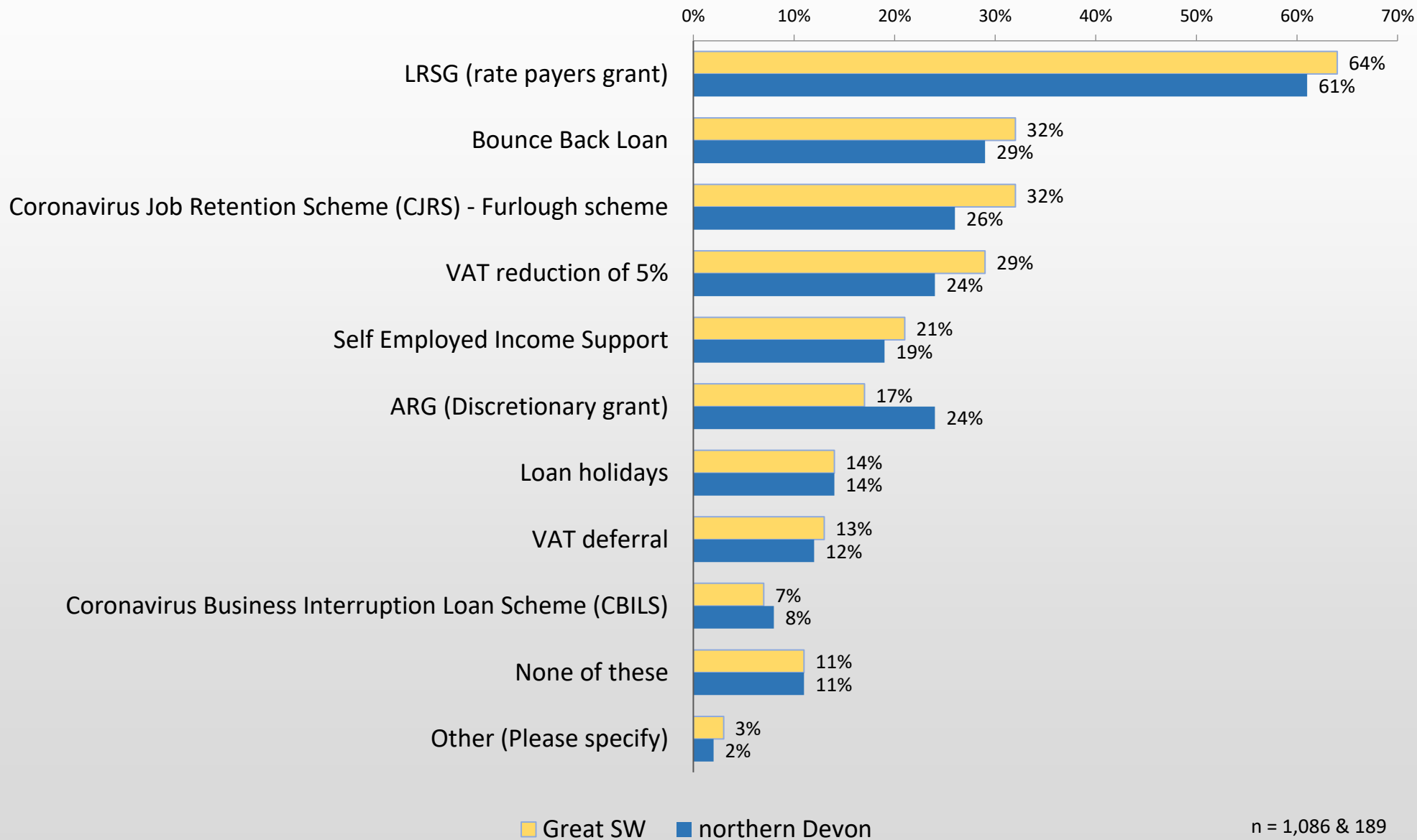


n = 580 & 99

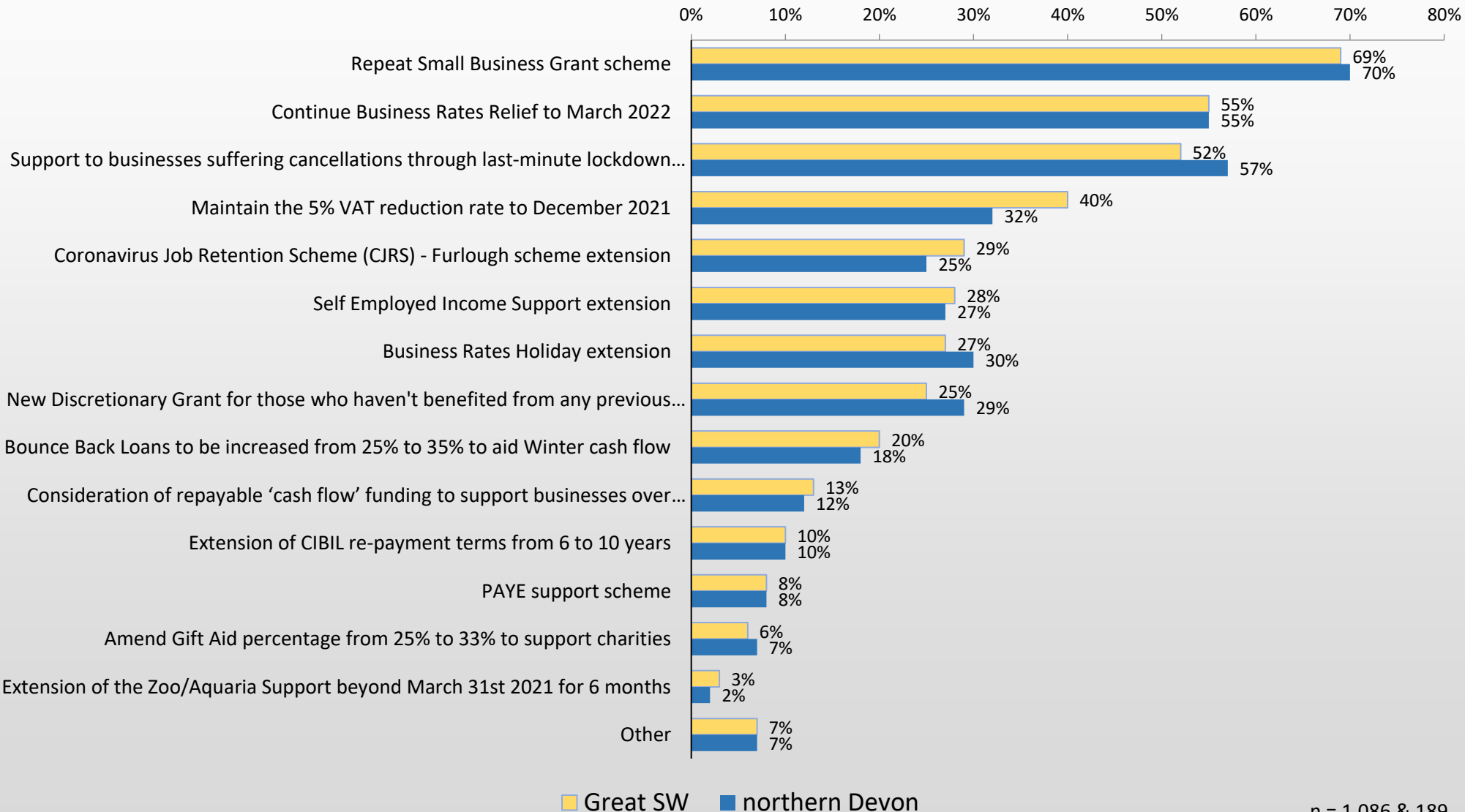
Which period is the furthest your business will be able to survive to without further support? (%)



Support schemes accessed Jul-Dec 2020 (%)

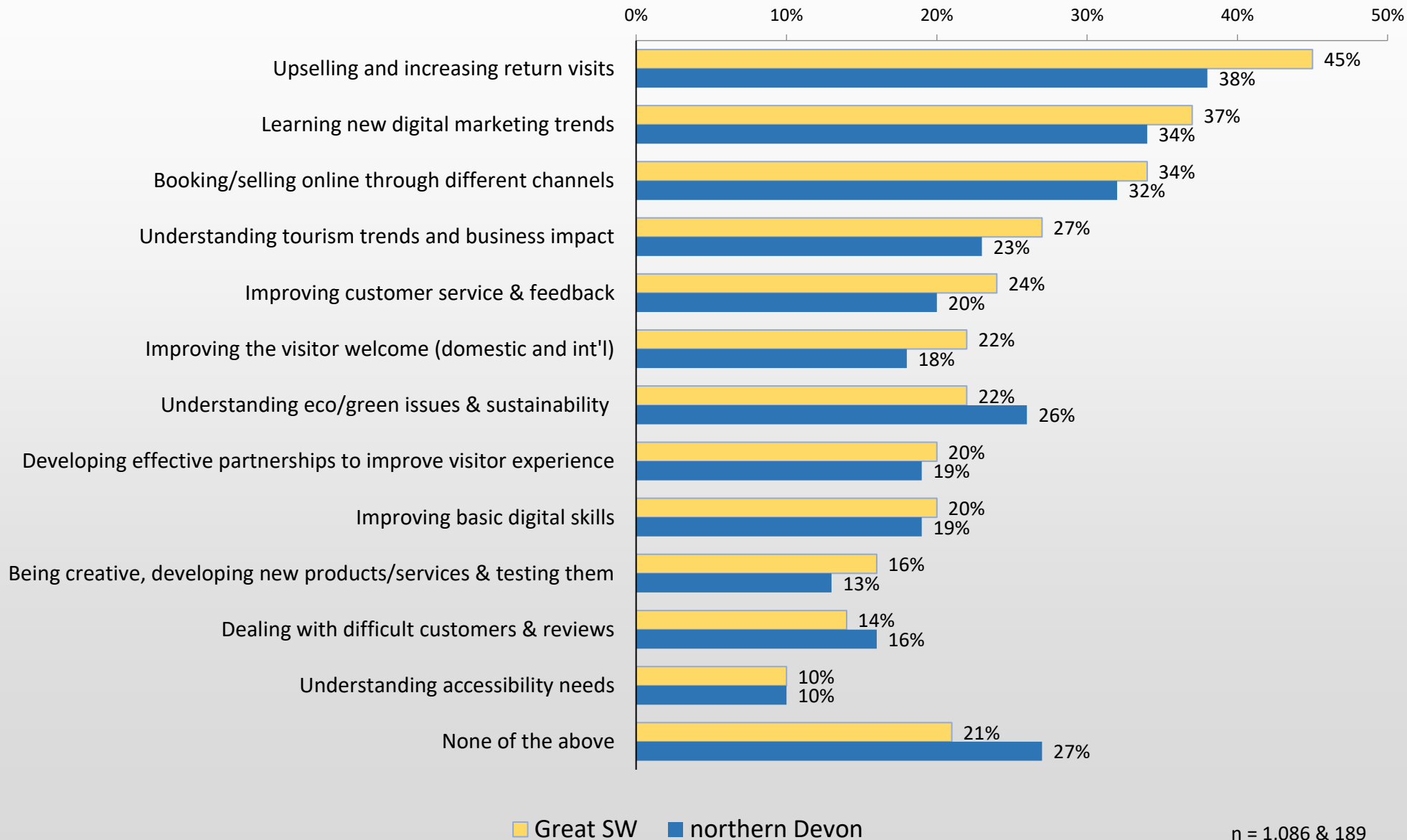


Top 5 priorities to help your business survive and grow in next 12 months? (%)



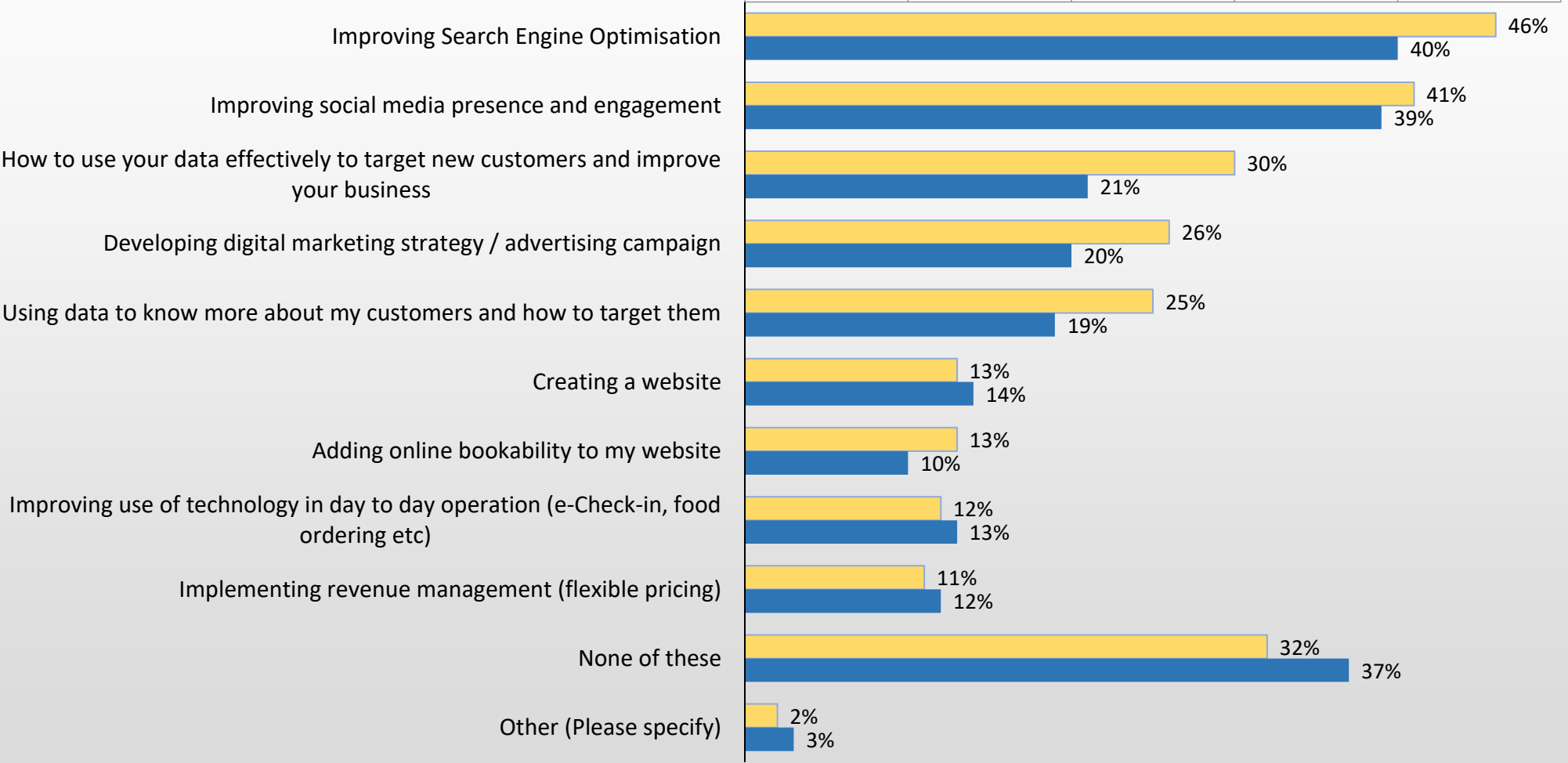
n = 1,086 & 189

Which areas of business support are of interest? (%)



What support do you need to improve your digital presence? (%)

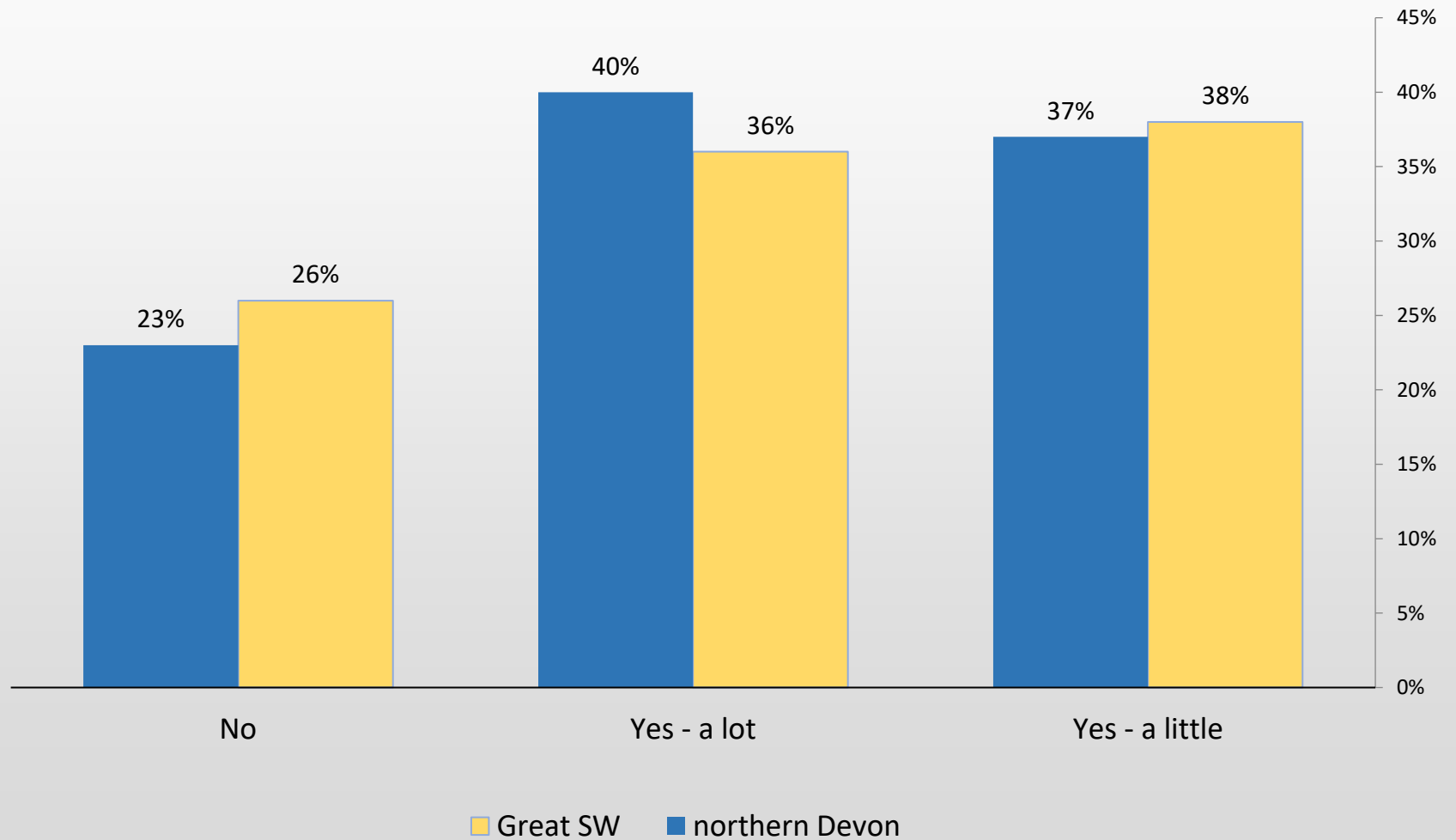
0% 10% 20% 30% 40% 50%



Great SW northern Devon

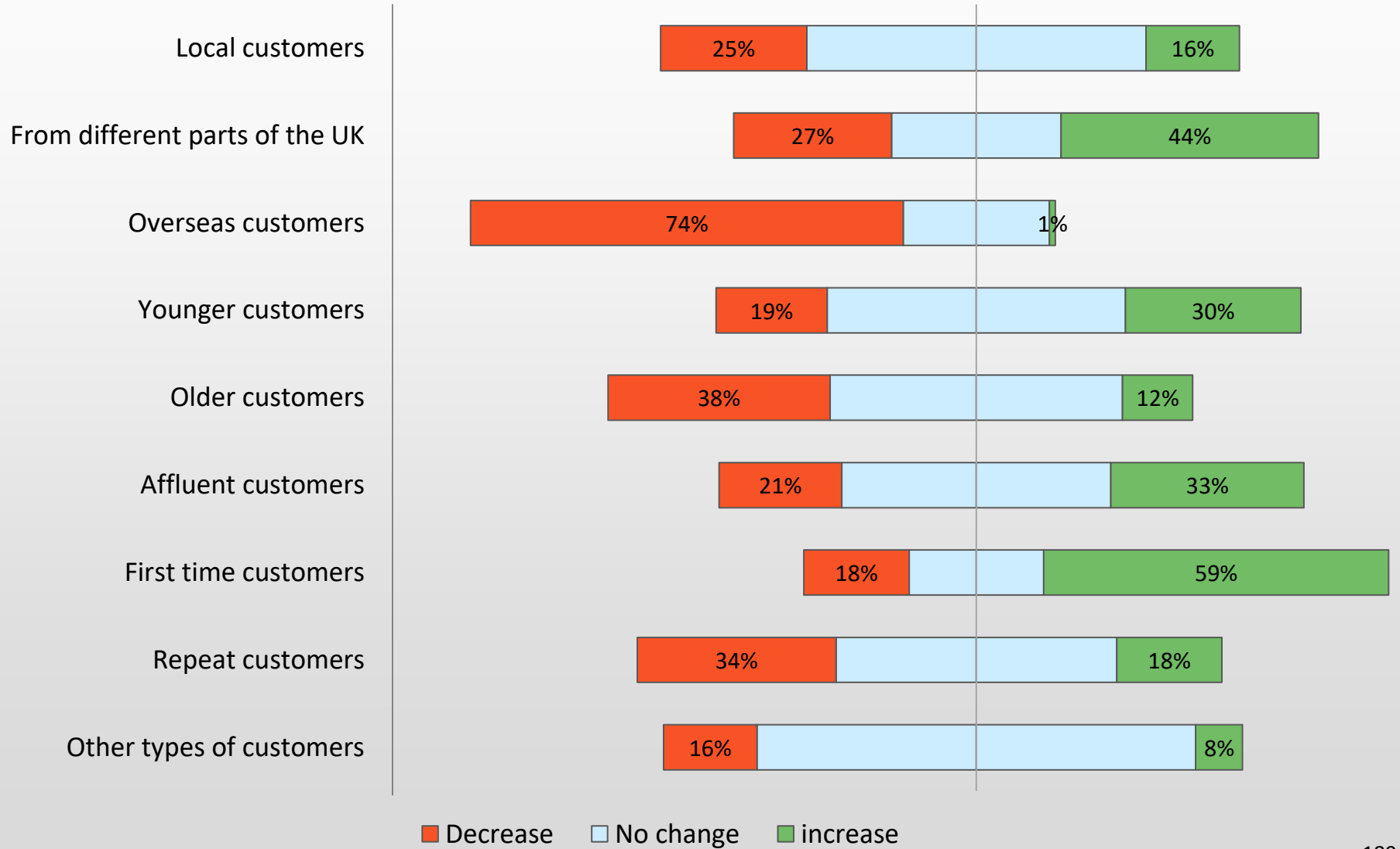
n = 1,086 & 189

Have you seen a change in your customer profile Jul-Dec 2020 compared to 2019? (%)



n = 1,086 & 189

What changes have you seen in customer profile?



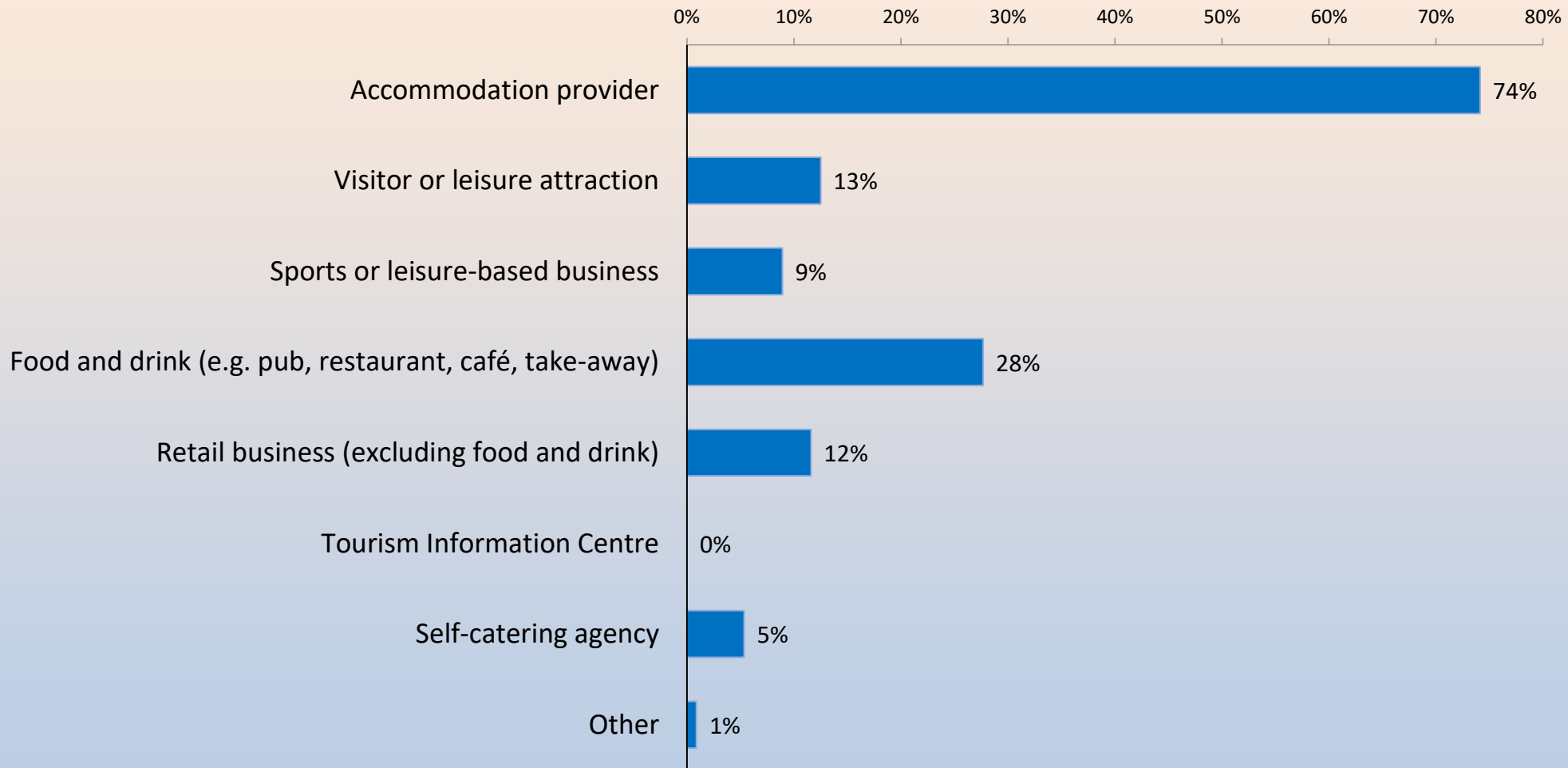
n = 189

2

Results of the telephone survey

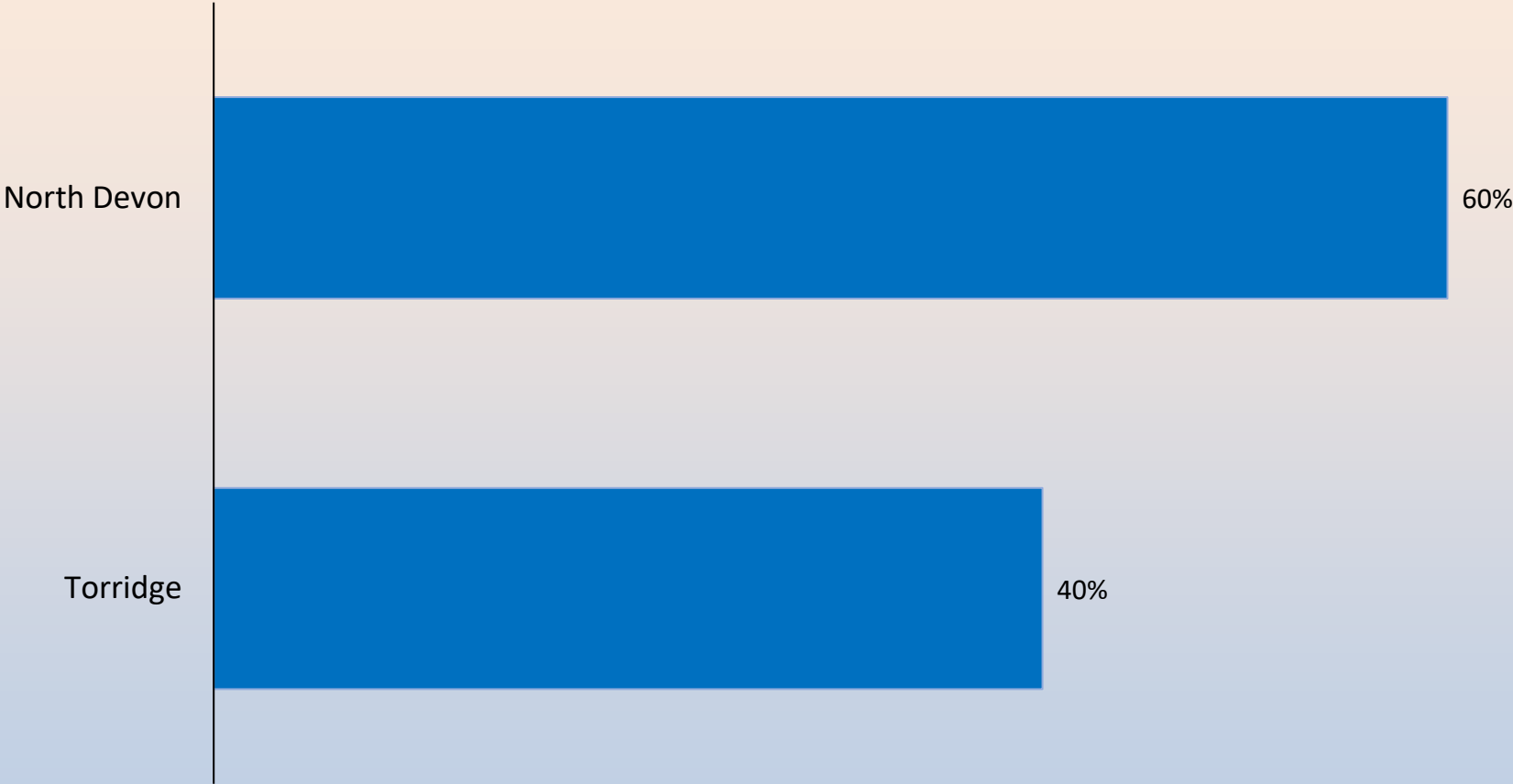
(Jan – Feb 2021)

Type of business (multiple options allowed) (%)



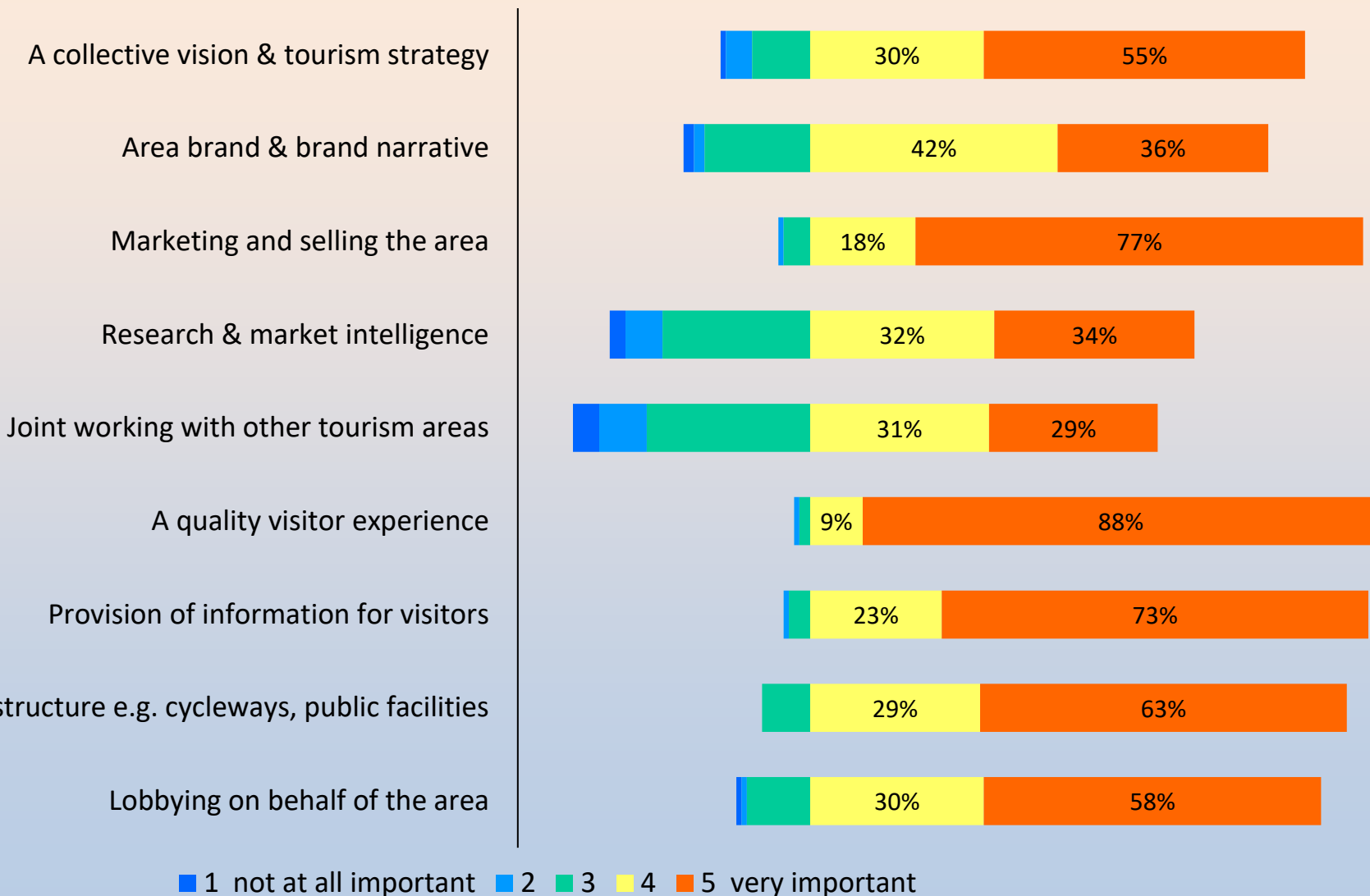
n = 112

Geographical spread - local authority area (%)



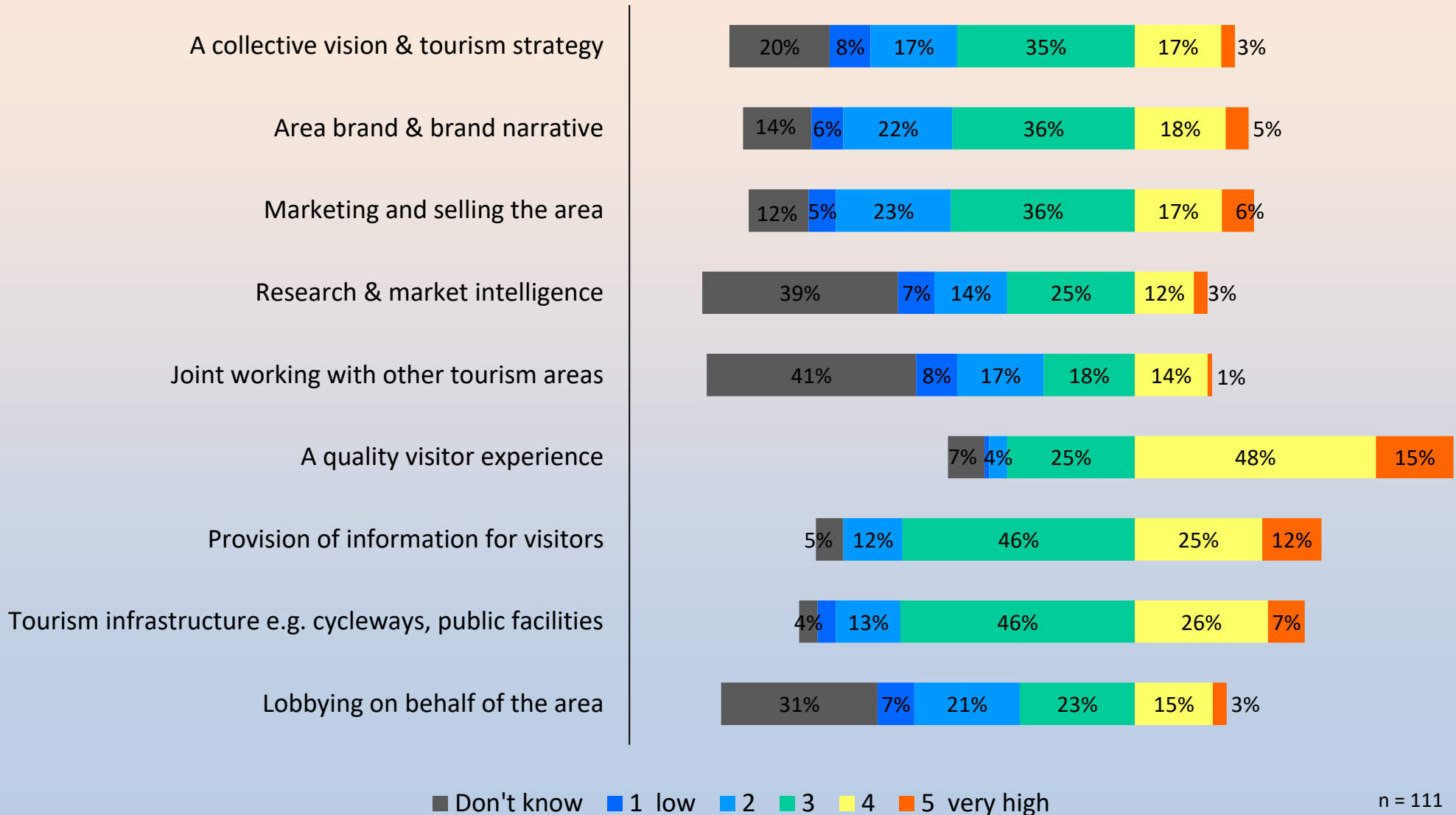
n = 112

How important are the following for the future of tourism? (rate from 1 to 5)

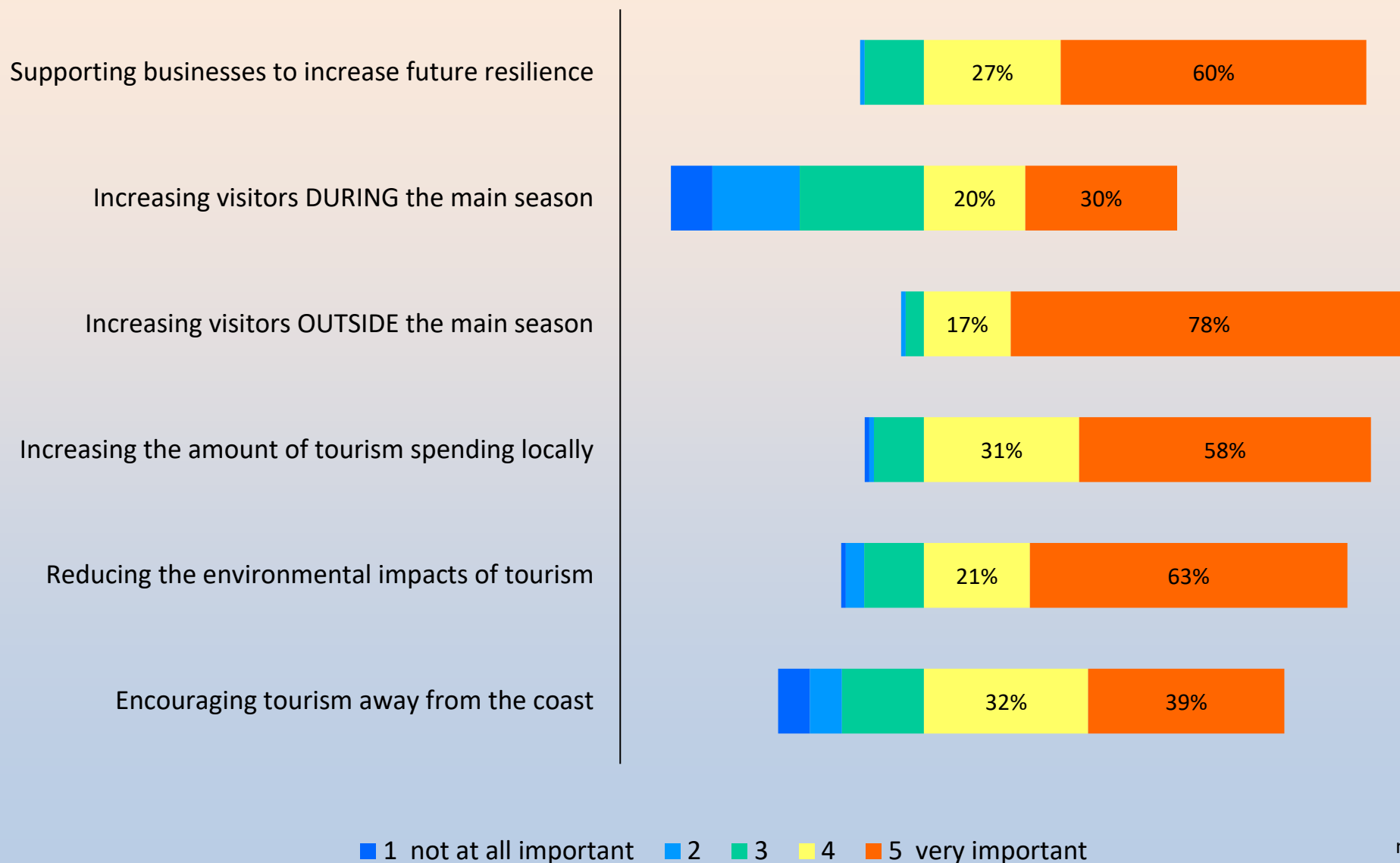


n = 111

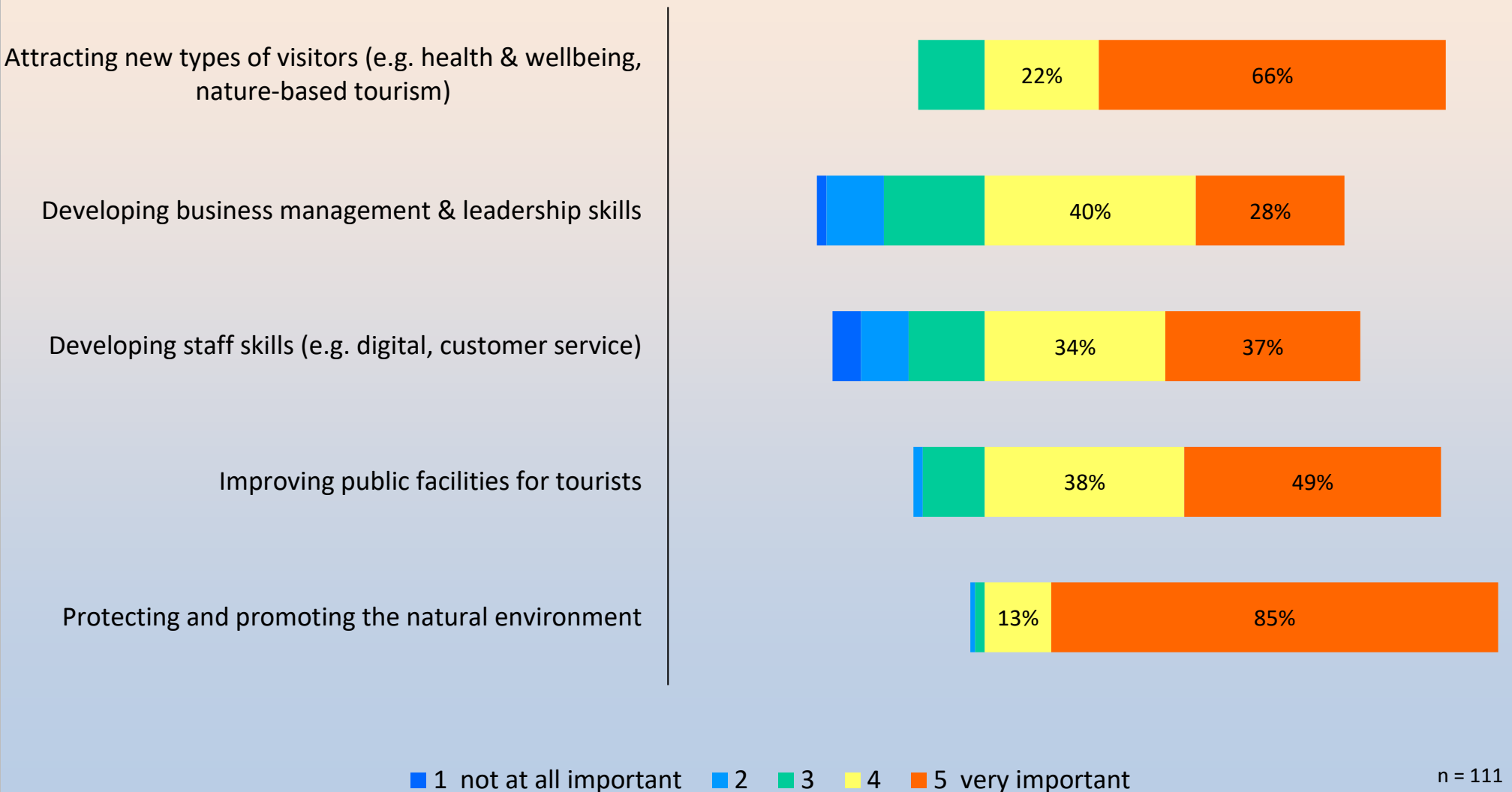
How would you rate northern Devon as a whole for the delivering the following? (rate from 1 to 5)



How important are the following priorities for tourism in northern Devon over the next 3 years? (rate from 1 to 5)



How important are the following priorities for tourism in northern Devon over the next 3 years? (rate from 1 to 5)



Additional priorities (1)

- Financial support for the sector – VAT, Bus Rates, grants
- Managing tourism alongside COVID-19
 - “Residents are very worried about increased COVID risk from visitors and international visitors. We need to be very sensitive about that”*
- Making the most of the ‘staycation effect’
 - “This year is going to be a staycation year. It is the year after that that is going to be hard. Need to focus on that”*
- Responding to changing visitors
 - “There is a changing demographic - we are seeing more and more younger visitors”*
- Other infrastructure – roads, rail, energy, Broadband
 - “North Devon doesn't have the infrastructure to cope with everybody holidaying at home... some places will be grid-locked”*
 - “Visitors are going to come down to Devon and Somerset, but will struggle to charge their cars here”*
- Planning

Additional priorities (2)

- Enhancing the appearance of the area

“North Devon is sadly full of ghost towns. They look so shabby... There is not enough investment in the local economy”

- Visitor education

“There is a need to increase public understanding of what the area is - some visitors seem to regard it as a glorified theme park and are confused to find that things haven't been laid on for them”

- Getting the balance right

“We need to be careful not to attract so many new visitors that it detracts from the appeal to our existing visitors – we need to get the balance right”

- Promoting the whole area

“We fall from the wayside down here. We are not included properly...The focus is on Barnstaple, Bideford, Ilfracombe, Woolacombe. Where's Holsworthy?”

- Other market opportunities

“Promoting the natural beauty and the kind of tourism we are good at - walking, outdoors, surfing rather than trying to compete with South Devon for attractions”

Additional priorities (3)

- More joint working

“North Devon has got so much to offer, but businesses seem so insular. They don't want to work together. They think they are always in competition”

- Joined-up thinking

“We should have a special committee that represents the area that comes together... We need something or somebody in charge of all this and brings it all together”

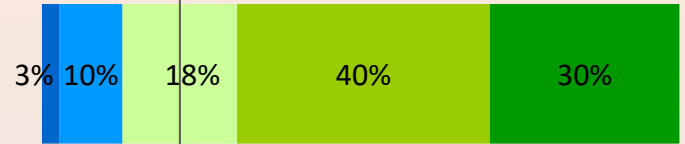
- Leadership

“If people could agree on a way forward, that would be the first step. There are too many people with different agendas. We need a figurehead, somebody that will drive it forward, someone that can get everybody to jump behind them and follow them... We need leadership”

“Personally, I feel that the national Tourist Board and most other similar organisations are a waste of space. Can't think of one I respect. Money is spent on expensive salaries and expenses instead of where it should be”

To what extent do you agree with the following statements? (1)

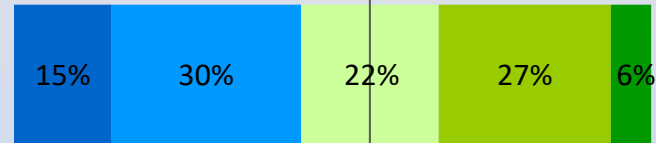
I am confident my business will recover within 12 mths



I am confident my business will recover within 3 yrs



I struggle to keep up-to-date with the latest tourism news/trends

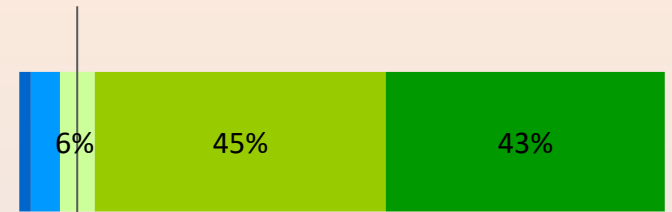


■ Neither agree nor disagree
 ■ Disagree
 ■ Strongly disagree
 ■ Agree
 ■ Strongly agree

n = 111

To what extent do you agree with the following statements? (2)

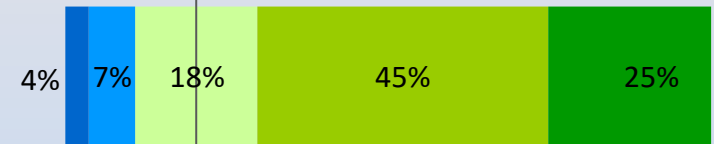
There is great potential to develop new tourism opportunities in northern Devon in the future



It is important that we work together to develop tourism opportunities in northern Devon



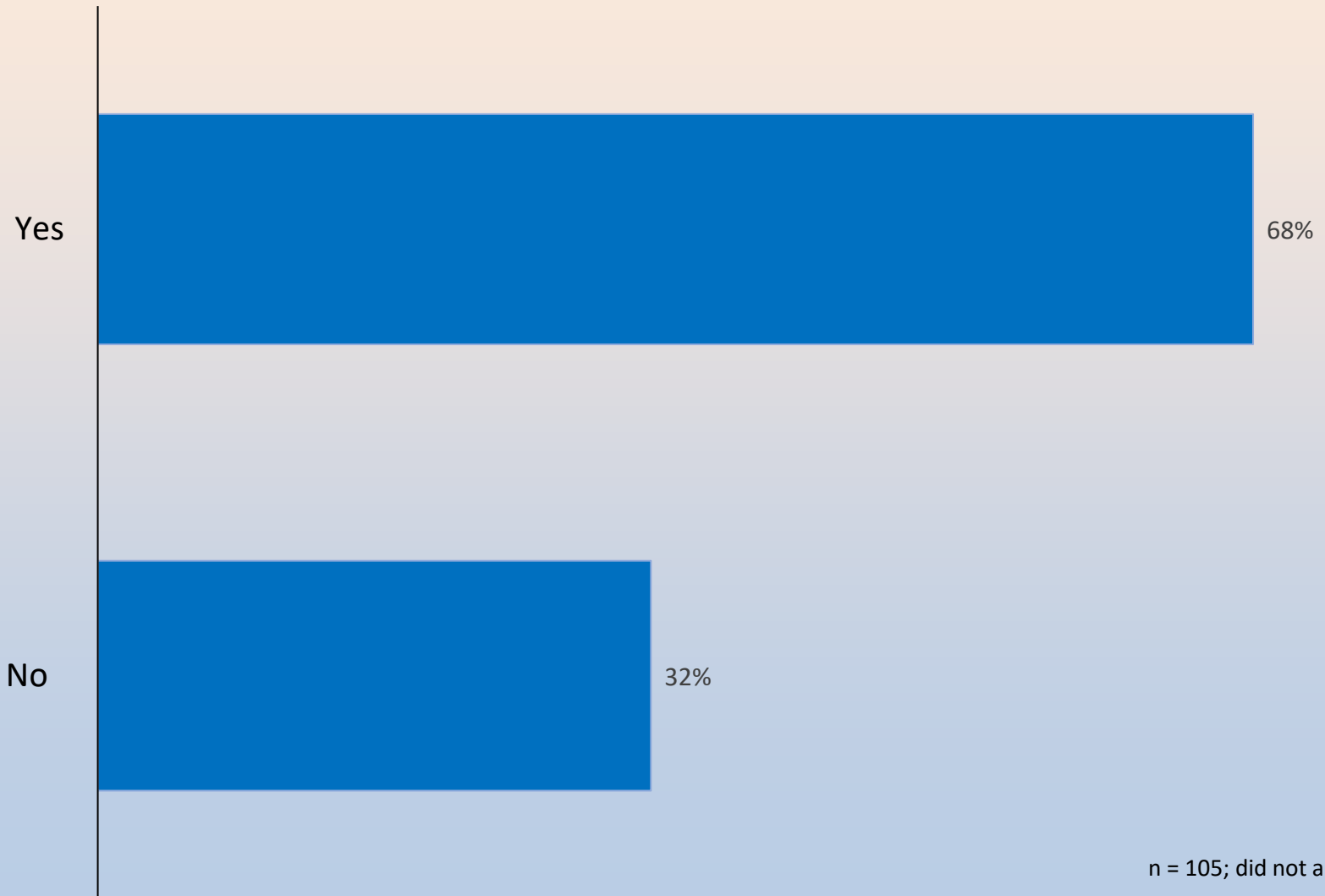
I want to be involved in how tourism develops in the area



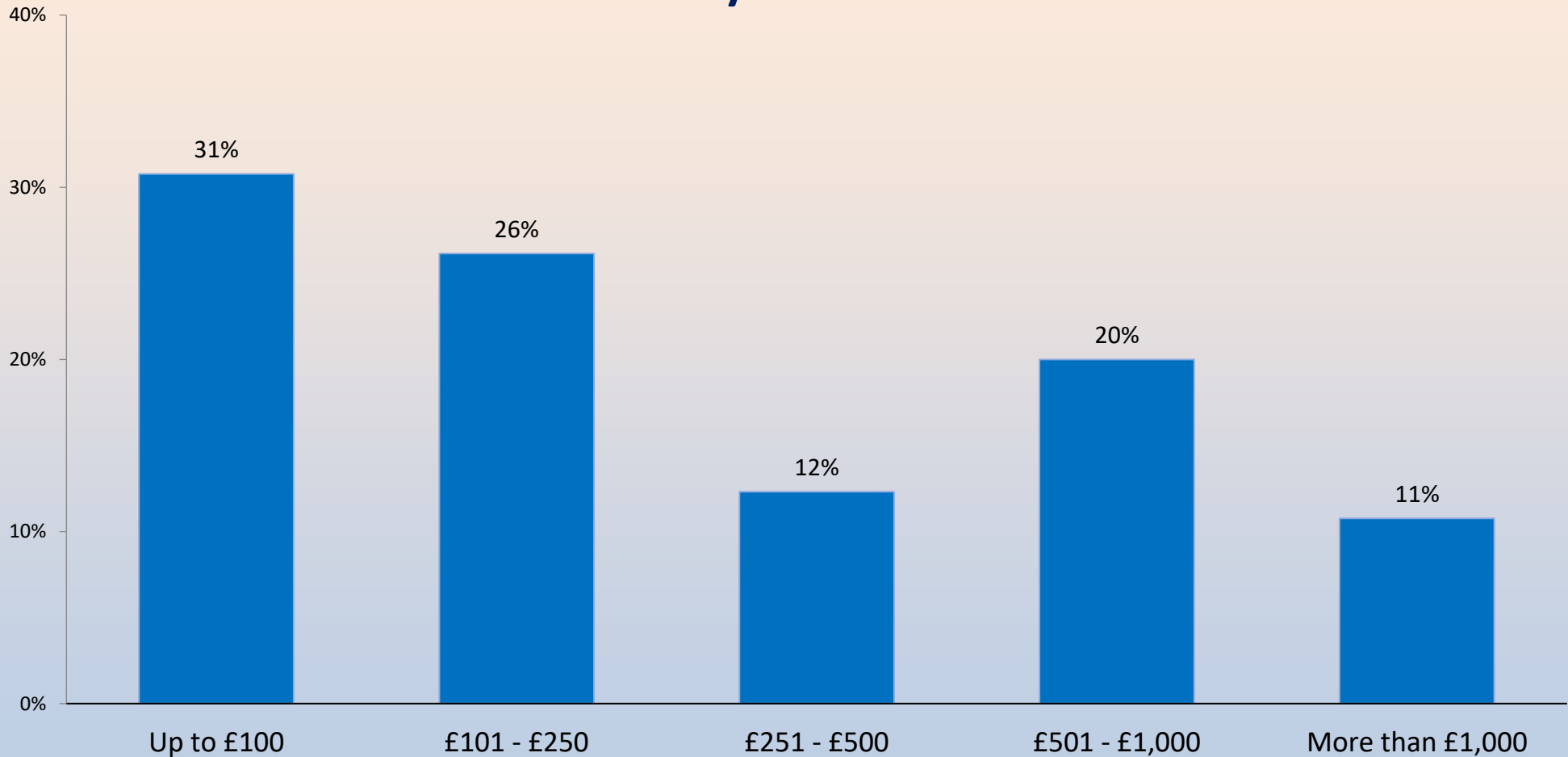
■ Neither agree nor disagree ■ Disagree ■ Strongly disagree ■ Agree ■ Strongly agree

n = 111

Under 'normal circumstances' would you be prepared to contribute financially to collective activities that develop tourism in northern Devon?



If yes, how much would you be prepared to contribute per year?



n = 65

3

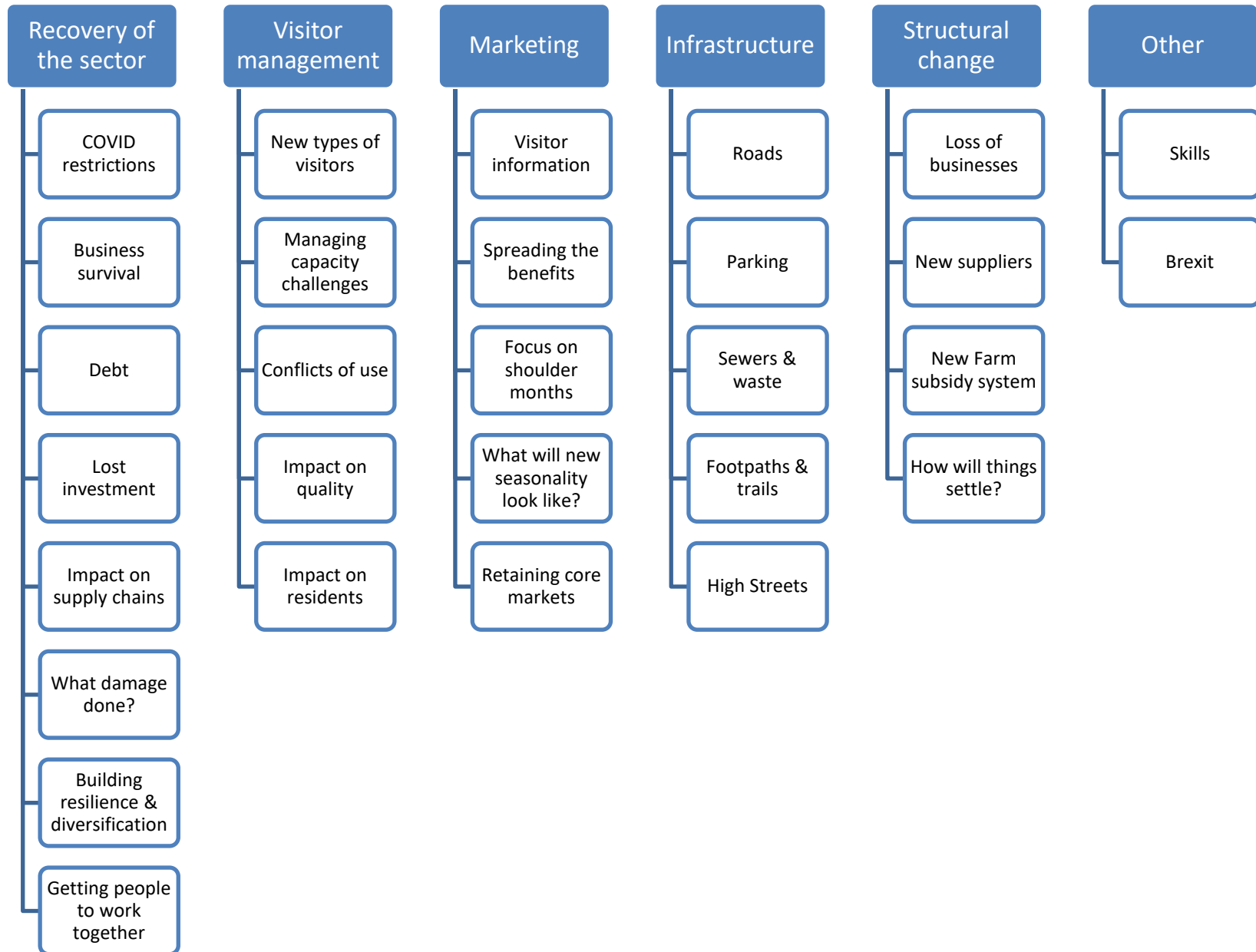
Results of the stakeholder interviews

(24 interviews)

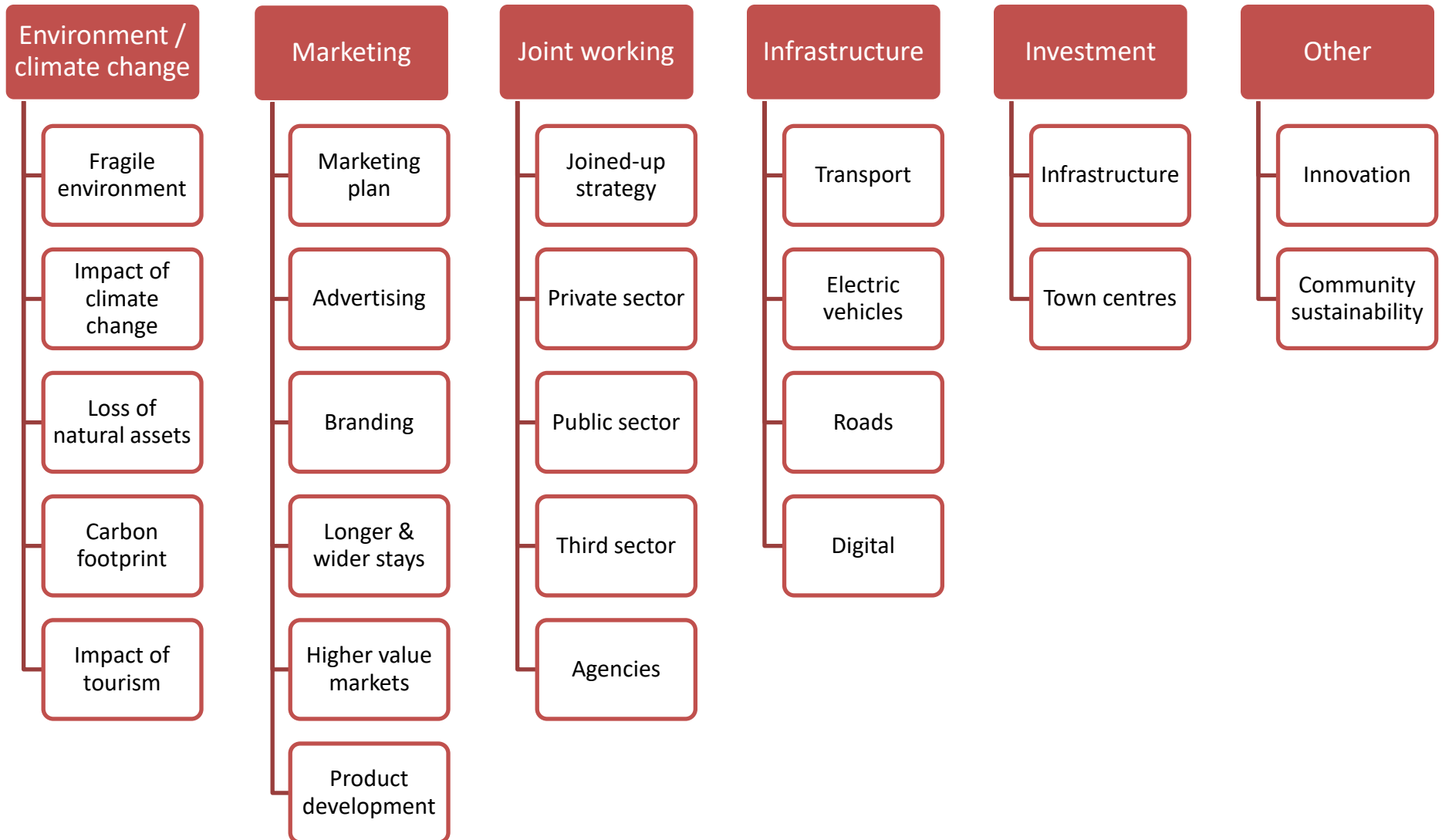
Organisations interviewed

Barnstaple Town Centre Management Bideford Bay
Chamber of Commerce Bideford Town Council Christie
Devon Estates Clovelly Estate Combe Martin Business
Association Combe Martin Coastal Community Team
Devon Wildlife Trust Exmoor National Park Authority
Federation of Small Businesses Hartland Peninsula
Association Holsworthy Town Council Ilfracombe Town
Council Lynton & Lynmouth Town Council National
Farmers Union National Trust North Devon Coast
AONB North Devon Biosphere Reserve North Devon
Council North Devon Marketing Bureau Parkin Estates
Plastic Free North Devon Torridge District Council Visit
Devon

Short-term challenges (next 3 years)



Long-term challenges (beyond 3 years)



Main opportunities for developing tourism? (1)

Staycation effect - a 'golden opportunity'	<ul style="list-style-type: none"> • Maximising and prolonging the staycation effect • Short-term window to engage with new audiences, particularly younger markets • Changing holiday behaviour • Encourage return visits
Retaining core visitors	<ul style="list-style-type: none"> • Encouraging returns • International, older visitors, families
Maximising value	<ul style="list-style-type: none"> • Extending the season – year-round activities • Encouraging longer stays • Spreading visits to under-visited areas
Experiential tourism	<ul style="list-style-type: none"> • The things that make northern Devon special/unique • Added value experiences – coach parties, families, small groups
Nature-based tourism	<ul style="list-style-type: none"> • Opportunities to see and experience landscapes and wildlife • Attraction of the AONB and Biosphere Reserve
Adventure tourism	<ul style="list-style-type: none"> • Walking, kayaking, coasteering, mountain biking, electric biking, watersports

Main opportunities for developing tourism? (2)

Sustainable tourism	<ul style="list-style-type: none"> • Green tourism markets • Low impact holidays
Heritage and culture	<ul style="list-style-type: none"> • Unique and distinctive experiences
Bespoke packages	<ul style="list-style-type: none"> • Joined up experiences – accommodation, food & drink, activities (collective working) • Packages that appeal to a wider demographic
Leveraging new infrastructure	<ul style="list-style-type: none"> • An improved Link Road
Other markets & opportunities	<ul style="list-style-type: none"> • Dog and pets • Events • Sports tourism • G7 Summit visits • Developing the evening economy
Business transformation	<ul style="list-style-type: none"> • Help businesses to diversify and develop online trading • Develop year-round trading mechanisms and strategies
Co-operation and joint working	<ul style="list-style-type: none"> • Supporting businesses to work together • Cross-border working with other areas

How good are we in working together to make the most of the opportunities?

“Bloody awful. The left hand doesn’t know what the right hand is doing. People jealously guard their little patch. We should be all working together...”

“Absolutely crap! Ideas are blocked quickly... I don’t think we work well at all together”

“There are lots of synergies, but we just don’t do it.. there is an opportunity to break down silos”

“Not particularly well” “Bloody useless!” “Not great” “At the moment, not very well”

“Not great. As an area we are not particularly joined up”

“We are poor at promoting and building on what we have”

“We are not great at working together. There needs to be more of a culture of working together”

“Rubbish! much of what is here is down to individual businesses, driven by individuals”

“Not sure we always have been. Cornwall always seem to be that step ahead of us”

“On the whole, not very good. Our psyche is locking into old paradigms. How do we break out of that mindset?”

“Not very good at all – not co-ordinated, little collaboration, fractured, ego-centric – it needs one organisation promoting north Devon, probably North Devon+”

“Poor to average. It is difficult to see how we have benefitted from being represented as an area”

“Tourism in north Devon is not co-ordinated in a strategic way”

What are the barriers to making the most of the opportunities? (1)

- Fragmented

“I think that we have a lot of fragmented views in the market. It is not joined up. We do not speak with one voice”

“Mixed pockets of success and some areas where it leaves a lot to be desired”
- Uncoordinated

“Not one voice, one strategy, everyone pulling together”

“Lack of co-ordination – to have one body that can bring those voices together is missing”
- Leadership

“There needs to be someone driving this forward with a remit to make things happen”

“There has not been a credible sense of leadership with a clear plan for the tourism sector. There has never been anything for everyone to get behind”

What are the barriers to making the most of the opportunities? (2)

- Marketing & promotion
 - “The coast is amazing... but the wider area is not promoted as well as it could be”*
 - “It is not promoted well enough in Devon let alone nationally”*
- Money / investment
 - “We have to invest in the right things, like for when the weather isn’t great – the things to do are outdoors”*
 - “Unless firms invest or we make it easy for them to invest, then the Councils need to do it”*
 - “Local authorities are strapped for cash”*
- Planning
 - “Some businesses struggle in getting Planning Permission”*

What are the barriers to making the most of the opportunities? (3)

- Business apathy /understanding *“The general feeling of apathy amongst businesses, negativity, fed up through hopes being raised and dashed”*
“The lack of appreciation that an area... needs marketing well so they can benefit from that larger marketing spend...”
- Political attitudes *“Torridge and North Devon are missing such a trick. Tourism is so important ... it reach[es] into so many different places”*
“The councils are so hands off – we have so few large tourism businesses. They can’t carry it”
- Critical mass *“We have a relatively strong brand profile, but don’t have the critical mass of businesses to support it... [other areas are] bankrolled by bigger outfits with time and money to invest into it with professional marketing teams... We may need to rethink the model of private sector standing on its own two feet”*

What should the priorities be for the next 5 years? (1)

Business support

- Safeguarding the businesses we have
- Debt management
- Business advice, greening, for growth

Collaboration

- Bring public and private stakeholders together
- People responsible for the product and promotion

Leadership

- Dedicated and experienced leadership
- A consistent voice, someone to inspire and get behind
- Strategic capacity – co-ordinate information/messaging

Destination marketing

- Increase profile
- Sell the area
- Respond to challenges and opportunities, short/long term

Joined-up strategy

- To boost tourism, wealth, sustainability
- Collaborative plan – long-term direction

Infrastructure

- Transport – road, rail, car parks, electric vehicles
- Digital (Broadband, mobile)
- Tourism infrastructure

What should the priorities be for the next 5 years? (2)

Investment

- Public realm
- Tourism infrastructure
- Regeneration projects
- Planning

Climate change & sustainability

- Protecting the natural environment
- Responding to climate change – mitigation/adaptation
- Become *The* environmental destination in the UK

Developing new markets

- Around key strengths and opportunities
- Culture, heritage, natural environment, unique experiences

Skills and training

- Key skills
- Long-term careers

Budget

- To get things done
- Business grants and incentives for businesses

Are you willing to work collaboratively in taking this forward?

“Of course” “Yes, massively”

“It is the only way we can go forward”

“Yes” “Absolutely, in spirit 100% there!” “Yes” “Absolutely!”

“Definitely”

“Absolutely... we are desperate to get behind this”

“This is interesting - please keep me informed” “Definitely!”

“Yes” “Absolutely – more collaborative working would help”

*“Yes, it is a must - we have to do that if we want to move
tourism forward” “Yes!”*

*“Absolutely, it is all our interests - it has to be done together
otherwise it has no credibility”*

“Yes!” “Definitely!”

Conclusions (1)

- Three pieces of research have examined different perspectives of the crisis and key priorities for recovery
- Tourism has been badly hit by the pandemic and from the restrictions arising
- Short-term business priorities are around survival with a range of support needs – financial, marketing support, digital, resilience, including debt management
- Businesses place high importance on the range of destination management elements - not just marketing, though that is key
- Compared to rated importance, there is a performance gap across the range of destination management elements which presents a strategic agenda for action

Conclusions (2)

- There is strong support for collective action and, under ‘normal circumstances’, majority support for collective contributions, but with some caveats
- Stakeholders also see a range of broad challenges, barriers and priorities requiring collective action
- The pandemic has altered visitor behaviour and has thrown up new challenges and opportunities, at least in the short-term – a strong staycation effect is expected in 2021
- Stakeholders are universal in their support for more joined-up collaboration
- There is strong interest amongst businesses and stakeholders in moving forward together – undertaking this research has raised expectations