

NORTH DEVON TOURISM STRATEGY 2005 - 2015

# “Creating a World Class Industry in a World Class Environment”



May 2004

A TEN YEAR PLAN TO PROMOTE AND DEVELOP TOURISM IN NORTH DEVON



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# CREATING A WORLD CLASS INDUSTRY IN A WORLD CLASS ENVIRONMENT

## FOREWORD

In 2001, the Foot and Mouth crisis was a stark reminder of how important the environment is to the local economic and social structure. Within a year, a large area of North Devon was designated by UNESCO as a World Biosphere Reserve.

With these two diametrically opposed occurrences came the realisation of what an incredible and valuable asset surrounds us all in North Devon.

The tourism industry began and has survived over two centuries primarily because of the exceptional landscapes, coastal scenery and cultural distinctiveness of the area. It is now an undeniable bedrock of North Devon's economy. However, it is faced with many challenges if it is to make a fuller contribution to the economic, social and environmental well being of the area.

Global tourism is expanding exponentially but visitors are increasingly sophisticated, more demanding and receptive to more opportunities than ever before.

North Devon is on a world stage but it shouldn't be afraid to be so because it has a *world class environment* - that's official! However, it does need to ensure that all the factors that affect a visitors' experience are also of an equal standard.

This Strategy is about identifying sustainable growth in the short and long term. It will look at what needs to improve, who should be involved and how it should happen.

What will be fundamental in meeting the new challenges, and is something North Devon has done particularly well in recent years, is working in partnership.

Tourism is highly fragmented and very diverse in its makeup with both the public and private sectors playing key roles in delivering the visitor experience. Without partnership working any progress would be disjointed and erratic in its quality.

If North Devon is to achieve the highest standards in a consistent and effective manner then it has to be with public bodies, business and community working together in a way that will enhance and not diminish the high environmental standards we all enjoy.

I hope that the Strategy inspires not only more debate on how North Devon should develop but also the confidence that we can compete on the world stage.

### **MICHAEL MANT**

Chairman

North Devon Marketing Bureau

# INTRODUCTION

In 2001, the Foot and Mouth crisis wreaked havoc in rural economies throughout Britain. Although agriculture and rural businesses took the brunt of the disease it quickly became clear that it was the additional effect on the tourism industry that created the major economic losses. It also brought to the fore how closely tourism co-exists with the natural environment, how fragmented it is and was a stark reminder of its susceptibility to various external economic, environmental and social influences. Five years earlier in 1996, key members of the private sector and the two local authorities in the area - North Devon District Council and Torridge District Council - together attempted to create a greater synergy between the public and private sectors by forming the North Devon Marketing Bureau. This organisation broke new ground in the way local authorities and the private sector combined to harness European, public and private resources. It created not only a successful promotional vehicle for businesses but also implemented a product quality agenda.

This resulted in a surge in tourist nights in the area during the period 1996-1999 and an increase in market share of tourism in Devon. However, the following two years saw exceptional falls in nights caused by wet weather in 2000 and FMD in 2001. Remarkably, 2002 saw the area make a significant recovery to 1999 levels and overall, since 1996, the area has enjoyed, on average, an extra 1 million tourist nights each year.

The Marketing Bureau's European funding finished in March 2000 and, although the organisation still sustains both marketing and product development activities, it has reached a plateau with regard to support from the industry. It also tends to operate with limited reference to the other local agencies and without a long-term strategic view of how the industry should develop. The local authorities are also finding it increasingly difficult to fund non-statutory functions such as tourism, leisure, the arts and economic development although they invest continually into supporting infrastructure and environment.

Several strategic documents have been issued in recent years by the English Tourism Council, South West Tourism and, latterly, Devon County Council that are attempting to build an integrated plan from top to bottom. South West Tourism and the RDA have recently issued a new ten year plan 'Towards 2015' that sets the regional strategic objectives for tourism.

At the same time, the North Devon Economic Partnership is adopting a wider Economic Strategy in which tourism and the environment, especially the UNESCO Biosphere status, play a major role.

It is now time to establish a strategy specifically for the local development of tourism that can deal with the direct application of the national, regional and local policies and ensure that North Devon sustains and increases the levels of business enjoyed in 2002.

## The Vision is:

**“To develop a tourism industry in North Devon that provides a high quality visitor experience and tourism product, greater returns on investment and benefits for the local community in terms of a sustainable economy, amenity and environment”.**

### The aim of this document is to:

- Establish the state of the industry as at the year 2002. This includes a comprehensive trend analysis covering the period 1986-2002 that maps out the changes in accommodation stock, tourist nights, expenditure and visitor characteristics. There is also a brief overview of the competition in the marketplace and a market forecast.
- Give clear strategic direction for policy and activity to enable more 'joined up thinking'.
- Provide the basis for more effective partnerships between the public, private and voluntary sectors.
- Focus existing resources and act as a tool for attracting new resources from external agencies and inward investors.
- Agree and develop a better and stronger market position for North Devon.
- Identify ways that the industry can meet and exceed visitor expectations through quality standards, improved skills and researching customer needs.
- Create a better understanding of the nature and importance of the industry and the way it can benefit and integrate with the rest of the economy.

## Generic Outputs

### The strategy will reflect the aims of the SWT Regional Strategy and by 2015 aims:

- To achieve an average rate of tourist nights of 9 million per year (1996-2002 - 8.2 million nights).
- To achieve an average net annual growth in tourist expenditure from staying visitors of 1.5% pa (2002 - £255 million)
- To achieve a growth in total business turnover (Cambridge Model) of 15% to £592 million.
- To create a further 5% growth in employment
- To achieve and sustain a 30% market share of the nights in Devon County (Year 2002 - 24.9%).
- To increase the level of participation in NQAS for accommodation to 75% (Year 2002 - 26% across all sectors).
- To increase membership levels of NDMB to 75% of the accommodation sector (Year 2002 - 30%)

## Delivery of the Strategy

The Strategy identifies 64 Key Actions involving over 30 different agencies as well as the private sector. Hence, the successful delivery will depend on the Strategy being effectively co-ordinated.

No one body can deliver all the actions but it is proposed that the North Devon Marketing Bureau is in a unique position to play the necessary pivotal role in the next five years.

It will, by the nature of the subjects covered, be involved in direct delivery but on other occasions it will need to ensure that all relevant bodies pay due regard to the agreed actions and also to assist and prompt, where necessary, other actions that will be required on key issues.

More detailed Action Plans (probably 3 -5 Years) will need to be devised especially for the local authorities, where both capital and revenue investments will be key to both the promotional and product development issues raised by the Strategy.

These Action Plans and their integration with the main Strategy will need to be jointly monitored, evaluated and reviewed on an annual basis.

# TOURISM IN NORTH DEVON

## Importance of Tourism in North Devon

Since the late 19th century tourism has been a key factor in the economic development of North Devon and is, unlike many other traditional industries, continuing to grow worldwide. It plays a unique role in both the economic prosperity and the quality of life of the area. In particular, it can provide the following benefits:

### 1. Boosting the Local Economy

Tourism is a form of inward investment in that it attracts additional money into the local economy. The Cambridge Model estimates that it generates a total Business Turnover of £518 million in the area providing direct benefit to a wide range of local businesses and indirectly benefiting local residents. Tourism can also play a useful role in diversifying the economy of rural areas as well as regenerating urban areas. Environmental enhancements benefit the local economy through the employment of local businesses as well as acting as a valuable investment in the future of the areas natural capital.

### 2. Generating Employment

This visitor spending supports and creates jobs. The Cambridge Model estimates at least 14,000 jobs (20% of the workforce) are sustained through tourism expenditure of £518 million. It is estimated that there are over 1,400 businesses that directly operate in tourism either as accommodation, tourist attractions or activity providers. In addition, there are many other sectors that particularly rely on tourism e.g. retail, catering.

### 3. Creating a Positive Image

Tourism can help raise the awareness of places, change perceptions create interest and encourage inward investment and civic pride. A place that people want to visit is usually a good place in which to live and work.

### 4. Sustaining Local Facilities

Visitors can help support facilities that local people use, resulting in greater variety and a higher quality of provision. This can apply to theatres, cinemas, shops, museums, visitor attractions, beaches, golf courses and public transport. In rural areas it can help support post offices, pubs, doctor's surgeries and farms.

### 5. Supporting a Better Environment

Tourism thrives in attractive environments. Visitor related uses can provide new life for rural and coastal communities. Historic buildings and tourism developments can be the catalyst for the regeneration of derelict sites. The perceived importance of tourism by the local communities can encourage an attitude of environmental awareness and respect.

## The Negative Impacts of Tourism

**Tourism can also have undesirable consequences on the economy and the environment:**

1. It is perceived as a low wage, low skill seasonal industry.
2. The influx of visitors especially at peak times can create a strain on the infrastructure particularly with regard to traffic congestion.

3. Pressure from new developments on the environment and local communities especially in coastal areas.
4. In recent years, the purchase of properties for second homes and holiday accommodation has been a contributing factor in a shortage of affordable local homes and, in some villages, a lack of resident population.

## The Economic Impact of Tourism

The tourism industry comprises many different levels and many different sizes and types of businesses. It is also typified by 'lifestyle' enterprises where the successful operation of the business is not the sole determining reason for the existence of the operation.

**The economic benefit accruing from the industry can be generated in a number of ways:**

- Direct expenditure by staying and day visitors in accommodation, attractions, activities and other services in the area. Allied to this is the expenditure by residents when hosting visiting friends and relations (VFR) in the area.
- Expenditure by tourism or other related sectors on services and supplies required for the day-to-day running of the business.
- Wages and salaries paid to employees in the tourism or related sectors that are then spent in the local area.
- Capital expenditure by tourism or related sectors on new build.
- Refurbishments or developments that are spent with local suppliers and services.
- Public sector investment in new facilities that provide services for tourists but use local suppliers or services.

Except for the first category, all of the above is are part of the multiplier effect of tourism. It is considered that because many of the tourism businesses are locally owned it is estimated that the multiplier effect is considerable when compared to other sectors within the economy. However, the nature of this multiplier effect is so complex that it has been difficult to estimate its true value and, hence, what the real impact of the tourism sector is on the GDP of the area.

Recently, South West Tourism has commissioned the **Cambridge Model** in the region giving comprehensive district level figures on the wider impact of tourism.

The first set of results based on data for 2001 show that there was total tourism expenditure of £454 million for North Devon and business turnover of £518 million. This includes estimates of expenditure by both staying and day visitors on accommodation, attractions, retail, catering and transport. It reveals that expenditure on retail and catering are both **larger** than that on accommodation or attractions:

% TOTAL EXPENDITURE	
Catering	34%
Retail	21%
Accommodation	18%
Transport	13%
Attractions	11%

However, it still omits the spin offs from capital investment by tourism sectors.

Traditionally, employment in tourism has been perceived as low wage, poor quality and largely seasonal. However, there are examples within recent years of attempts by the industry to improve the skill and wage levels in order to overcome the recruitment and retention problems that employers have experienced. The development of longer periods of opening and better all year occupancy have also required employers to establish more permanent staff positions. In parallel, formal workplace development programmes have been initiated by North Devon College in hospitality and catering which are also addressing some of the issues with the larger employers.

Subsequently, employment conditions may not only have improved but could also be better than other sectors in the economy but more research is required on this issue. Allied to this is the high numbers of self employed that work in tourism - relatively little is known about the affluence or otherwise of these operators.

The Devon Group of Economic Development Officers have commissioned work by Owen Nankeville on GDP trends across all sectors of the economy. These different sets of economic data are yet to be integrated with the Cambridge Model to establish a definitive and credible analysis.

## The Tourism Assets

There are a multitude of reasons why tourists first come to an area and, indeed, why they choose to come back. Key in this is the character and image that is projected of the area and then, ultimately, the quality of the resource and the visitor experience.

North Devon is one of the few areas in the UK to have a formal **Cultural Strategy**. This sets out a clear vision for the place of culture in support of local economic and community life and in enhancing the attractiveness of the area to visitors and investors. Increasingly tourism is expected to be driven by leisure activity opportunities rather than by accommodation. Hence, there is expected to be a growing role in the local economy for providers of cultural opportunities. The Strategy defines cultural activity as sport or recreation, theatre and cinema, art galleries and museums or simply enjoying the quiet attractions of the coast and countryside.

**The Table in APPENDIX A shows specific details of the main tourism assets. In summary, the main natural, built and cultural resources include:**

**The Natural and Built Environment** - The landscape that is encompassed within the coast, countryside and National Park areas of North Devon is **the** major tourism asset. Most of the coastline is of national or international importance. Inland, about a third of the National Park is within North Devon's boundary and the lush rolling hills, culm grasslands and river valleys of the rest of the area extol the view of a traditional Devon landscape.

The National Trust owns and protects large areas of the coast as well as land at Arlington. The CPRE (1997) designated North Devon as one of only three areas in England that could be classified as 'tranquil'. More recently, UNESCO granted World Biosphere status to the area surrounding Braunton Burrows and the Taw Torridge estuary.

**Tourist Attractions** - there is a very diverse mix of paid entry attractions catering for all kinds of visitor types. All of the attractions reflect, in one way or another, the local distinctiveness of North Devon whether it be the environment industry, arts, crafts or heritage. Many of them are owned and operated by local families.

**Outdoor Activities** - Increasing numbers of visitors come to the area to specifically take part in an outdoor activity of some kind or enjoy it as part of the holiday experience. The beaches in North Devon have long been one of the most important attractions in getting visitors to the area. Two of them have been awarded Blue Flags on a regular basis whilst others have received Seaside Awards.

**Events, Festivals, Arts and Crafts** - North Devon has a rich diversity of events that, on the whole, are locally distinctive and some of which have grown to be of regional, if not national, importance. In recent years the North Devon Festival has established itself as the major event in the calendar. A recent survey estimated there were over 200 businesses in the area that trade in arts and crafts with a strong presence in Appledore and Bideford as well as major commercial organisations such as Dartington Crystal and Brannams Pottery. North Devon towns and villages have been particularly successful in the Britain in Bloom competitions with Barnstaple obtaining awards at both European and World levels.

**Retail, Catering and Leisure Facilities** - There are a range of other facilities that visitors can enjoy in the area. North Devon is particularly strong in traditional shopping with a number of Pannier Markets and, more recently, Farmers Markets. Modern shopping provision is also available in the larger towns and the new factory outlet at Atlantic Village has proved popular with visitors. Because of the high level of self-catering provision in North Devon pubs, cafes and restaurants are also extremely important. The main resorts also contain amusement arcades, mini golf, parks, swimming pools and leisure centres which all add to the visitor experience.

# TOURISM TREND ANALYSIS 1986 - 2002

The Trend Analysis sets out to identify the changes that have occurred in the staying visitor market over the period 1986-2002. The year 2002 will be used as the base year against which the progress of the Tourism Strategy will ultimately be judged.

**The full analysis of North Devon data is shown in APPENDIX B**

## SUMMARY OF TOURISM TRENDS 1986 - 2002

**Accommodation Stock** - North Devon is one of the largest tourism destinations in the UK with regard to the volume of accommodation (53,000 bedspaces). It has a stock equivalent to major destinations such as Scarborough, Torbay and Newquay and more than twice that of such resorts as Bournemouth. However, in volume terms, there have been large falls of all stock in Ilfracombe and Westward Ho! although Woolacombe and Combe Martin also show high percentage falls in serviced accommodation.

**Tourist Nights** - Overall, falls in tourist nights during 2000 and 2001 were recouped in 2002 restoring an average annual number of tourist nights since 1996 of 8.2 million. The largest growth in tourist nights has been in Holiday Parks although Serviced Accommodation still generates the largest amount of income to the area.

**Visitor Expenditure** - The overnight stay and day tripper visitor expenditure calculations recently undertaken by SWT showing a value of over £454 million (Cambridge Model) to the area placing North Devon second in the Region behind Bristol. Figures from the DCC Tourism survey in 2002 show a record level of tourism expenditure in the area.

**Quality** - Overall, only 26% of accommodation operators in North Devon have a nationally recognised grading with the ETC/AA/RAC. This is 10% lower than the regional average. All sectors have low levels of participation in the schemes.

**Length of Stay** - The industry is dominated by self-catering accommodation (77%) of one form or another resulting in a longer than average length of stay of just over five nights.

**Occupancy Rates** - The season is growing longer with improved occupancies in the shoulder periods but is still largely limited to the April - October period. The peak weeks have remained relatively unchanged.

**Second Homes** - The number of second homes in the area is a concern. Although the overall economic losses at the moment are relatively small and some of the loss to the area is offset by expenditure by owners on local services in maintaining the properties, it tends to be highly concentrated in small coastal communities such as Woolacombe, Croyde and Combe Martin. This is causing problems with loss of a critical mass of commercial stock and subsequent spend in secondary businesses in the community such as retail and catering as well as social concerns about stocks of affordable housing.

**Main Competition** - North Devon's main competitors are primarily from within the South West itself and particularly coastal areas in Devon and Cornwall.

The competitor analysis also shows that the area is being seen as an alternative to such destinations as Scotland and the Lake District which are not, in the main, traditional family or coastal destinations and do have a strong emphasis on outdoor activities such as walking, wildlife, horse riding etc.

The relatively high proportion of enquirers that eventually choose to go abroad shows that North Devon is also competing in the main holiday market against the overseas destinations and so quality, value for money and accessibility will be key factors in the choice.

## CONCLUSION

The Trend Analysis shows an industry that is experiencing a fall in commercial accommodation stock and a growth in second homes but an increase in its nights and market share.

Although 2002 saw the industry return to a relatively healthy position, the Trend Analysis does identify some issues that need to be addressed in the strategy:

- **The decline in commercial accommodation stock, particularly serviced.**
- **The relatively low levels of accommodation with NQAS gradings**
- **The threat of (and opportunities with) competitors from within the region**
- **Combating global competition**
- **A season still largely limited to April - October**

## SOUTH WEST TOURISM MARKET FORECAST

In its 'Towards 2015 Strategy' SWT forecasts :-

- **The potential of up to 20% growth in domestic tourism spend with almost all this growth in the desirable off-peak and off season periods**
- **The potential of up to 19% growth in overseas tourism spend of which a suggested 10% increase is achievable and sustainable for the region**
- **A further 20% growth in spend by day visitors and those visiting Friends and Relatives (VFR)**
- **The potential increase in tourism incomes of up to 20% per year of which 15% could be achieved through responsible management.**

It also predicts that people will be less interested in a destination for its own sake and more interested in the experience they are likely to have. Through research it predicts that the top ten customer segments will be :-

- **Easy Preschool** - hassle free holidays for families with small children.
- **History and Heritage** - Exploring rich, historical legacies, cultures and traditions.
- **Its Adventure** - leading edge activities on water and land, safe and well managed.
- **Close to Nature** - sheer diversity and unique landscapes, local products, wildlife.
- **Discovery** - new activities and courses, learning through experience.
- **Sheer Indulgence** - Fine dining, pampering, cultural highlights, exceeding customer expectations.
- **Romance** - Special breaks, weddings, celebrations, away from it all, intimacy.
- **Chill Out** - escape rat race, relaxing activities, quality time.
- **Traditional Beach Holiday** - world class beaches, cream teas, attractions, family friendly.
- **Its Cool** - Young free single, surfing, clubbing, festivals.

# ROLES AND RESPONSIBILITIES IN TOURISM

Throughout the UK tourism is a very fragmented industry and dependent on the actions of both the public and private sector. In North Devon, this is no different although it probably comprises a higher degree of small businesses and environmental agencies.

## The Private Sector

It is the private sector that ultimately delivers the majority of the tourism product and service. There are the primary businesses such as accommodation, attractions and activity providers. The main beaches in North Devon are, unusually, in the hands of private operators.

There is a secondary level that benefit from tourist expenditure such as retail, catering, transport, leisure and arts and crafts.

Then there are tertiary businesses such as banks, wholesalers, suppliers, professional services, construction etc. that benefit from the profitability of the primary and secondary businesses.

## The North Devon Marketing Bureau

In 1996, the North Devon Marketing Bureau was formed as a private/public sector partnership to promote and develop tourism. Previously the marketing had been undertaken by NDDC on behalf of the two authority areas but had limited resources. The availability of ERDF 5b support prompted the formation of a new organisation that drew together the funding of the two local authorities and local businesses in a company limited by guarantee. Over a four year period up until March 2000 the Marketing Bureau spent nearly £4.5 million including £1.2 million of ERDF funding. This enabled the organisation to increase its expenditure on promotional activities by four times. This included:

- Increasing the print run of the North Devon Guide from 130,000 to 200,000 copies p.a.
- Undertaking TV, Radio and Teletext Advertising campaigns.
- Initiating press campaigns including, in 1997, the 'largest ever campaign in IPC magazines by a UK travel provider'.
- Initiating PR campaigns including visits by over 100 travel writers and journalists.
- Provide funding for Events and Festivals.
- Increasing support for TICs.

The graph on page 30 shows how this additional activity appeared to increase market share against the rest of Devon County. The average number of tourist nights since 1996 has been 8.2 million whereas in the previous seven year period it was only 7.1 million.

It is the focus for tourism promotion and development and currently has over 500 business members and an annual turnover of approximately £800,000. Its expenditure on advertising is still one of the largest of any single tourism destination in the UK and is, for example, greater than that spent by all the districts of Somerset combined.

As well as promotional activities the Marketing Bureau also provides Business Support and Training, grant aid for TICs (just NDDC area), local accommodation inspections and event support.

However, recent research shows that only about 30% of the 1,400 accommodation operators in the area are full members of the organisation.

## Tourism Associations/TICs

There are currently eight Tourism Associations that operate in the area some of which run TICs and some of which undertake their own marketing.

Association	Operates TIC	Produces Guide	Produces Acc List
Ilfracombe & District Tourism Association	Yes	Yes	No
Woolacombe & Morteohoe Tourism Association	Yes	Yes	No
Lynton TIC Co-operative	Yes	No	Yes
Combe Martin Tourism Association	Yes <small>(In Partnership with ENP)</small>	Yes	Yes
Braunton Publicity Association	Yes	No	Yes
South Molton Tourism Association	Yes	Yes	No
Torrige Tourism Association	No <small>(Operated by TDC/CDT/HTC)</small>	No	Yes
Exmoor Tourism Association	No	Yes	No
North Devon Coast and Country Farm Holiday Group	No	Yes	No

Barnstaple does not have a Tourism Association, although there is a Town Centre Manager who represents the wider commercial interests in the town. The TIC is operated independently but does receive grant aid from the Marketing Bureau.

All the Associations meet with the Marketing Bureau on a quarterly basis via the Regional Advisory Panel.

Each Association has its own membership scheme with various member benefits that, where applicable tie in with either the TIC or promotional opportunities.

There are nine networked Tourist Information Centres in the area. All but Bideford and Torrington are grant aided by the Marketing Bureau. The funding for Bideford is provided by TDC and Torrington via the Community Development Trust. Most are open all year round and they collectively handle over 600,000 enquiries each year:

TIC	Visitor (Footfall) Enquiries 2000	All Year Opening	Website	VISIT System
Barnstaple*	104,868	Yes	Yes	No
Ilfracombe*	163,940	Yes	Yes	Yes
Lynton*	103,242	Yes	Yes	No
Braunton*	38,536	Yes	Yes	Yes
Woolacombe*	62,940	Yes	Yes	Yes
South Molton*	21,314	No	Yes	No
Combe Martin*	46,353	Yes	Yes	No
Bideford	69,464	Yes	No	Yes
Torrington	16,000	Yes	Yes	No
<b>Total</b>	<b>626,657</b>			<b>*NDMB Funded</b>

The TICs provide a range of services - accommodation booking, ticket sales, rail & coach tickets, Bureau de Change, books and maps, souvenirs, leaflet display - and most now support a website and have email. In 1997, PROSPER introduced a new networked information system for TICs called VISIT and the North Devon Marketing Bureau secured some funding to enable all the TICs to purchase a system. However, currently, only four still operate it but the new **Englandnet** structure will be VISIT compatible and those TICs will be able to integrate with it easily.

There are also visitor information centres (VICs) at Holsworthy and Atlantic Village Factory Outlet. The former is operated by Holsworthy Town Council and although it is not officially networked it operates many of the services provided by official TICs and has its own website. It is closed for two months of the year. The VIC at Atlantic Village is seasonal - Easter-October - and is supported by TDC, TTA, Bideford Town Council and Leader + funding.

## Local Authorities

The District Councils play a key role in many aspects of tourism both through the provision of infrastructure - leisure and entertainment facilities, coach and car parks, public conveniences, etc. as well as providing assistance for various agencies that promote, develop and support tourism. In recent years, local authority bids to EU, Lottery and other funding sources have resulted in substantial capital investments in the area.

The District Councils are also responsible for waste management, street cleaning, litter bins and the regulation of standards in planning, catering and health and safety.

Both District Councils provide the core funding for the North Devon Marketing Bureau in order that it can perform various marketing and development functions. However, Torridge District Council also employ a Tourism Development Officer but it does not engage in any marketing activity and is primarily concerned with special projects, TIC development and liaison with the industry.

The County Council is responsible for infrastructure such as roads and footpaths as well as countryside management including the Tarka Trail and maintenance of AONBs. It also administers brown tourism signing and is responsible for many aspects of public transport. The annual Devon Tourism Survey is undertaken by the County Council and results passed to the districts.

All the local authorities determine the wider development of the area through Local and Structure Plans.

## Devon Tourism

Devon County Council operate a tourism department although in recent years it has changed its role from one of a producer of its own marketing material to one of enabler and creator of partnerships in the County. It no longer produces a Devon Guide or operates TICs, leaving this to the individual districts in the county to do in partnerships with the private sector. It has recently started to develop a Devon brand 'Discover Devon' including establishing a portal website that will link to the **Englandnet** infrastructure and a Holiday Booking telephone service.

## Devon and Cornwall Overseas Marketing Consortium

All the districts and the two counties of Devon and Cornwall undertake their overseas marketing through DACOM. The organisation has benefited from ERDF 5b funding in the past and new applications for support have been made to Objective 1 and 2. It mainly promotes the region in Northern Europe. The most common overseas visitors to North Devon tend to be Germans and Dutch visitors. It is estimated that overseas visitors account for over 4.8 million bednights and £176 million of expenditure in Devon and Cornwall each year.

## South West Tourism/SWRDA

South West Tourism is the regional Tourist Board covering seven counties in the South West. It operates as a company limited by guarantee with its funding coming from central and local government

and private businesses. It currently has 4,000 members, employs 40 staff and had a turnover in 2000/1 of £2.6 million. Its stated aims are:

- **Generating new and repeat customers through professionally researched and executed marketing campaigns.**
- **Steering the development of tourism in the region through key strategic development projects.**
- **Representing and lobbying for a fair economic and public policy position which will enable the industry to develop and grow.**
- **Saving tourism businesses money through membership benefits, discounted purchasing and cost saving opportunities.**
- **Providing high quality relevant business support services to tourism operators.**

It undertakes a variety of promotional initiatives including specialist print for different accommodation sectors although in recent years it has dropped its main holiday guide and concentrated on the development of a website.

Nationally, the accommodation inspection scheme is contracted to Unicorn Tourism Ltd so SWT does not actually undertake the inspections, it does however, monitor the inspection visits and provides specialist advice on grading.

SWT is now working very closely with the Regional Development Agency. It will be drawing additional funding for tourism over the next few years as well as restructuring itself to provide independent strategic and commercial services.

## Environmental Agencies

North Devon has a very high quality natural environment and this is reflected in the range of organisations that play a part in its protection and conservation. These include Exmoor National Park, the National Trust, Northern Devon Coast and Countryside Service, Devon Wildlife Trust, South West Forests, the South West Coast Path Association, South West Lakes Trust, the Ruby Country Project and the Countryside Agency. The Ruby Country Project in Holsworthy and the QUEST Project on Exmoor have attempted to integrate the environmental and tourism issues in recent years.

South West Water has made considerable investment in the water and sewage systems in recent years enabling the beaches to achieve Blue Flag and Seaside Awards.

## Education, Training and Business Support

Specific training for tourism businesses has been undertaken by the North Devon Marketing Bureau since 1996 but has mainly involved one day workshops and seminars. A Mentoring Programme has also been available from the Bureau in recent years using RDA funding and this has enabled more concentrated one-to-one assistance.

Longer term vocational training and workplace learning is available through North Devon College and staff training schemes have been set up with larger operators in the area.

The RDA has recently established the Tourism Skills Network, which has a sub regional base in Devon.

Training and business support is also available via the Learning and Skills Council, Business Link, North Devon Enterprise Agency, Job Centre + and Devon Wildlife Trust through its Confidence in the Countryside and North Devon Coastal Communities projects.

The Ruby Country Project also assists businesses in a number of ways in the Holsworthy/Hatherleigh area with sustainability, marketing and product development initiatives.

Envision has been established in recent years with support from ERDF to supply a one stop shop for environmental advice on energy, waste, water, transport and training. It has already worked with tourism businesses on saving costs, increasing customer loyalty and market share and developing new market opportunities through adopting a more sustainable approach.

# STRATEGIC CONTEXT

The diverse nature of tourism and the range of factors that can effect both demand and supply makes a definitive analysis of strategic influences very difficult.

Appendix C identifies the main agencies and respective policies that have been published in recent years. This summary groups the strategic leads under the following headings:

- **Tourism**
- **Sustainable Tourism**
- **Culture**
- **Economic Development**
- **Structure Plans**
- **Skill Development**

However, there are, at this stage, no details of strategic policies from the many Environmental Agencies that operate in North Devon. Nevertheless, the importance of the agencies should not be underestimated and this strategy will address how it can achieve greater integration.

## Tourism - European, National and Regional Policies

The Tourism Unit of the European Union works under the objectives of improving quality, competitiveness and sustainability and in looking after tourists' interests. A strategy was published in November 2001 "**Framing the Future of European Tourism**". In 2000 the ERDF Objective 2 Programme acknowledged tourism as a key sector for support with Priority 3 making £50 million Euros available for coastal and rural tourism projects.

The Government's Strategy for Tourism, "**Tomorrow's Tourism**" (produced by the Department of Culture, Media and Sport) and the Regional Tourist Boards "**2020 - A Tourism Strategy for the South West**" were both published in 1999. Both documents recognise the potential for growth and highlight the importance of local authorities and other local bodies in helping to deliver tourism objectives.

South West Tourism has recently issued a consultation document on it's proposals for the development of the tourism industry in the region for the next ten years.

**'Towards 2015 Shaping Tomorrows Tourism' has three Key Strategic Aims:**

1. Driving Up Quality
2. Delivering Truly Sustainable Tourism
3. Creating Superior Destination Management Arrangements

## Other National Initiatives - The English Tourism Council

During the period 2000-2002 the English Tourism Council published a series of documents further taking forward some of the priorities identified in the Government's tourism strategy covering areas such as research and intelligence, attractions, resort regeneration, sustainability, transport, rural tourism and health tourism.

## Devon County Council "Tourism - Everybody's Business"

Devon County Council published its strategy in 2003.

## Torrige District Council Tourism Development Strategy

Torrige District Council adopted the existing Tourism Development Strategy in 1998 with the overall vision of creating a sustainable tourism industry which provides a high quality experience for tourists and gives real and demonstrable benefits to the people of Torrige whilst preserving the unique resources and unspoilt charm of the area.

## Sustainable Tourism

In recent years many Community, Economic and Tourism strategies have been built on ensuring that all development does not compromise the region's biggest asset - the environment either now or for the future.

**The Tourism Management Institute** (TMI) has published its Visitor, Industry, Community and Environment (VICE) Model for developing sustainability in tourism destinations.

**The Regional Sustainable Development Framework for the South West of England** identifies three main objectives for improving sustainability in the region :-

- Promotion of sustainable tourism, which conserves and enhances the environment and has the support of local communities
- Enhancing the resource and promoting quality
- Extending the season and promoting the historic and cultural environment

South West Tourism, in its recent Consultation Strategy 'Towards 2015', identified its second key Strategic Aim as :-

**"Delivering truly sustainable tourism in order that tourism can continue to be a key sector of the SW economy for decades to come. Sustainable tourism is about the interaction between the needs of the visitor, industry, community and environment."**

**Local Agenda 21** is now well established in most areas in the UK and **North Devon District Council** have used its guiding principles in defining sustainable economic development :-

- A healthy local economy is vital to sustainable development. It is as important for the local economy as for the environment that local producers have opportunities to sell their produce locally. Outside of the main centre of Barnstaple, North Devon's economy is largely dependent on tourism and food production. Tourism and other businesses can also damage the local environment if they are not sensitively managed.

This Council will secure a sustainable economy by:

- Supporting local business by purchasing locally produced goods and using local suppliers
- Encouraging local communities to support local business by purchasing locally produced goods and using local suppliers
- Developing community enterprise in the rural areas thus reducing the need to travel and having the additional benefit of profits being ploughed back into the local community
- Promoting sustainable development through its Economic Development Strategy
- Continuing to encourage the 'greening' of the tourist industry through activities of the North Devon Marketing Bureau
- Protecting and enhancing the local agricultural industry whilst encouraging environmentally friendly practices through the development of the North Devon Agriculture Forum and other initiatives
- Using the development plan process to support local businesses and producers

The **North Devon First Community Strategy** has Key Objectives that include :-

- Encourage a prosperous, developing, sustainable economy
- Protect our high quality urban and rural environment as our greatest asset
- Enhance our distinctive cultural and environmental assets for the benefit of residents and visitors alike.

It particularly addresses traffic and congestion issues :-

- Support employers to develop and implement Green Travel Plans
- Identify and implement the best solutions to traffic problems in Ilfracombe, Barnstaple and Braunton
- Implement a car parking strategy in Ilfracombe and Barnstaple by 2003
- Extend and increase use of cycle routes every year
- Review the bus network, associated information services and identify opportunities for improvement by 2003
- Seek funding to continue public transport initiatives
- Work with the Railway industry and others to influence the quality of the rail network serving North Devon.

## Cultural Strategies

**“In search of Chunky Dunsters...A Cultural Strategy for the South West”** was produced in 2001 by Culture South West, the Regional Cultural Consortium. Its aim is to provide strong strategic leadership and to work with partners to celebrate, champion and increase cultural opportunities across the South West.

The Torridge and North Devon Districts were one of the first partnerships to pilot the production of a joint strategy, **“A Local Cultural Strategy for Northern Devon 2000-2005”**.

The strategy outlines local cultural activities, looks at future opportunities and agrees an overall vision statement along with four inter-linked strategic themes and related objectives.

## Economic Development

Since the Foot and Mouth crisis in 2001 the SW Regional Development Agency has taken a lead role in tourism strategy and is putting in substantial funding for branding of the region and supporting SWT on tourism promotion generally. It is also supporting regeneration initiatives and skill development that will all impact on the tourism industry.

### The England Rural Development Programme

The England Rural Development Programme (ERDP) underpins the Government's New Direction for Agriculture by helping farmers and foresters to respond better to consumer requirements and become more competitive, diverse, flexible and environmentally responsible. It also provides help to rural businesses and communities, which need to adapt and develop. The ERDP places much stronger emphasis on addressing regional and local issues and on encouraging and developing ideas at grass roots level. It is intended that the ERDP will play a major role in helping rural businesses recover from the effects of the Foot and Mouth Crisis. £1.6bn will be available to farmers over the next seven years for environmental protection and improvement and rural development.

In particular the Rural Enterprise Scheme offers a range of activities designed to help farmers develop their businesses within the local economy, and to provide wider benefits for rural communities and the environment.

### North West Devon Economic Partnership Strategy 2001-2006

The Strategy has a vision of North West Devon as

**“A thriving and vibrant place to live and work where environmental and cultural resources are sustained and enhanced”**

It recognises the importance of tourism as a driver of change in the local economy and how it integrates with other sectors of the economy. The Partnership are currently updating the Strategy which, as a result of the UNESCO Biosphere status, will be much more focussed on sustainable growth.

In 2002, the Partnership formed the **North Devon & Exmoor Regeneration Company** to provide an executive that could actually deliver projects and make the most effective use of resources in the area to

**“promote and co-ordinate sustainable, economic and social regeneration in North Devon and Exmoor to maximise local benefits for communities and make the most effective use of all resources available”**

A number of projects are supported by the North Devon and Exmoor Regeneration Company, including:

#### **i) Integrated Area Plan (IAP) for Northern Devon and West Somerset**

The IAP provides a framework for project applications seeking funding from the South West Objective Two Programme. The proposed plan covers the eligible areas in the districts of Torridge, North Devon and West Somerset and offers the opportunity for rural communities in this area to develop a co-ordinated strategy, delivery plan and projects relevant to their particular area.

#### **ii) LEADER+**

LEADER+ has been developed to assist rural communities and is currently available in the Torridge and North Devon area. Funding is available to meet the needs of rural communities through development of sustainable projects. The Local Action Group (LAG) is responsible for appraising and selecting individual projects for support.

**The following key funds are available/being developed:**

#### **Priority One:**

1. Access to the Countryside
2. Local Learning Accounts
3. Business Development Grant

Funding for larger, innovative projects that support the objectives and outputs of the programme is also available.

#### **Priority Two:**

1. Business Start Up
2. Innovation Fund
3. Mentoring Scheme
4. Tourism, Marketing & Events - can support businesses up to a maximum of 55% or £6,000 and community groups up to a maximum of 70% or £3,000 (whichever is the lower). It can support signage, events management, leaflets, posters, display or exhibition materials. Projects should achieve at least one of the following outputs: provide improvements to a tourist site, attract new visitors, increase visitor spend, support sustainable tourism initiatives or create/secure employment.
5. Access to Transnational Activities.

#### **iv) Objective 2 Priority 1 - Neighbourhood Renewal**

To provide support in Northern Devon and Torridge, local partners have submitted a complementary application for Objective 2 Priority 1 funds for the eligible Parishes of Westward Ho!, Appledore East, St. Mary's, Barnstaple Trinity, Ilfracombe East and Ilfracombe Central. This will be an essential resource for engaging the community in the local regeneration activity. Projects will be developed by Community Workers who are employed by the Regeneration Company, but who report back to their communities.

Technical Assistance in writing bids is also available within the Regeneration Company.

## **Development Plans**

### **Devon Structure Plan 1995-2011**

This document sets out the strategic planning framework for the development and use of land to 2011 for the administrative areas of the County of Devon. In terms of tourism, it recognises the importance of the environment and the industry to the economy.

It is also clear in identifying the potential conflict between tourism and the environment and clearly states that this partnership needs to be carefully managed.

It is stated that future developments in the tourism industry should be focused on lengthening the tourist season and improving the quality of the product in terms of accommodation and leisure and recreation facilities. Benefits to the economy should be maximised and environmental disadvantages minimised.

### **Torridge District Council and North Devon District Council Local Plans**

Lay down the detailed framework of allowable tourism development in each area. Both plans have an emphasis on improving quality and protecting the environment from harmful developments.

## **Skills Development**

With the advent of the Learning and Skills Councils there are a number of programmes that would be relevant to improving the quality of tourism workforce. The most relevant at this stage is the Tourism Skills Network (TSN).

The TSN is a SWRDA initiative involving employers, SWT, training agencies, local authorities and sub-regional partnerships that intends to focus the efforts of those involved as trainers, employers and facilitators on measures that will increase the competitiveness of the industry through workforce development.

## **Environmental Agencies**

There are several organisations across the North Devon area that manage areas of land and/or facilities that are of great importance to the tourism product within the area. All of these organisations have their own aims and objectives, which should be considered in terms of strategic development across the area. The two most influential will be the emerging AONB Strategy and Action Plan and the Biosphere Strategy.

These organisations include:

- Northern Devon Coast and Countryside Service  
AONB Strategy and Management Plan (see Appendix C)  
UNESCO Biosphere Strategy
- Exmoor National Park
- National Trust
- Northern Devon Coast and Countryside Service
- Devon Wildlife Trust
- Lundy
- South West Water
- South West Lakes Trust
- Environment Agency
- Forestry Commission and Forest Enterprise
- South West Forest
- The Countryside Agency  
The Land Between The Moors -  
Consultation draft Jan 2004

To include all these policies in this draft Consultation would clearly not be practical but they all may have an influence on any tourism developments over the next five years.

# THE FUTURE CHALLENGES

Tourism is a world wide and highly competitive industry and it is one of the fastest growing. In North Devon it plays a significant part in the prosperity of the area and, overall, enhances the quality of life of visitors and residents alike.

However, in the short-term, it can be highly volatile, subject to many economic, social and environmental influences, but, in the long-term it continues to grow and support economies.

From the preceding chapters looking at the tourism assets, trends, organisation and strategic framework it is possible to summarise the area through a simple Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis.

## SWOT Analysis

### Strengths

- High quality and diversity of environment in terms of coast, countryside and built heritage including Exmoor National Park, AONBs, Biosphere Reserve, Lundy MNR, North Devon VMCA, footpaths and cycleways such as the South West Coast Path and Tarka Trail, rivers and watercourses.
- A diverse range of wildlife - Red Deer, Exmoor Ponies, birds, seals, dolphins etc.
- Relatively good climate.
- Friendly welcome - people have more time.
- A well-established and recognised destination/name.
- A good share of the total Devon tourist nights and spend and increasing occupancy rates.
- Strong public private sector partnership through the North Devon Marketing Bureau, the Economic Partnership and Regeneration Agency.
- Uncrowded and tranquil nature of the area.
- Diverse range of visitor attractions.
- Good opportunities for outdoor pursuits and special interest activities.
- Strong cultural tourism leadership and assets - festivals, theatres, arts, heritage.
- Good level of TIC/VIC provision.
- Largely locally owned industry with high commitment to the area.
- Strong private sector leaders and examples of best practice.
- Pro active FE College in workforce development.
- Specific training and mentoring provision for micro businesses through NDMB.
- Calvert Trust Centre for people of all abilities.

### Weaknesses

- Below the national average in accommodation achieving recognised NQAS standards.
- Lack of public and private sector investment in infrastructure and capital works in some areas.
- Perceived as difficult to get to from a visitor perspective.
- Tourist activity concentrated in summer months and restricted to coastal areas.
- Lack of knowledge in the market place of the diversity of tourism products in North Devon.
- Congestion on the routes to the South West in the peak season and in and around Barnstaple.
- Poor public transport linking the area.
- Perceived low wage, seasonal economy.
- Lack of winter opening of accommodation, attractions and visitor amenities.
- Recruitment and retention difficulties for employers.

- High numbers of 'lifestyle' businesses in rural areas.
- Local perception of low value sector of the economy.
- Relatively low level of membership of North Devon Marketing Bureau.
- Proliferation of memberships, promotional opportunities and tourism associations in the area.

### Opportunities

- Growth in short breaks, day trips and special interest activity holidays.
- Increasing marketing expenditure at national and regional level.
- All year round tourism.
- Development of centre for people of all abilities via Calvert Trust.
- Development of Biosphere status in both marketing and product development.
- **Sustainable Tourism initiatives such as Ruby Country, QUEST, Envision**
- Growth in arts and crafts and developing arts and crafts industries and initiatives.
- Increase in Information Technology usage and ICT developments.
- Improvements in the quality of existing service provision.
- A range of funding opportunities such as Objective 2, LEADER+ and Rural Renaissance.
- Potential for improved partnership working with the retail, catering and local suppliers sectors.
- Potential to increase membership of the Marketing Bureau and improve integration with local, sub regional and regional bodies.
- Provision of Business Support and Training via North Devon College, LSC, etc.
- Uncertain international situation, strong pound, terrorist threats etc, will increase domestic demand.
- Climate change to warmer longer summers and autumns.

### Threats

- Reduction in public sector funding.
- Lack of understanding by industry of need for sustainable approach to growth.
- Competition from other destinations in the South West and UK.
- On-going growth in competition from overseas main holiday destinations.
- Uncertain international situation, strong pound, terrorist threats etc, will reduce overseas visitors.
- Decline of bedspace capacity in some tourist resort areas.
- Lack of funding for TIC services.
- Traffic congestion on local roads, especially through Barnstaple.
- Lack of understanding by local people of the value of tourism to the local economy.
- Honey pot sites leading to the destruction of the environment on which the industry depends.
- Seasonal industry hindered by the public sector restrictions on operating tourist accommodation.
- Lack of ICT infrastructure - broadband provision.
- High impact of environmental incidents - oil spills, shipping, sewage, FMD.
- Climate change - wetter winters, storms, flooding, erosion to coastal areas.

## The Challenges

The SWOT Analysis leads to the identification of five key challenges that the industry must address in the next five years:

### Maximising support for the marketing of tourism

The advent of the North Devon Marketing Bureau in 1996 and the increased expenditure on promotional activities had an immediate impact on the market place catapulting tourist nights in 1997 to over 8 million for the first time ever. Whilst other areas of Devon saw their market share decline or, at best, remain static the North Devon area grew over 1%. The SWT Economic Impact Model put the area second in the region in terms of tourist expenditure.

It drew together public and private sector in an unprecedented fashion and is envied by many other tourism destinations in the UK. However, it still only represents a third of all tourism operators in North Devon and has relatively little support from related tourism sectors such as retail and catering.

In real terms, the Bureau's expenditure on marketing the area is less than 0.25% of the eventual visitor expenditure.

It now needs to take another quantum leap in the way it organises the industry as well as creating a greater synergy at local and regional level. More success in public/private sector partnerships should create the critical mass to make another real impact on the market place.

### Increasing the volume and value of tourism to the area

If the industry is to combat the problems of seasonality and improve the economic benefits of tourism then increasing the generic marketing is only part of the process. North Devon needs to stand out from its competitors, its needs to add value and aggressively sell its best assets. Businesses themselves need to understand and develop their marketing and be innovative and flexible in what they offer. Partnerships at local and regional level can help to deliver more cost effective campaigns.

Information needs to be easily accessible at all times otherwise visitors may go elsewhere.

Changing trends and customer needs have to be monitored and evaluated and then fed back into the process at all levels.

The loss of commercial accommodation stock in key resorts and the growth of second homes needs to be addressed particularly in areas where a critical mass of staying guests are required to support other services.

If tourism in North Devon is to truly be an all year round activity then the public sector needs to consider releasing some of the planning constraints that currently restrict the operation of some accommodation outlets.

### Achieving excellence in the delivery of products and services

Visitors are now more sophisticated than ever demanding higher quality, speedier service, more flexibility and better value for money. They are also increasingly IT literate and using the internet to search for and book holidays at short notice.

Accommodation in North Devon is currently below the regional average in terms of the numbers achieving the recognised NQAS

standards - this doesn't mean that it is necessarily poor quality as there are some fundamental barriers to participation. The large numbers of very small operators is one factor and the cost of the schemes is another.

The built and natural environment, commercial attractions and cultural and outdoor activities all play a crucial part in getting visitors here and it is essential that the quality in them all is right.

The provision of information at the right time, in the right place and of the right quality is also key to the experience of visitors. TICs, businesses themselves and leaflet distribution systems all play their part.

### Spreading the benefit throughout the economy

In order to maximise the benefit of tourism to an area it, firstly, needs to understand and appreciate what it can do. The traditional view of 'grockles' clogging up the roads and littering the beaches needs to be replaced with the view of tourism as a generator of wealth and jobs, supporter of local infrastructure and facilities and enhancer of the built and natural environment.

As part of this process it will be important that clear and credible data is collected on the full impact of tourism on the economic and social well being of the area.

Encouraging a culture of local purchasing by tourism operators will help a range of local suppliers. Also secondary businesses such as retail, catering and arts and crafts can all be major beneficiaries from visitor expenditure.

Rural areas particularly should be helped to draw visitors away from the coastal belt.

### Minimising Environmental impact and the effect on Local Communities

Over-riding all these challenges is the need to ensure that tourism does not destroy the environment that it depends on and neither does it make life for its incumbent population unbearable.

North Devon is well served by agencies that protect and conserve the environment and has local planning authorities that in the past have, in the main, limited tourism growth. The effective management of the land and the sustainability of the high quality is essential. As well as the agencies it is important that private businesses play their part in adopting sustainable practices in energy, waste, water, transport and local purchasing.

The relative small nature of the settlements in the area also makes it difficult for them to absorb large developments.

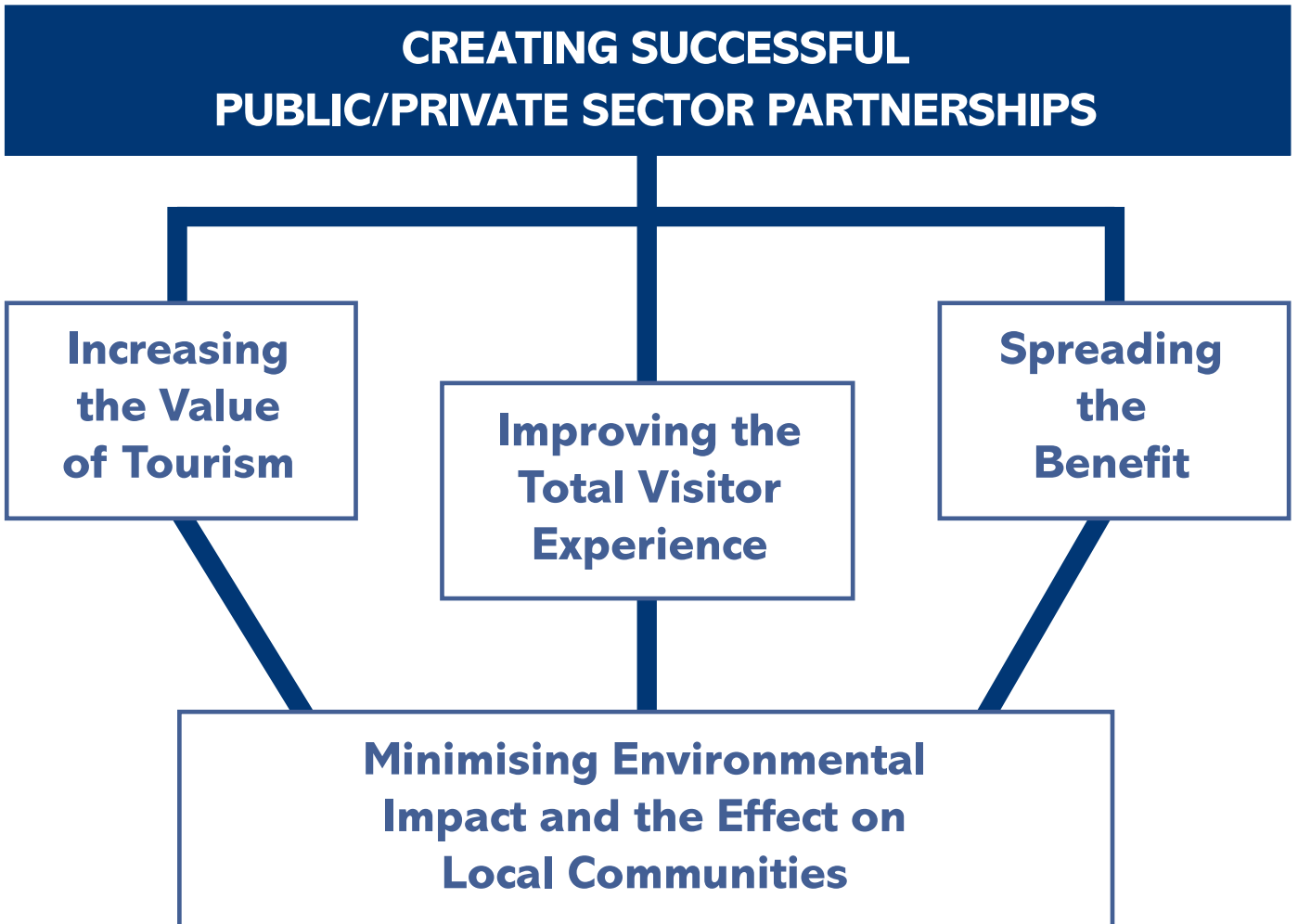
Congestion on the roads has been a concern in recent years and, although, bottlenecks such as Barnstaple are expected to get some relief in the near future, the industry should expect that there will be restraints on new tourism development.

Improvements in the quality of **existing** provision rather than **additional** provision would appear to be the higher priority.

## STRATEGIC POLICIES AND ACTIONS

One of the most fundamental issues that the strategic development for tourism has to contend with is the diversity and subsequent fragmentation that defines the industry. The players need to integrate and engage more both within the area and outside it.

In creating a *“World Class Industry in a World Class Environment”* the public and private sector needs to continue its strong history of working together in order to make a bigger impact, improve the quality and create more and wider benefits. Collectively, it must also ensure that there is a balance between business, community and the environment so that it provides the optimum economic, social and environmental benefits.



# STRATEGIC POLICIES AND ACTIONS

Entrepreneurs and business leaders are at the heart of the tourism industry. They can read the market, lead and manage change, adapt or reinvent existing business, or set up new ventures. But they will need the active support and engagement of public bodies to ensure that the strategic development of tourism and the successful implementation of key actions will take place.

The establishment of the North Devon Marketing Bureau has been a ground breaking achievement but it still only involves less than 30% of the operators in the area. The majority have no input to the collective marketing of North Devon and may also benefit from the infrastructure of TICs into which the Bureau makes substantial investment. The potential additional benefit to the area and its businesses and the philosophy of major new initiatives such as Englandnet should prompt the Marketing Bureau to seek to implement new policies and actions on securing a greater collective representation of the private sector.

Integral to achieving this within the accommodation sector alone is the issue of quality assurance and grading schemes. The participation in the NQAS is fundamental to the new initiatives such as Englandnet. Indeed, the benefits of the new funding coming at County, Regional and National level will be restricted to NQAS providers - there is a danger that the majority of North Devon's accommodation sector will miss out unless it can be persuaded to join. The Marketing Bureau should be seeking to resolve the issues at both ends of the process.

**The Objectives and Key Actions in this section focus on the expansion and development of partnership working at local and regional level:**

## Objective 1 - To secure a greater integration of bodies directly associated with the promotion and delivery of tourism.

In North Devon, the generic marketing is centralised through the North Devon Marketing Bureau. However, there is a structure beneath the Bureau in the form of the Tourism Associations that has no real connection to the central organisation. Even though most of the Tourism Associations draw substantial funding support from the Bureau for the running of the TICs, the Bureau has no reciprocal benefits in the form of membership, other than the Association itself. Consequently, the sum total of the TIC membership is considerably greater than that of the Marketing Bureau. In addition, it has no real control on the operation of the TICs and the standards to which they need to aspire.

The advent of **Englandnet** demands a co-ordinated and formalised structure that avoids duplication otherwise many operators could miss out on the opportunity to benefit from the initiative and the Bureau could fail to maximise the promotion of the North Devon brand via the internet.

### Key Action 1.1

There should be greater integration of the Marketing Bureau and the Tourism Associations that allows the Marketing Bureau to secure a greater representation of the operators in the industry & generate more revenue to use for the marketing of the area. The Marketing Bureau should also be more proactive in selling its services to the industry. - NDMB, TAs.

### Key Action 1.2

This relationship should be used to secure the viability and stability of the TICs, improve standards and maximise the participation in, and returns from, Englandnet. - NDMB, NDDC, TDC, TAs, TICs, GTCDT, HTC.

The Marketing Bureau is a member of the North Devon Economic Partnership and is actively supporting the North Devon and Exmoor Regeneration Company. Although attempts to merge West

Somerset and North Devon failed in 2000 the advent of the Regeneration Company and the willingness of WSDC to work co-operatively at the higher level of economic development should not preclude any future discussions about a formal merger of the tourism sectors. Such a merger would create the biggest single destination marketing organisation in the South West and, in light of SWT's 2015 proposals on the creation of DMOs and DMPs, should prompt support from the SWRDA and SWT. However, the merger should have the support of the majority of private sector operators, be based on equitable investments by the public sector partners and result in a net gain for any such organisation.

The establishment of the QUEST (Quality Underpins Exmoor's Sustainable Tourism) project covering the Greater Exmoor area will also mean a more focussed strategic lead for Exmoor on marketing and quality issues.

### Key Action 1.3

To continue to explore the potential of a merger with West Somerset and to co-ordinate with the QUEST project - NDMB, NDDC, TDC, WSDC, ETA, SWT, QST.

The devolution of more funding to the Regional Development Agency and, subsequently, to South West Tourism will undoubtedly strengthen the influence of the Regional Tourist Board over the next few years. It is also tasked with initiating new sub regional structures at County level that could also draw down additional funding for a variety of activities.

It is considered that SWT could improve its effectiveness in delivering marketing and quality initiatives in the region if it could forge partnerships with a series of larger sub-regional DMOs or DMPs as opposed to the many district level organisations that currently exist. The North Devon Marketing Bureau (or a bigger organisation including West Somerset) could be one of those sub-regional representatives.

### Key Action 1.4

To ensure a pro-active presence in the new regional and sub-regional structures - NDMB, DCC, QST, SWT.

## Objective 2 - To increase the integration of tourism with other sectors of the economy

There are an estimated 6,000 businesses in the area out of which approximately 1,400 are directly related to tourism in the form of accommodation, attractions or activity providers. More recently, the recognition of the importance of tourism to the local economy was very much brought in to focus during the foot and mouth crisis. The effect a shut-down of tourism had on the other sectors of economy surprised many. The Cambridge Model also demonstrates the considerable benefits accrued by the retail and catering sectors in particular.

However, there is little support from non-tourism businesses towards the overall marketing of the area but there are competing interests from other trade associations for memberships and contributions towards activities. Such duplication should be minimised.

Environmental projects such as the Ruby Country initiative and the Biosphere status has enabled agencies such as the Devon Wildlife Trust and the Coast and Countryside Service to help increase the value that wildlife brings to tourism through training, access to sites, information and promotion.

### Key Action 2.1

To encourage greater synergy between the Marketing Bureau and the North Devon Chamber of Commerce, Town Centre Managers, the agricultural sector, environmental agencies and trade associations - NDMB, NDCCI, NDEP, BTM, ITM, DWT, RCP, NDCCS.

# INCREASING THE VALUE OF TOURISM

Tourism is still one of the world's fastest growing industries. SWT, in its 2015 strategy, estimate that expenditure from tourism has the potential to grow by 20% in the next ten years. Almost all of that would need to be in the off peak periods if it is to overcome the pressure that tourism puts on the area's key assets - its environment, communities and culture. Getting better value over a longer period of the year will also improve the quality of employment and provide a much more credible and sustainable industry.

However, tourism is highly competitive and there are thousands of options available to the consumer, not just in the UK but worldwide. Since the formation of the North Devon Marketing Bureau in 1996 and DACOM a year later there has been a greater concerted effort to raise the profile of North Devon nationally and internationally.

The challenge for North Devon over the next decade is to consolidate and extend its market position. It must market itself aggressively and consistently to ensure that it not only stays in the mind of regular customers but also captures the attention of potential new visitors. The relatively under - promoted day trip and visiting friends and relations (VFR) markets should also be given consideration.

However, raising awareness is only half the battle - the crucial part is making the sale.

**There are a number of factors that can increase the chances of conversion. These are encompassed within the following Objectives and Key Actions:**

## Objective 3 - To increase awareness of the North Devon brand

In the UK and particularly in the South West there are many other destinations, some of which are offering similar experiences and packages. To make North Devon stand out it must not only market itself at the highest level but it must also develop local distinctiveness. This includes its natural and built environment, culture, food and drink, quality of service and value for money. The granting of UNESCO World Biosphere status to the Taw/Torridge Estuary area must play a key part in establishing this distinctiveness.

The North Devon Economic Partnership has already gone some way to establishing clear geographic demarcation for industry and business. Hence, there has been considerable progress in developing a strong North Devon identity and its adoption by the wider community. There is also work going on at county and regional levels for Devon and South West brands.

### Key Action 3.1

To increase the level of marketing expenditure available to the North Devon Marketing Bureau to enable it to raise the level of awareness of North Devon - NDMB, PS, TAs.

### Key Action 3.2

To further develop and promote a clear North Devon brand that accentuates local distinctiveness and is based on consumer understanding and insights. This should include maximising the opportunities offered by the UNESCO World Biosphere status - NDMB, PS, TAs, DCC and NDCCS.

### Key Action 3.3

To encourage the adoption of the brand and its key messages by all sectors of the community to improve the marketing consistency. It should also integrate with county and regional brands - NDMB, PS, TAs, DCC and SWT.

## Objective 4 - To increase the number and value of holidays sold

In such a diverse area as North Devon it would be tempting to pursue a 'something for everyone' approach to marketing. However, a more effective strategy would be to identify a customer behaviour and type that will offer the best return.

For example, in recent years there has been a growth in activity based holidays and North Devon has particularly strong environmental resources and infrastructure that have seen watersports, cycling and walking become very popular. The recent Cultural Strategy recognises the importance to the local economy of arts and crafts and there is a strong commitment in the area to developing arts based festivals. SWT's new strategy sees the motivation for customer choice being experience led rather than determined by the destination per se especially in the short break market.

These refinements can be made both at a destination marketing level and also by individual businesses in developing their own packages.

### Key Action 4.1

To identify key products, target markets and customer segments and disseminate that information to the tourism industry - NDMB, DCC, SWT.

There is only so much that can go on at the destination marketing level - enquiries can be generated but ultimately the effective point of sale is in the hands of individual businesses. However, many come into the industry with little or no marketing experience and, hence, business can be lost at the enquiry stage because of poor customer service, weak promotional literature or inflexible pricing. Moreover, when bookings have been secured and the holiday taken some businesses still fail to utilise the opportunity to promote repeat visits. Also expertise in the use of the internet is rapidly becoming a vital skill in generating and converting a booking.

### Key Action 4.2

To provide support to tourism businesses on the development of marketing skills, marketing opportunities and effective use of the internet - NDMB, NDC, BL and TSN.

Very often consumers will buy a product if they perceive it as having an added value. For example, accommodation operators have been putting together packages with local golf clubs, shooting providers and horse riding stables for some years and more recently others having been selling their accommodation on the basis of combining it with visits to major attractions such as the Eden Project. The environmental excellence of the area and the increasingly active roles of some of the agencies in developing and interpreting habitats offers new potential. The centre of Excellence at the Calvert Trust for activities for the disabled presents wider opportunities.

### Key Action 4.3

To encourage tourism partnerships between accommodation, attractions, activity providers, environmental agencies and events to provide added value incentives to book - NDMB, PS, DWT, NDCCS, SWF, SWL, CT.

Destination marketing organisations are, in the main, simply promoters and information providers. It is considered that if they really wish to effectively market their areas then they have to become more heavily involved in the development and selling of actual tourism products. The North Devon Marketing Bureau was one of the first in the UK to set up its own commercial ground handling enterprise selling packaged walking holidays directly to the consumer and via a tour operator overseas. Currently in many UK destinations and certainly in North Devon, there are few professional local ground handlers packaging the destination experience so there is little competition.

## Key Action 4.4

The North Devon Marketing Bureau should investigate the expansion of its packaged holiday operation to include other activities - NDMB, PS.

The accessibility to quality information about a particular destination will aid the propensity for consumers to book a holiday and key in this process are the Tourist Information Centres in the area. Out of hours provision of information and handling calls at peak times are issues for TICs and if not provided for can mean lost business to the area. TICs also need to ensure that information is accessible physically and intellectually for all varying disabilities.

## Key Action 4.5

To encourage and support the improvement of TIC services to ensure effective out of hours and peak time response systems - TAs, TICs, TDC, GTCDDT, and HTC.

The cost of promoting North Devon in isolation overseas has long been recognised as being prohibitive and, hence, it has been an active partner in DACOM. DACOM has now secured Objective 1 and 2 funding for a further 3 year period but there are still a very limited number of operators in the area that support DACOM or wish to promote to the overseas markets. And, in view of the fact that most overseas visitors to this area are from Europe, it is of concern that few are able to take the Euro.

More recently Ilfracombe has become a member of the Destination South West promotion, which is aimed at attracting foreign Cruise Ships into the harbour. It is likely that the visitors from the Liners will be taking day trips into the hinterland thus benefiting a much wider area.

## Key Action 4.6

North Devon should continue to support DACOM and encourage more operators in the area to also do so - NDMB, PS, DACOM.

## Key Action 4.7

To encourage more businesses to price and process bookings in Euros - NDMB, PS, DACOM.

## Key Action 4.8

To support Ilfracombe's participation in the South West Cruise Liners promotion - NDMB, ITM.

In addition to those visitors staying in commercial accommodation there are two other types of holiday expenditure that occur - Visiting Friends and Relations (VFR) and Day Trips. In the Devon Tourism Survey it is estimated that as much as 20% of total expenditure emanates from the VFR market. Recent ETC research concluded that 74% of ABs took a VFR trip and an average of eight per year. In addition, hosts tended to go with staying guests when visiting attractions or eating out. International experience with 'be a tourist in your own town' type promotions have increased the levels of VFR.

The Cambridge Model estimates that North Devon also receives 7.5 million day trips each year - many of these will be going to the beaches, attractions or perhaps shopping. Some will be residents but others will be tourists staying in other parts of Devon, Cornwall and Somerset.

## Key Action 4.9

To make local residents aware of the range of opportunities available to VFR including making use of local TICs. (Also see Spreading the Benefit Key Action 11.3) - NDMB, PS.

## Key Action 4.10

To undertake promotional activity aimed at bringing more day trippers into the area - NDMB, PS, BTCM, ITM.

## Objective 5 - To encourage all year round tourism

The majority of holidays in North Devon are taken between Easter and October with over 40% in the two months of July and August.

This seasonality problem can result in low profitability and subsequent lack of investment as well as limiting employment opportunities with temporary, part-time jobs being the norm.

The accommodation sector is dominated by self-catering accommodation much of which is restricted from opening in the winter period. The prevalence of small businesses in the self-catering and serviced sector is also a factor due to the lack of resources and motivation to stay open all year round.

## Key Action 5.1

To encourage the planning authorities to consider longer periods of opening for self-catering accommodation - NDMB, NDDC, and TDC.

## Key Action 5.2

To encourage accommodation operators to develop short-break packages linked to activities and/or events - NDMB, TAs, PS.

## Objective 6 - To establish systems of monitoring and understanding changing customer behaviour.

It is essential that any promotional activity is effectively monitored and evaluated both at destination level and individual business level. However, the destination marketing agency can also play a role in recording and identifying long term trends and undertaking generic research on visitors and non-visitors perceptions of the area. It can also assess competitors and benchmark against best practice in other similar destinations. The use and understanding of the environment by visitors would be particularly important to monitor in light of the focus of the Strategy on the sustainability issues.

## Key Action 6.1

To keep destination marketing activity under constant review and adapt it as customers change and new cost effective techniques evolve - NDMB, DCC, and SWT.

## Key Action 6.2

To encourage businesses to track and record customer details and obtain feedback via customer research - NDMB, DCC, SWT, PS.

## Key Action 6.3

Monitor trends and disseminate information to businesses and other relevant bodies - NDMB, DCC, SWT.

# IMPROVING THE TOTAL VISITOR EXPERIENCE

It is vital to consider the total visitor experience - from the first enquiry to the journey home. Everything the customer comes into contact with will help them formulate their decision to visit or, indeed, to return.

Consequently, there are factors outside the control of the industry itself, such as the weather or congestion on the motorway, but equally there are many other dynamics that determine the quality of experience.

The industry and the wider commercial environment in North Devon is made up of many small businesses each with differing standards and abilities. Many others are not run as businesses at all but are 'lifestyle' enterprises or just bring additional household income. The VAT threshold causes businesses to deliberately hold back from developing and trading longer. This can have a positive impact in providing a very personal approach but, equally, limited resources in both time and money can lead to under-investment in both service and product quality.

Yet, it is not just all about small businesses. The local authorities play a major part in providing some of the major infrastructure that visitors come into contact with. This can be public toilets, car parks, signposts, leisure and entertainment facilities and footpaths and cycleways.

It will also be important to co-ordinate with the QUEST project that is looking at the same issues in the Greater Exmoor area.

**The following Objectives and Key Actions attempt to focus on the main product and service delivery issues:**

## Objective 7 - To ensure adequate levels of business skills and expertise

Micro businesses account for over 75% of the enterprises in North Devon and, consequently, have little time, certainly during the season, to undertake extensive training. The large geographic area and its rural nature also means that it is difficult to travel to central locations for training and businesses can become isolated from any contact with fellow businesses or official agencies.

The turnover of businesses has, in recent years been relatively high, and many new entrants come into tourism without having run a business at all. Hence, it is important that they learn the necessary skills and 'tricks of the trade' as soon as possible. Equally, at the other end of the scale, there are business owners who may need updating on the latest trends or simply learn new skills such as IT.

Recently, North Devon College has been establishing on site training in hospitality and catering providing work based learning and long term vocational training. But there is still a requirement for basic training that can take place in the right locations and at the appropriate time of the year. Also there are businesses that could benefit from longer term one-to-one mentoring type advice with fellow business people.

All businesses should be made more aware of their impact on the environment and how through the adoption of sustainable practices they can lessen the impact and in many cases improve their profitability at the same time.

### Key Action 7.1

To target micro-businesses with appropriate training in core skills e.g. marketing, IT, catering, customer care. This could include the establishment of a permanent Centre of Excellence for small businesses - NDMB, NDC, NDEA, ES, TSN. ENV.

### Key Action 7.2

To establish a long-term Mentoring Programme involving successful business operators from key sectors - NDMB, PS, NDEA, TSN.

### Key Action 7.3

To disseminate information to potential business start-ups into the industry as well as provide actual support to new entrants - NDMB, TAs, NDEA, PS.

### Key Action 7.4

To promote the uptake of national programmes aimed at improving staff skills or business standards e.g. Welcome Host, Investors in People, Modern Apprenticeships - NDMB, NDC, ES, PS, and TSN.

## Objective 8 - To enhance the quality of key products and services

**Accommodation** - In North Devon only 29% of accommodation operators have been inspected under the National Quality Assurance Scheme (inc RAC/AA). Central Government and South West Tourism have declared that they wish all operators to be in the schemes and will not allow non-inspected properties to be part of any promotional activities including the new proposed *Englandnet* project.

Networked Tourist Information Centres too should only allow NQAS inspected properties to be registered, although this isn't currently enforced and in most TICs in North Devon most of the operators that are registered have not been inspected.

The consumer probably has little understanding of the standards, although comfort is probably drawn from the knowledge that the property has been independently inspected and, say, 4 stars is better than 2 stars. However, there is some research by the ETC to show that inspected properties do tend to enjoy better occupancy levels than non-inspected.

The Marketing Bureau has a stated aim to implement a graded only policy for its accommodation operators and, to this end, has been running an ETC sanctioned 'Stepping Stones' inspection scheme. This provides a basic local inspection and a report for the operator on what is needed to achieve an NQAS standard. It is clear from this that over 90% would achieve at least the basic NQAS levels - it appears that the main barrier to participation is the cost of the inspection. The Government is considering a franchised inspection scheme whereby a basic NQAS could be delivered by local agencies such as the Bureau or Tourism Associations/TICs. It is envisaged that this will reduce cost, improve participation and be more responsive to customer complaints but may not go far enough.

The trend analysis reveals a fairly large reduction in stock particularly in the coastal resorts and although this has probably been determined by market forces and should be welcomed there are concerns that some resorts may be losing critical mass. There may be a case for the planning authorities to review restrictions on change of use in Ilfracombe to, for example, allow hotel stock to become holiday apartments whilst on the other hand bringing in restrictions in other resorts such as Woolacombe where a concentrated loss of commercial serviced accommodation is becoming an real issue.

In the rural areas there has been a growth of stock particularly where farms have been encouraged to diversify into self-catering. However, there may only be a limited degree to which this can continue to grow.

There is a particular shortage of hotels in the area of 3 stars and above and certainly a lack in the main resorts. Generally, the Guest Accommodation sector is of good quality with a higher than average number of 4/5 diamond operators and independent self catering with more than average 3/4 star properties.

### Key Action 8.1

To continue to lobby the Government to enable local delivery of the NQAS - NDMB, DCC, SWT.

### Key Action 8.2

To encourage greater participation in the NQAS by accommodation operators and promote the scheme to visitors - NDMB, TAs, TICs.

### Key Action 8.3

To encourage the further development of 3, 4 and 5 star hotels in the area and particularly in Ilfracombe - NDMB, NDDC, IDTA, TDC.

### Key Action 8.4

To encourage the planning authorities to review implementation of change of use restrictions in Ilfracombe and Woolacombe - NDMB, NDDC, IDTA, WMTA.

### Key Action 8.5

Generally, new accommodation developments, including farm diversifications, should demonstrate a market need and be of high quality - NDMB, NDDC, and TDC.

### Key Action 8.6

To monitor the changes in accommodation stock and the growth of second homes for holiday letting and liaising with the local planning authority - NDMB, DCC, TDC, NDDC.

**Public Provision** - Public access to resorts, rural areas, attractions and facilities is all part of the holiday experience. This includes large parts of the coast and countryside via projects such as the Tarka Trail, theatres, swimming pools, car-parking, public conveniences, leisure centres, parks, etc.

These are maintained by a number of agencies such as ENP, NDCCS, NT, NDDC, TDC, DCC, SWCP, SWF, SW Lakes Trust, SWW that have tourism interests on the agenda.

### Key Action 8.7

To ensure that leisure facilities, footpaths, cycleways, bridlepaths and general countryside access, cultural facilities, signposting and environmental services meet the needs of visitors - NDDC, TDC, DCC, ENP, NT, NDCCS, DWT, SWF, SWL.

### Key Action 8.8

To establish an annual forum with relevant environmental agencies to discuss the role and relevance of tourism - NDMB.

**Tourist Attractions** - Perhaps the most visited attractions in North Devon are the beaches at Woolacombe, Putsborough, Croyde, Saunton, Instow and Westward Ho! All of these apart from Westward Ho! are privately owned. Woolacombe and Croyde have been awarded the Blue Flag and beaches at Putsborough, Hele Bay and Combe Martin have won a Seaside Award and do possess a high standard of facilities and cleanliness. Sewage treatment works at Cornborough by SWW should improve the water quality at Westward Ho! and Saunton and increase their

chances of securing a Blue Flag. However, Instow has a particular problem with water quality because it is on the river estuary.

There are over 30 commercial attractions in the area that are generally of a good standard although few have taken up the quality assessment scheme (VAQAS) that was introduced by SWT several years ago. In addition there are 15 museums or heritage centres that mostly run on a charitable trust basis or are supported by Town or District Councils. Few are experiencing increasing numbers of visitors and there must be limited opportunity for any new attractions in, say, the next five years.

The Eden Project, however, has demonstrated the impact a major new large scale development can have on an area.

### Key Action 8.9

To encourage and support the improvement in quality of existing attractions, including the beaches securing Blue Flags, and promote the adoption of a scheme for attraction standards - NDMB, NDDC, TDC, SWT, PS.

### Key Action 8.10

To give careful consideration to long term viability and the potential for displacement of any proposals for new commercial attractions in North Devon. To be supportive of new attractions that will bring additional visitors to the area - NDMB, NDDC, TDC.

**Events and Festivals** - In recent years there has been a growth in events and festivals especially in the May/June period. NDDC established the North Devon Festival in June after consultation with the tourist industry and similarly the early May Bank Holiday was chosen for the Walking Festival.

Such events are entirely consistent with the economic and social benefits identified in the Cultural Strategy and the creation of local distinctiveness as part of the marketing plan.

A bid by the Marketing Bureau to Objective 2 to develop key events in the May/June period was approved in November 2003 and will provide three years of funding support to 2006 to expand visitor numbers and value.

### Key Action 8.11

To develop and support Events and Festivals of a national standard in the off peak and shoulder season - NDMB, TDC, NDDC.

**Food and Drink** - Over 70% of visitors staying in North Devon do so in self-catering or Bed & Breakfast accommodation and, hence, potentially eating out is one of the main activities they indulge in.

The Marketing Bureau initiated the Pub Food Award (later the Food Award) in 1999 to encourage improved standards and the movement of visitors into the rural areas. Through the mentoring and general training programme it has also assisted with improving catering skills in businesses.

North Devon College has a well regarded Catering School.

Both Devon and Somerset have established Food Links organisations to promote local food and drink. In October 2002, DCC initiated a Devon wide Celebration of Food event. It was very well supported by all kinds of food and drink outlets in North Devon and not only raised the awareness with visitors to the area but also encouraged local purchasing.

The growth of Farmers Markets is also providing increased opportunities to purchase local products.

## Key Action 8.12

To encourage improved standards of catering in the area through the promotion of awards, training provision and events - NDMB, NDC, PS.

## Key Action 8.13

To encourage local purchasing of food and drink products by both visitors and businesses - NDMB, PS, DFL, SFL.

**Access for All** - The requirements of the Disability Discrimination Act imposes new duties on all service industries. There is now a need to ensure that the requirements of all visitors with disabilities and their families are met with suitable standards for those with mobility, visual and hearing impairments as well as understanding the cultural and language needs of minority groups.

It is also a market opportunity for accommodation, attraction and activity providers.

North Devon has a centre of excellence at the Calvert Trust and there are several attractions and leisure facilities that provide for the disabled. But generally in the accommodation sector there is little specific provision.

## Key Action 8.14

To ensure that the majority of existing facilities and infrastructure meet the requirements of all visitors with disabilities, whilst all new developments provide the highest level of disabled facilities - PS, NDDC, TDC.

## Key Action 8.15

To make tourism businesses aware of the physical barriers that impede access and the market opportunities that exist for visitors with disabilities - NDMB, SWT.

## Objective 9 - To meet the needs of visitors and potential visitors for information

The easy availability of information to customers is essential in not only converting the holiday booking in the first place but also in ensuring that the visitor gets the most out of the holiday.

The TICs are crucial services and in North Devon deal with over half a million enquiries each year. More potential visitors are using the internet to search for holiday information and then making the booking via IT. The new *Englandnet* initiative should make that much easier for domestic holidays but will depend on the quality of information being loaded into the system by TICs and DMO's. At the sharp end businesses will need to become familiar with the internet as a day to day business tool.

However, it is still anticipated that there will still be a demand for printed material particularly when visitors are actually in an area. There are a number of commercial operators that distribute leaflets on behalf of attractions and activity providers and TICs have various criteria on how and what is displayed. The whole system should be reviewed to see if a more cost effective process could be developed.

## Key Action 9.1

To maximise the effectiveness of the TIC network in providing information including maximising the opportunities provided by the *Englandnet* system - NDMB, TAs, TICs, DCC, SWT, TDC.

## Key Action 9.2

To promote and support the effective adoption of e-business by tourism businesses and TICs - NDMB, TICs, TDC.

## Key Action 9.3

To review the effectiveness of literature distribution systems for attractions and activity providers in the area - NDMB, PS, TICs, TDC.

## Objective 10 - To ensure the effective regeneration of resorts

The Trend Analysis shows that since 1986 all of the resorts have been losing accommodation stock although most notably Ilfracombe and Westward Ho! have accounted for nearly 90% of it. More recently, Woolacombe has lost several hotels to residential use or holiday homes.

It could be argued that the industry has simply been in a situation of over supply of bedstock, particularly since tourist nights have been increasing over the same period. However, the loss of stock has an effect on the critical mass of visitors that, in the past, has supported related sectors such as attractions, retail and catering outlets.

The changing nature of resorts and the decline of certain types of tourism needs to be recognised and new economic opportunities identified. Ilfracombe has recently appointed a Town Manager to develop and implement initiatives to regenerate the town. Ilfracombe and Westward Ho! are part of the new Market and Coastal Towns initiative that was set up following the foot and mouth crisis.

## Key Action 10.1

To support SWRDA's Market and Coastal Town's Initiative - NDMB, NDDC, TDC.

## Key Action 10.2

To support the development of holistic plans for resort regeneration - NDDC, TDC.

## Key Action 10.3

To monitor the changes in bedstock across the area and feedback from related sectors and alert the planning authorities of any impending problems - NDMB, TAs.

# SPREADING THE BENEFIT

Tourism needs to be recognised by the community in North Devon as not only a vital generator of wealth but also the supporter of local infrastructure and facilities that benefit local residents and businesses. Tourism potential to enhance both the natural and built environment is also important.

Many rural areas and market towns have suffered from changes in farming and other rural activities, especially following the Foot and Mouth crisis in 2001. Tourism can play a crucial role in providing alternative opportunities for generating income in those areas helping to sustain viable communities.

The benefit of tourism can be increased by building stronger links between the industry and related sectors such as retail, food and drink and arts and crafts as well as many suppliers and professional services that thrive in a healthy economy.

Residents and non-tourism businesses can also play their part in welcoming visitors to the area.

## Objective 11 - To improve the local understanding and awareness of the importance of tourism to the community

Perhaps many local residents see tourism simply as causing congestion on the roads, queues in the shops and pubs and providing 'candy floss' low paid jobs.

However, staying visitors alone spend over £255 million in the area and support nearly 10,000 FTE jobs - nearly 15% of the GDP. The Cambridge Model estimates that the multiplier effect may create as much as £518 million worth of business turnover in the area and over 14,000 jobs.

The Economic Strategy developed by the North Devon Economic Partnership sees tourism as one of the key growth sectors for the future with the Marketing Bureau playing a lead role in its development. It is crucial to the credibility of tourism that it can demonstrate the creation of direct jobs that are rewarding and can offer effective career structures.

### Key Action 11.1

To continue to support the Economic Partnership and maintain the strategic importance of sustainable tourism in the local economy. This should include establishing clear and credible data on the full economic impact of tourism - NDMB, NDEP, NDDC, TDC DCC

### Key Action 11.2

To implement a PR strategy to promote the benefits of tourism to local economic, social and environmental development. This includes school and community groups - NDMB, TAs, TICs.

### Key Action 11.3

To promote an annual local open day for residents with attractions, activity providers and TICs - NDMB, TICs, TAs.

### Key Action 11.4

To work with North Devon College Careers and Employment Services to draw attention to career opportunities in tourism and hospitality - NDMB, ES, NDC.

## Objective 12 - To encourage the involvement of other related sectors in the promotion of tourism

Visitors to the area not only spend in the accommodation and attractions but nearly all at sometime will probably want to eat out or do some shopping. Research shows that, for example, 60% of visitors to the area will at some time visit Barnstaple to either shop or sightsee.

Nearly 80% of visitors stay on the coast so it is important to try and encourage them to move into the rural areas to spread the benefit.

The Coastal and Market Towns Initiatives may be addressing how to generate more tourism related benefits.

### Key Action 12.1

To forge closer links between the industry and the retail sector through the local Chambers, Town Centre Managers and other representative bodies - NDMB, NDCCI, BTCM, ITM, NDEP.

### Key Action 12.2

To develop further initiatives with the food and drink and arts and crafts sectors particularly in rural areas. This could include local purchasing by both visitors and businesses - NDMB, PS.

### Key Action 12.3

To encourage easier access to the countryside including visits to and use of trails in Tarka Country, in the Ruby Country project and DWT's Confidence in the Countryside initiative - DCC, DWT, RCP, NDCCS, ENP, NT. ,

### Key Action 12.4

To support the Coastal and Market Towns Initiative in rural areas - NDDC, TDC, PS, TAs.

## Objective 13 - To encourage planners and policy makers to take account of tourism

When policies that are being developed and implemented for example in areas such as transport, the environment, culture, sport and rural development it is important that there is a balanced approach to both the needs of residents and visitors.

### Key Action 13.1

To ensure that the interests of tourism are represented in local and regional policy debate - NDMB, NDDC, TDC, DCC, SWT.

### Key Action 13.2

To identify what infrastructure or service improvements are needed to enhance visitors experience and help businesses grow. To provide constructive feedback to public agencies - NDMB, PS, NDEP.

# MINIMISING ENVIRONMENTAL IMPACT AND THE EFFECT ON LOCAL COMMUNITIES

North Devon's greatest tourism asset is the quality and character of the natural and built environment and is, increasingly, the main reason why visitors come to the area. Tourism is capable of delivering both environmental and community benefits but can also cause problems if it exceeds the capacity of the area to absorb it. Traffic congestion in and around Barnstaple is one of the major concerns.

Although North Devon is a large geographical area it is populated by a number of small settlements. Some of the coastal villages can, during peak times, get overloaded which not only causes problems for the local residents but also detracts from the visitor experience.

Businesses themselves can also operate in a way that is much more sustainable and can assist in encouraging a better understanding of local concerns by visitors to the area. A recent study by the ETC on Visitor Attitudes to Sustainable Tourism showed an increasing environmental awareness by visitors so there is an opportunity for businesses to present an image of caring and responsible tourism and may bring new market opportunities.

## Objective 14 - To ease traffic congestion and promote car-free enjoyment of the area

Over 90% of visitors that come to North Devon arrive by car. The rest arrive by coach and bus or via the Tarka Line to Barnstaple. The nearest airports are at Exeter or Bristol. Potentially, there could be a small civil airport established at the old Chivenor airbase that could give direct access into the main tourist areas north of Barnstaple.

There have, in recent years, been worsening problems with traffic congestion centred on Barnstaple and a new proposed by-pass and bridge over the Taw should alleviate this bottleneck benefiting the local community and visitors.

There are a number of facilities in the area that enable visitors to explore the coast and countryside without using their cars such as the Tarka Trail and the proposed Ruby Trails. The Marketing Bureau has initiated an operation that promotes and delivers walking holidays in the area as well as the annual Walking and Cycling Festival.

However, public transport could be improved to provide links with these trails and events and this includes bus services and the Tarka Line rail service.

### Key Action 14.1

To continue to support the construction of the Barnstaple by-pass and downstream bridge - NDMB, NDEP, NDDC, TDC, DCC.

### Key Action 14.2

To promote car-free ways of enjoying the area, especially walking and cycling and use of the Tarka Line and the Ruby Trails - NDMB, DCC, DCRP, WT, RCP.

### Key Action 14.3

To lobby for better bus services including bike buses and more frequent services on the Tarka Line - NDMB, DCC.

### Key Action 14.4

To support the establishment of a civil airport at the old Chivenor airbase - NDMB, NDDC, DCC.

## Objective 15 - To ease pressure on local communities at peak holiday times

On Bank Holidays and certainly during the main Summer Season some of the small coastal villages can come under enormous pressure not only by visitors wanting to get to the beaches but also those wishing to stay on camping or touring caravan sites.

This has resulted in overloaded sewage and water systems and power failures.

It may be difficult to reduce numbers in the main summer season and a peak Bank Holidays in the foreseeable future, even with the emphasis of much of the marketing being off peak/off season. So visitor management strategies and better preparation for influxes of large numbers of visitors at key times would be more realistic.

### Key Action 15.1

To encourage effective visitor management at peak times in key coastal areas - NDDC, TDC, DCC.

## Objective 16 - To encourage good environmental practice

There have been a number of initiatives in recent years aimed at providing practical help and guidance to small businesses on the actions they can take to reduce their impact. Local authorities have much more proactive policies on effective waste management and recycling.

The Green Audit Kit can offer self help in marketing, financial and other benefits for businesses as well as offering a more sustainable approach to tourism. The Envision project provides more concentrated advice on biodiversity, energy efficiency, water saving, wildlife issues, waste and recycling and has been working through the Ruby Country project. SWT has also developed a Green Tourism Business Scheme resulting from a pilot in South Hams District and this may well be available through the Ruby Country project soon. QUEST has similar proposals to make individual businesses much more aware of how to operate in a more sustainable way.

A number of Visitor payback schemes have been tried on Exmoor and through the Tarka project. The development and encouragement of local supply chains can also lessen environmental impact as well as sustaining the local economy.

### Key Action 16.1

To promote sustainable business practices directly by tourism operators, including the Green Audit Kit and encourage a wider take up of environmental schemes such as energy efficiency, water saving, re-cycling, visitor payback etc. - NDDC, TDC, NDMB, ENV, RCP, QUEST, TAs, PS.

### Key Action 16.2

To recognise those businesses that actively engage in sustainable practices, local purchasing etc through various national and local award schemes. - NDMB, RCP, QUEST, SWT.

# QUICK REFERENCE TO STRATEGIC POLICIES AND ACTIONS

## CREATING SUCCESSFUL PUBLIC/PRIVATE SECTOR PARTNERSHIPS

OBJECTIVE	KEY ACTION	RESPONSIBILITY
<b>1. To secure a greater integration of bodies directly associated with the promotion and delivery of tourism</b>	<b>1.1</b> There should be integration of the Marketing Bureau and the Tourism Associations that allows the Marketing Bureau to secure greater representation of the operators in the industry and generate more revenue to use for the marketing of the area. The Marketing Bureau should also be more proactive in selling its services to the industry.	<b>NDMB, TAs</b>
	<b>1.2</b> This relationship should be used to secure the viability and stability of the TICs, improve standards and maximise participation in and returns from Englandnet.	<b>NDMB, TAs, TICs, NDDC TDC, GTCDT</b>
	<b>1.3</b> To continue to explore the potential of a merger with West Somerset and to co-ordinate with the QUEST project.	<b>NDMB, NDDC, TDC, WSDC, ETA, SWT, QST</b>
	<b>1.4</b> To ensure a pro-active presence in the new regional and sub-regional structures - NDMB, SWT.	<b>NDMB, DCC, QST, SWT</b>
<b>2. To increase the integration of tourism with other sectors of the economy</b>	<b>2.1</b> To encourage greater synergy between the Marketing Bureau and the North Devon Chamber of Commerce, Town Centre Managers, the agricultural sector, environmental agencies and trade associations.	<b>NDMB, NDCCI, NDEP, BTCM, ITM</b>

## SELLING MORE HOLIDAYS

OBJECTIVE	KEY ACTION	RESPONSIBILITY
<b>3. To increase awareness of the North Devon brand</b>	<b>3.1</b> To increase the level of marketing expenditure available to the North Devon Marketing Bureau to enable it to raise the level of awareness of North Devon.	<b>NDMB, PS, TAs</b>
	<b>3.2</b> To further develop and promote a clear North Devon brand that accentuates local distinctiveness and is based on consumer understanding and insights. This should include maximising the opportunities offered by the UNESCO World Biosphere status.	<b>NDMB, PS, TAs, DCC, NDCCS</b>
	<b>3.3</b> To encourage the adoption of the brand and its key messages by all sectors of the community to improve the marketing consistency. It should also integrate with county and regional brands.	<b>NDMB, PS, TAs, DCC, SWT</b>
<b>4. To increase the number and value of holidays sold</b>	<b>4.1</b> To identify key products, target markets and customer segments and disseminate to the tourism industry.	<b>NDMB, DCC, SWT</b>
	<b>4.2</b> To provide support to tourism businesses on the development of marketing skills, marketing opportunities and effective use of the internet.	<b>NDMB, NDC, BL, TSN</b>
	<b>4.3</b> To encourage tourism partnerships between accommodation, attractions, activity providers, environmental agencies and events to provide added value incentives to book.	<b>NDMB, PS, DWT, NDCCS, SWF, SWL, CT</b>
	<b>4.4</b> The North Devon Marketing Bureau should investigate the expansion of its packaged holiday operation to include other activities.	<b>NDMB, PS</b>
	<b>4.5</b> To encourage and support the improvement of TIC services to ensure effective out of hours and peak time response systems.	<b>TAs, TICs, TDC, GTCDT, HTC</b>
	<b>4.6</b> North Devon should continue to support DACOM and encourage more operators in the area to also do so.	<b>NDMB, PS, DACOM</b>
	<b>4.7</b> To encourage more businesses to price and process bookings in Euros.	<b>NDMB, PS, DACOM</b>

# QUICK REFERENCE TO STRATEGIC POLICIES AND ACTIONS

## INCREASING THE VALUE OF TOURISM

OBJECTIVE	KEY ACTION	RESPONSIBILITY
<b>4. To increase the number and value of holidays sold (continued)</b>	<b>4.8</b> To support Ilfracombe's participation in the South West Cruise Liners promotion.	<b>NDMB, ITM</b>
	<b>4.9</b> To make local residents aware of the range of opportunities available to VFR including making use of local TICs. (Also see Spreading the Benefit Key Action 11.3).	<b>NDMB, PS</b>
	<b>4.10</b> To undertake promotional activity aimed at bringing more day trippers into the area.	<b>BTCM, ITM</b>
<b>5. To encourage all year round tourism</b>	<b>5.1</b> To encourage the planning authorities to consider longer periods of opening for self - catering accommodation.	<b>NDMB, NDDC, TDC</b>
	<b>5.2</b> To encourage accommodation operators to develop short-break packages linked to activities and/or events.	<b>NDMB, PS, TAs</b>
<b>6. To establish systems of monitoring and understanding changing customer behaviour</b>	<b>6.1</b> To keep destination marketing activity under constant review and adapt it as customers change and new cost effective techniques evolve.	<b>NDMB, DCC, SWT</b>
	<b>6.2</b> To encourage businesses to track and record customer details and obtain feedback via customer research.	<b>NDMB, DCC, SWT, PS</b>
	<b>6.3</b> Monitor trends and disseminate information to businesses and other relevant bodies.	<b>NDMB, DCC, SWT</b>

## IMPROVING THE TOTAL VISITOR EXPERIENCE

OBJECTIVE	KEY ACTION	RESPONSIBILITY
<b>7. To ensure adequate levels of business skills and expertise</b>	<b>7.1</b> To target micro-businesses with appropriate training in core skills e.g. marketing, IT, catering, customer care, quality. This could include the establishment of a permanent Centre of Excellence for small businesses.	<b>NDMB, NDC, NDEA, ES, TSN</b>
	<b>7.2</b> To establish a long-term Mentoring Programme involving successful business operators from key sectors.	<b>NDMB, PS, RDA, NDEA, TSN</b>
	<b>7.3</b> To disseminate information to potential business start-ups into the industry as well as provide actual support to new entrants.	<b>NDMB, TAs, PS, NDEA</b>
	<b>7.4</b> To promote the uptake of national programmes aimed at improving staff skills or business standards e.g. Workbased Learning, Investors in People, Modern Apprenticeships.	<b>NDMB, NDC, ES, PS, TSN</b>
<b>8. To enhance the quality of key products and services</b>	<b>8.1</b> To continue to lobby the Government to enable local delivery of the NQAS.	<b>NDMB, DCC, SWT</b>
	<b>8.2</b> To encourage greater participation in the NQAS by accommodation operators and promote the scheme to visitors.	<b>NDMB, TAs, TICs</b>
	<b>8.3</b> To encourage the further development of 3, 4 and 5 star hotels in the area and particularly in Ilfracombe.	<b>NDMB, NDDC, IDTA, TDC</b>
	<b>8.4</b> To encourage the planning authorities to review implementation of change of use restrictions in Ilfracombe and Woolacombe.	<b>NDMB, NDDC, IDTA, WMTA</b>

# QUICK REFERENCE TO STRATEGIC POLICIES AND ACTIONS

## IMPROVING THE TOTAL VISITOR EXPERIENCE

OBJECTIVE	KEY ACTION	RESPONSIBILITY	
<b>8. To enhance the quality of key products and services</b>	<b>8.5</b> Generally, new accommodation developments, including farm diversifications, should demonstrate a market need and be of high quality.	<b>NDDC, TDC, NDMB</b>	
	<b>8.6</b> To monitor the changes in accommodation stock and the growth of second homes for holiday letting and liaising with the local planning authority.	<b>NDMB, DCC, TDC, NDDC</b>	
	<b>8.7</b> To ensure that leisure facilities, footpaths, cycleways, bridlepaths and general countryside access, cultural facilities, signposting and environmental services meet the needs of visitors.	<b>NDDC, TDC, DCC, ENP, NT, NDCCS, DWT, SWF, SWL</b>	
	<b>8.8</b> To establish an annual forum with relevant environmental agencies to discuss the role and relevance of tourism.	<b>NDMB</b>	
	<b>8.9</b> To encourage and support the improvement in quality of existing attractions, including the beaches, and promote the adoption of a scheme for attraction standards.	<b>NDMB, NDDC, TDC, SWT, PS</b>	
	<b>8.10</b> To give careful consideration to long term viability and the potential for displacement of any proposals for new commercial attractions in North Devon. To be supportive of new attractions that will bring additional visitors to the area.	<b>NDMB, NDDC, TDC</b>	
	<b>8.11</b> To develop and support Events and Festivals of a national standard in the off peak and shoulder season.	<b>NDMB, TDC, NDDC</b>	
	<b>8.12</b> To encourage improved standards of catering in the area through the promotion of awards, training provision and events.	<b>NDMB, NDC, PS</b>	
	<b>8.13</b> To encourage local purchasing of food and drink products by both visitors and businesses.	<b>NDMB, PS, DFL, SFL</b>	
	<b>8.14</b> To ensure that the majority of existing facilities and infrastructure meet the requirements of all visitors with disabilities, whilst all new developments provide the highest level of disabled facilities.	<b>PS, NDDC, TDC</b>	
	<b>8.15</b> To make tourism businesses aware of the physical barriers that impede access and the market opportunities that exist for visitors with disabilities.	<b>NDMB, SWT</b>	
	<b>9. To meet the needs of visitors and potential visitors for information</b>	<b>9.1</b> To maximise the effectiveness of the TIC network in providing information including maximising the opportunities provided by the Englandnet system.	<b>NDMB, TAs, TICs, DCC, SWT, TDC</b>
		<b>9.2</b> To promote and support the effective adoption of e-business by tourism businesses and TICs.	<b>NDMB, TSN, TICs, TDC</b>
		<b>9.3</b> To review the effectiveness of literature distribution systems for attractions and activity providers in the area.	<b>NDMB, PS, TICs, TDC</b>
<b>10. To ensure the effective regeneration of Resorts</b>	<b>10.1</b> To support SWRDA's Market and Coastal Town's Initiative.	<b>NDMB, NDDC, TDC</b>	
	<b>10.2</b> To support the development of holistic plans for resort regeneration.	<b>NDDC, TDC</b>	
	<b>10.3</b> To monitor the changes in bedstock across the area and feedback from related sectors and alert the planning authorities of any impending problems.	<b>NDMB, TAs</b>	

# QUICK REFERENCE TO STRATEGIC POLICIES AND ACTIONS

## SPREADING THE BENEFIT

OBJECTIVE	KEY ACTION	RESPONSIBILITY
<b>11. To improve the local understanding and awareness of the importance of tourism to the community</b>	<b>11.1</b> To continue to support the Economic Partnership and maintain the strategic importance of sustainable tourism in the local economy. This should include establishing clear and credible data on the full economic impact of tourism - NDMB, NDEP, NDDC, TDC, DCC.	<b>NDMB, NDEP, NDDC, TDC, DCC</b>
	<b>11.2</b> To implement a PR strategy to promote the benefits of tourism to local economic, social and environmental development. This includes school and community groups.	<b>NDMB, TAs, TICs</b>
	<b>11.3</b> To promote an annual local open day for residents with attractions, activity providers and TICs.	<b>NDMB, PS, TICs, TAs</b>
	<b>11.4</b> To work with North Devon College Careers and Employment Services to draw attention to career opportunities in tourism and hospitality.	<b>NDMB, ES, NDC</b>
<b>12. To encourage the involvement of other related sectors in the promotion of tourism</b>	<b>12.1</b> To forge closer links between the industry and the retail sector through the local Chambers, Town Centre Managers and other representative bodies.	<b>NDMB, NDCCI, BTCM, ITM, NDEP</b>
	<b>12.2</b> To develop further initiatives with the food and drink and arts and crafts sectors particularly in rural areas. This could include local purchasing by both visitors and businesses.	<b>NDMB, PS</b>
	<b>12.3</b> To encourage easier access to the countryside including visits to and use of trails in Tarka Country in the Ruby Country project and DWT's Confidence in the Countryside initiative.	<b>DCC, DWT, NDCCS, ENP, NT</b>
	<b>12.4</b> To support the Coastal and Market Towns Initiative in rural areas.	<b>NDDC, TDC, PS, TAs</b>
<b>13. To encourage planners and policy makers to take account of tourism</b>	<b>13.1</b> To ensure that the interest of tourism are represented in local and regional policy debate.	<b>NDMB, NDDC, TDC, DCC, SWT</b>
	<b>13.2</b> To identify what infrastructure or service improvements are needed to enhance visitors experience and help businesses grow. To provide constructive feedback to public agencies.	<b>NDMB, PS, NDEP</b>

## MINIMISING ENVIRONMENTAL IMPACT & THE EFFECT ON LOCAL COMMUNITIES

OBJECTIVE	KEY ACTION	RESPONSIBILITY
<b>14. To ease traffic congestion &amp; promote car-free enjoyment of the area</b>	<b>14.1</b> To continue to support the construction of the Barnstaple by-pass and downstream bridge.	<b>NDMB, NDEP, NDDC, TDC, DCC</b>
	<b>14.2</b> To promote car-free ways of enjoying the area, especially walking and cycling and use of the Tarka Line and the Ruby Trails.	<b>NDMB, DCC, DCRP, WT, RCP</b>
	<b>14.3</b> To lobby for better bus services, including bike buses and more frequent services on the Tarka Line.	<b>NDMB, DCC</b>
	<b>14.4</b> To support the establishment of a civil airport at the old Chivenor airbase.	<b>NDMB, NDDC, DCC</b>
<b>15. To ease pressure on local communities at peak holiday times</b>	<b>15.1</b> To encourage effective visitor management at peak times in key coastal areas.	<b>NDDC, TDC, DCC</b>
<b>16. To encourage good environmental practice</b>	<b>16.1</b> To promote sustainable business practices directly by tourism operators including the Green Audit Kit and encourage a wider take up of environmental schemes such as energy efficiency, water saving, re-cycling, visitor payback etc	<b>NDDC, TDC, NDMB, ENV, RCP, QUEST, TAs, PS</b>
	<b>16.2</b> To recognise those businesses that actively engage in sustainable practices, local purchasing etc through various national and local award schemes. - NDMB.	<b>NDMB, RCP, QUEST, SWT</b>

# KEY TO ABBREVIATIONS

<b>BL</b>	Business Link
<b>BTCM</b>	Barnstaple Town Centre Management
<b>DACOM</b>	Devon and Cornwall Overseas Marketing Consortium
<b>DCC</b>	Devon County Council
<b>DCRP</b>	Devon and Cornwall Rail Partnership
<b>DFL</b>	Devon Food Links
<b>DWT</b>	Devon Wildlife Trust
<b>ENP</b>	Exmoor National Park
<b>ENV</b>	Envision
<b>ES</b>	Employment Service
<b>ETA</b>	Exmoor Tourism Association
<b>GTCDT</b>	Great Torrington Community Development Trust
<b>IDTA</b>	Ilfracombe and District Tourism Association
<b>ITM</b>	Ilfracombe Town Management
<b>NDC</b>	North Devon College
<b>NDMB</b>	North Devon Marketing Bureau
<b>NDCCI</b>	North Devon Chamber of Commerce and Industry
<b>NDCCS</b>	Northern Devon Coast and Countryside Service
<b>NDDC</b>	North Devon District Council
<b>NDEA</b>	North Devon Enterprise Agency
<b>NDEP</b>	North Devon Economic Partnership
<b>NT</b>	National Trust
<b>PS</b>	Private Sector
<b>QST</b>	Quality Underpins Exmoor's Sustainable Tourism (QUEST) Project
<b>RCP</b>	Ruby Country Project
<b>RDA</b>	Regional Development Agency
<b>SFL</b>	Somerset Food Links
<b>SWF</b>	South West Forest
<b>SWL</b>	South West Lakes Trust
<b>SWT</b>	South West Tourism
<b>SWW</b>	South West Water
<b>TAs</b>	Tourism Associations
<b>TDC</b>	Torrige District Council
<b>TSN</b>	Tourism Skills Network
<b>WMTA</b>	Woolacombe and Morteheo Tourism Association
<b>WSDC</b>	West Somerset District Council
<b>WT</b>	Wessex Trains

# APPENDIX A

## THE TOURISM ASSETS

### THE NATURAL ENVIRONMENT

**Areas of Outstanding Natural Beauty** - 66 square miles. The North Devon AONB has a number of striking features which include its diversity of coastal scenery, the tall Devon hedgerows, significant belts of woodland notably along the Clovelly coast, together with single trees and tree groups and the scattered historic villages and hamlets which are characteristic of the AONB landscape. The area is divided into five broad character areas: the Hartland peninsula; Bideford Bay coast; Taw Torridge Estuary Mouth; North Devon Downs; and North Devon High Coast. The key features that justify its AONB status include its distinctive coastal scenery with rare features and qualities; the high visual quality of the landscape; its significant wildlife resource and its remarkable heritage

**Heritage Coast** - 80 miles oakwoods, sea cliffs, long sandy beaches and coastal heathland includes the South West Coast Path - the UK's longest National Trail. Includes North Devon Voluntary Marine Nature Reserve.

**Beaches** - Blue Flag/ Seaside Award beaches.

**Exmoor National Park** - About 1/3 in North Devon, 700 miles of footpaths and bridleways, wildlife and historic sites.

**Taw Torridge Estuary** - Exceptional nature conservation interest including UNESCO International Biosphere, RSPB reserve.

**Lundy Island** - National Marine Nature Reserve, SSSI.

**Tarka Trail/National Cycle Network/Coast to Coast** - Extensively developed cycling and walking routes.

**Two Moors Way** - Footpath that starts at Lynmouth and joins Exmoor with Dartmoor.

**Culm Grasslands** - A rich and diverse grassland that is found only on the western fringes of Europe. The North Devon area contains 4000ha of this habitat that relies on traditional farming methods for its continued existence.

### THE BUILT ENVIRONMENT

The area has a wealth of listed buildings, historic harbours, scheduled ancient monuments and notable parks and gardens. The coastal resorts are the traditional centres for tourism and contain approximately 80% of the accommodation stock in the area. However, they have all lost bedspaces in recent years and some of the key resorts are in need of investment. The rural hinterland covers nearly 800 square miles of countryside comprising many pretty market towns, villages and agricultural holdings. Many farms have recently diversified into tourism both in accommodation and attractions. However, the rural areas are remote and often difficult to access because of poor transport infrastructure. The two largest commercial centres are Barnstaple and Bideford. Although both originally ports only Bideford is still active. In recent years Barnstaple has seen extensive commercial and retail development as well as retaining its traditional Pannier Market and heritage facilities. Bideford is planning to develop its maritime and ceramic heritage connections as part of a co-ordinated and comprehensive regeneration scheme for the town.

### TOURIST ATTRACTIONS

North Devon has over 30 paid entry visitor attractions.

The Lynton and Lynmouth Cliff Railway (585,678) and Clovelly Village (213,000) rank amongst the most visited attractions in Devon.

Many of the family attractions have emerged from farm diversifications - Milky Way, Big Sheep, North Devon Farm Park, Exmoor Zoo - and there are others in the mix - Watermouth Castle, Combe Martin Wildlife Park, Once Upon a Time, Ilfracombe Aquarium, Quince Honey Farm, Tunnels Beaches.

Heritage based attractions include NT's Arlington Court, Tapeley Park, Hartland Abbey, Torrington 1646, Chambercombe Manor as well as numerous local heritage centres and museums.

The area has a particularly strong selection of gardens led by RHS Rosemoor, Marwood, Docton Mill.

Two visitor centres are based on local manufacturing at Brannams Pottery and Dartington Crystal. There are some with specialist interest Cobbaton Combat Museum, Barometer World, Broomhill Sculpture Gardens Gnome Reserve.

The one truly unique attraction in the area is Lundy - the island also contains accommodation.

### OUTDOOR ACTIVITIES

**Watersports:** surfing, kite surfing, windsurfing with supporting businesses - surf-board manufacture, surf-hire, surf schools and retail. Limited sailing on the estuary. Inland opportunities on Tamar Lakes. **Walking:** SWCP, Tarka Trail, Two Moors Way, ENP. **Cycling Tarka Trail:** Developing Ruby Trails and Coast to Coast/NCN Sustrans routes and supporting cycle hire operators. **Horse Riding:** numerous stables on coast as well as on ENP. **Golf:** 12 Courses or ranges including Championship Course at Saunton and historic Royal North Devon. **Fishing:** Fishing Lakes, River Fishing, Sea Fishing. **Activity Centres:** Skern Lodge, PGL, Knapp House, Key Pitts. **Lundy:** Diving, rock climbing, bird watching. **Disabled Activities:** Specialist centre at Calvert Trust - horse riding, climbing, sailing, woodland recreation.

# APPENDIX A

## THE TOURISM ASSETS

### EVENTS, FESTIVALS AND CRAFTS

**North Devon and Exmoor Walking Festival** - May

**Ilfracombe Beer Festival** - May

**Ceramic Arts Festival** - May/June

**Appledore Arts Festival**

**Great Torrington Music and Arts Festival**

**North Devon Festival** - June

**GoldCoast Ocean Festival** - June

**Ilfracombe Victorian Celebrations** - June

**Lights in Your Eyes/Dreamwalk** - August

**RHS Rosemoor Autumn Festival** - September/October

**Devon Food & Drink Festival** - October

**Bideford New Year's Eve**

**Local Traditions** - Hunting of the Earl of Rone, Combe Martin; Potwalloping, Westward Ho!; Torrington May Fair; Pilton Green Man Festival, Holsworthy Pretty Maid.

### RETAIL, CATERING AND OTHER LEISURE FACILITIES

**Panniers Markets** - Barnstaple, Bideford, South Molton, Torrington

**Holsworthy Weekly Market**

**Green Lanes**, Barnstaple

**Atlantic Village**, Bideford

**Pubs, cafes, tea rooms, restaurants**

**North Devon Leisure Centre**

**Tarka Tennis Centre**

**Local Swimming Pools**

# APPENDIX B

## TOURISM TRENDS ANALYSIS 1986-2002

The data presented in the following analysis is taken from four main sources:

- 1. Devon County Council's 'Tourism Trends in Devon'**  
- an annual survey of accommodation providers across the county. There are certain anomalies in the way the data has been collected each year as well as obvious seasonal factors that influence tourism. However, by using such a long period in the analysis it is hoped that any inconsistencies in the data can be minimised.
- 2. The Cambridge Model**  
Using data from 2001, the Cambridge Model assesses the full economic impact of tourism including estimates of day visitor expenditure and multiplier effects throughout the economy.
- 3. North Devon Marketing Bureau's telephone research 1997-1999**  
Over a three year period information was collected from 15,000 individuals that had made enquiries for the North Devon Guide.
- 4. North Devon Marketing Bureau database of enquirers**  
From the names and addresses of enquirers it has been possible to identify geographic source and socio-economic details of visitors.

It focuses on the following trends:

**Changes in the bedstock** by accommodation type including that in individual destinations. The four accommodation types are Serviced (Hotels and Guest Houses), Flats & Houses (inc cottages), Holiday Park Units (chalets, statics) and Touring (inc camping). There will also be an analysis of the quality of bedstock in the area compared to the regional position.

**Changes in tourist nights** by accommodation type and district. Tourist night figures do include a proportion for visitors who stay in private homes, usually friends and relatives. However, this category is not analysed separately because it is not collected as part of the DCC Survey but calculated by using a standard percentage.

**Changes in tourism expenditure** by accommodation type and district.

**Changes in market share** within Devon by district.

**Changes in peak of season and occupancy rates.**

Using the Cambridge Model and data from the 2001 Census the analysis also assesses the **second homes** issue.

It will also provide key data on the **type of visitor** that comes to the area, where they come from and other holiday taking characteristics e.g. length of stay.

The analysis concludes with an assessment of the main **competitors** in the domestic market.

A full report, which also separates out data into the North Devon District Council area and the Torridge District Council area, is available as a separate document

**"North Devon Tourism Trends 1986-2002".**

### Bedstock and Quality

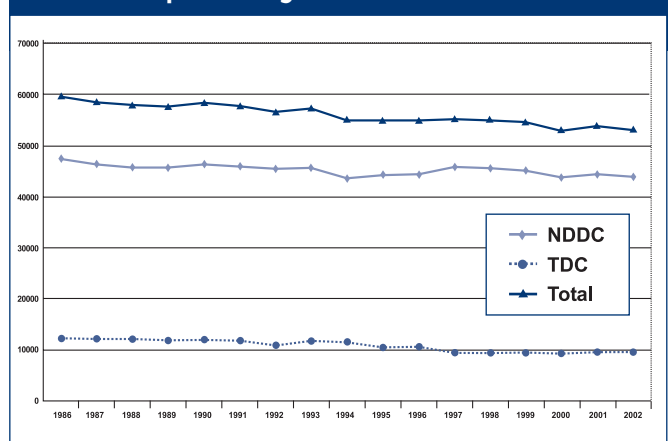
North Devon is one of the largest tourism destinations in the UK with regard to the volume of accommodation (53,000 bedspaces). It has a stock equivalent to major destinations such as Scarborough, Torbay and Newquay and more than twice that

of such resorts as Bournemouth. There is estimated to be nearly 1,400 accommodation operators in the area.

Different forms of self-catering (Flats & Houses, Holiday Parks, Touring/Camping) account for 77% of the stock whilst 23% is in serviced (Hotels, Guest Houses, B&Bs, Inns). However, self-catering only accounts for 38% (528) of the number of operators although there are estimated to be as many as 800 additional properties in the hands of self catering agencies in the area. There are 757 operators of hotels or guest accommodation. Since 1986 there has been a net loss in stock of 11% (6,390 beds). The two resorts of Ilfracombe (-3,660 beds) and Westward Ho! (-3,760 beds) have seen the largest decreases albeit mostly serviced in the former and holiday park units in the latter. Across the area the loss has been in Touring (-3,800 beds), Holiday Parks (-1,620 beds) and Serviced (-1,330 beds). The only growth in stock has been in Flats and Houses (+ 360 beds). Outside the resorts the general stock has been rising (+ 790 beds).

All the resorts have seen a fall in serviced accommodation - Ilfracombe (-32%), Woolacombe (-26%) and Combe Martin (-46%). There has also been a fall in Flats and Houses stock in these resorts perhaps indicating that the serviced accommodation is not being transformed into commercial self catering but is being 'lost' to private ownership. There has been a small growth in serviced stock (+430 beds) outside the resorts.

Total Bedspace Change in North Devon 1986 - 2002



### Quality Gradings

Overall, 26% of accommodation operators in North Devon have a nationally recognised grading with the ETC/AA/RAC. This is 10% lower than the regional average. All sectors have low levels of participation in the schemes. The serviced sector (24%) and holiday and touring parks (24%) are the lowest compared with the regional average. However, self-catering has achieved higher than average number of 3 and 4 star ratings than the regional average. The serviced guest accommodation has more 4 and 5 diamond properties than average but the larger hotel sector falls short on the number achieving 3 or 4 stars.

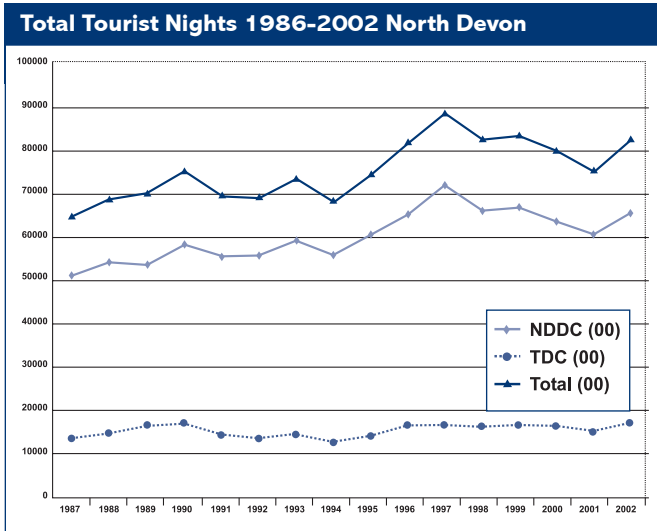
# APPENDIX B

## TOURISM TRENDS ANALYSIS 1986-2002

### Tourist Nights

In 2002 there was a total of 8.2 million tourist nights in the area and with an average length of stay of five nights this equates to a overnight stay visitor population of 1.6 million.

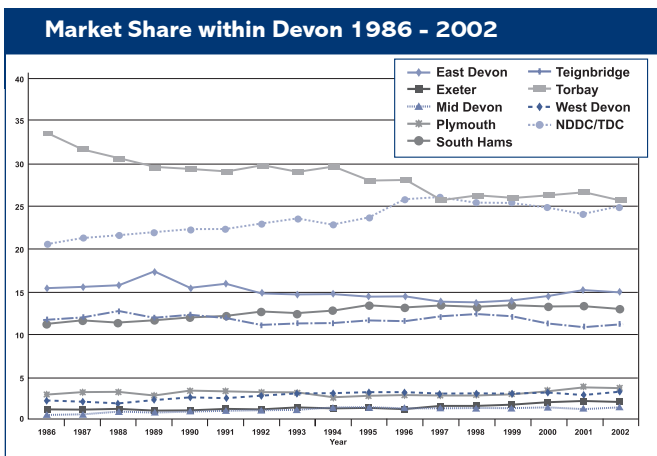
The Cambridge Model estimates that there are 7.6 million day trips into the area each year.



The area has seen a growth in tourist nights since 1986 of 2.1 million nights (+35%) although it has been declining since the record high in 1997. SWT estimate that since 1989 there has been a growth of 3% across the region - North Devon has experienced a growth of 14% over the same period. Since 1996 the annual average number of nights has been 8.2 million. In the seven years before that it was only 7.1 million.

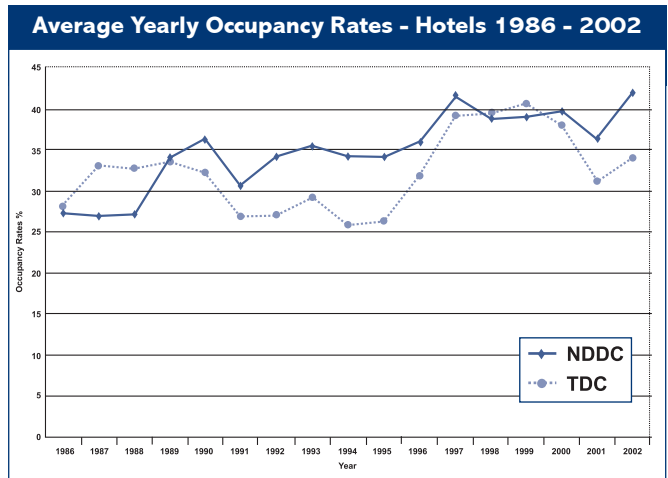
The increase has occurred across all sectors, despite the contraction in accommodation stock, but the largest growth has been in the Holiday Parks (+603,550 nights) followed by Flats and Houses (+431,000 nights) Touring (+356,300 nights) and Serviced (+249,950 nights). An estimated 20% of visitors to the area stay with friends or relatives and don't use commercial accommodation.

The **market share** compared to the rest of Devon has also increased and for a brief time in 1997 amounted to 26%, putting North Devon at the top of the county table and overtaking Torbay for the first time since records began. In 2002, it amounted to 24.9% of Devon's tourist nights.



Although the **peak of season** trend fluctuated during this period it had, by 2002, returned to a level equivalent to the start of the period suggesting that the additional nights are occurring in the shoulder season months. Research into time of visit shows that 95% of visits take place between April and October so the season has become fuller and has not extended substantially outside that period.

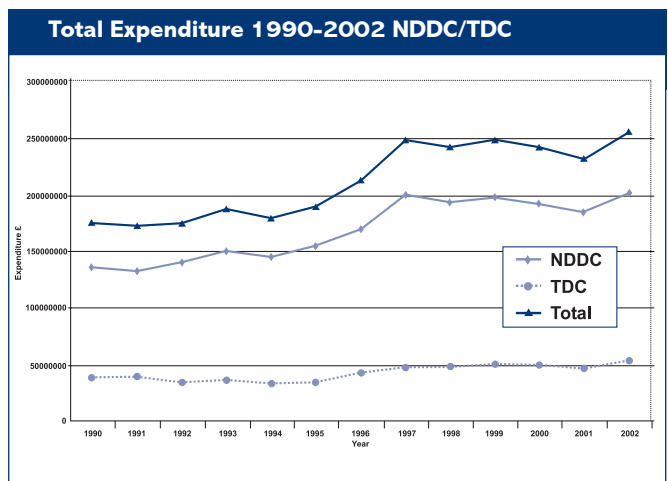
**Occupancy rate** data shows that the serviced sector has, overall, experienced increases in occupancy but primarily in the early and late season whilst the main two holiday months of July and August have fluctuated but overall have remained static compared to the beginning of period.



The influence of self-catering is also demonstrated by the **length of stay** research, which shows that the majority of visitors (54%) still come to the area for seven nights or more. The average length of stay across all accommodation is just over five nights whereas the regional average is only 3.8 nights.

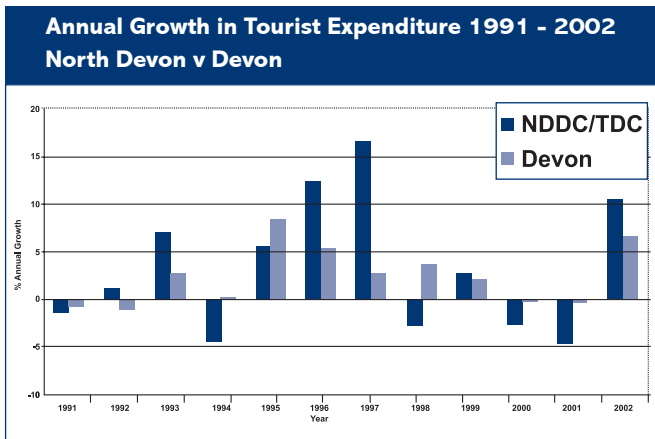
### Tourist Expenditure

In 2002, the DCC Survey estimates that visitors spent £255 million and since 1990 North Devon has experienced an average annual growth in tourist expenditure of 3.4%. This compares favourably with growth at a County level of only 2.5%.



## APPENDIX B

# TOURISM TRENDS ANALYSIS 1986 - 2002



The amount of income earned from serviced accommodation as a proportion of the whole has decreased across the area although it is still the largest single sector with £81 million in 2002 followed by Holiday Park Units (£67m), Flats and Houses (£30m) and Touring (£24m). A further £52m is estimated to be spent by people visiting friends and relations in the area.

The Cambridge Model estimates that day trippers spend a further £169 million in the area each year.

### Second Homes

Based on 1991 Census figures the Cambridge Model estimates that there are approximately 700 units that can be classified as second homes in the area. It goes on to estimate that they generate £1.4 million of expenditure. However, early calculations from the 2001 Census show that the total number may now be nearer 2000 properties (about 3% of total residential properties in the area). Transposing the increased units into the Cambridge Model would give an updated visitor expenditure of £3.9 million.

**One of the concerns is that most of the expenditure by visitors staying in second homes goes to owners outside the area. However, this may be offset by:**

- (i) Visitor expenditure occurs across a range of services other than the accommodation itself e.g. retail, catering this would tend to be retained in the area.
- (ii) Expenditure by home owners locally on rates, services (housekeepers, gardeners), maintenance and replacement of furniture and fittings. The Cambridge Model estimates £750 per property although local estimates put it at a much higher level nearer £2,000.
- (iii) Empirical evidence from self catering agencies suggests that as many as half the second homeowners renting out property for commercial purposes actually live in the area anyway.

This suggests that there may be a net economic gain from second homes although they tend to be highly concentrated in small communities on the coast such as Woolacombe, Croyde and Combe Martin. This is reducing the critical mass of commercial stock that supports other secondary tourism businesses in the villages such as retail and catering. Plus the social issue around the availability of affordable housing is still a concern.

### Visitor Characteristics

The typical visitor to North Devon is either a prosperous middle-aged couple or an affluent white-collar family that comes from the South East or the Midlands. It is interesting to note that there is a large proportion of visitors (18.18%) that originate from the region itself, although cross tabulations show that these are mainly from the 'far reaches' of the South West - Gloucester, Swindon, Bath and Bristol. The average length of stay is about five nights with over half of them staying for seven nights or more.

### Overseas Visitors

The Cambridge Model estimates that overseas visitors account for 578,000 bednights and £21 million of expenditure each year. This is approximately 16% of the market in Devon. Most foreign visitors to North Devon come from Holland or Germany.

### North Devon's Main Competitors

The surveys undertaken by NDMB of enquirers for the North Devon Guide 1997-1999 also ascertained, if North Devon wasn't the chosen destination that year, where they actually did go for their main holiday. The vast majority visited either other coastal locations in parts of Devon, Cornwall or Somerset. Other resort destinations in the South West such as Bournemouth and Weymouth were also popular as well as wider afield Great Yarmouth, Blackpool and the Isle of Wight.

Interestingly in the UK generally, Wales, Scotland, the Lake District, the Cotswolds and the Yorkshire Dales were also popular alternatives perhaps indicating that North Devon does have an attraction for visitors who may be looking for holidays other than those in traditional coastal areas.

The 1999 survey also revealed that nearly 20% chose a holiday abroad instead, indicating that North Devon does feature as a potential alternative for the main holiday.

# APPENDIX C

## STRATEGIC CONTEXT

STRATEGIC THEME	STRATEGIC BODY	STRATEGY	KEY RECOMMENDATIONS/INITIATIVES
Tourism	European Union	Framing the Future of European Tourism (2001)	<ul style="list-style-type: none"> <li>Promoting dialogue with the tourism industry and other interested parties.</li> <li>Fostering networking services and support functions.</li> <li>Ensuring good use of the EU's financial and non-financial instruments.</li> <li>Promoting sustainable development and implementing "Agenda 21" guidelines.</li> <li>Devising indicators and bench-marking for monitoring tourist destinations and services.</li> </ul>
		SW England Objective 2 SPD 2000-2006	<ul style="list-style-type: none"> <li>That the local economies dependent on tourism, agriculture and fisheries sectors in the South West Objective 2 area have been facing increasing competitive pressures, with evidence of decline in employment and the business base over the last five years.</li> <li>That this rationalisation can be reversed, with support, to exploit new market opportunities and broaden the dependence on traditional markets and sources of custom.</li> <li>That each sector is crucial for the future prosperity of the Objective 2 area and, with appropriate assistance to overcome the relevant constraints, can provide significant employment opportunities.</li> </ul>
	ETC/SWT	Tomorrows Tourism /2020 - A Tourism Strategy for the South West	<ul style="list-style-type: none"> <li>Developing tourism in a sustainable way protecting the environment and respecting the concerns of local communities.</li> <li>Improving the quality of the product and being more customer focused.</li> <li>Improving the delivery and co-ordination of marketing.</li> <li>Exploring the use of IT in delivering information and services and improving marketing information.</li> <li>Improving access to tourism for all sectors of the community.</li> <li>Improving the image of the industry.</li> </ul>
	SWT	Towards 2015	<ul style="list-style-type: none"> <li>Driving Up Quality and the competitiveness of businesses in South West England to increase value and respond to changing demands of our existing visitors and new visitors</li> <li>Delivering truly sustainable tourism in order that tourism can continue to be a key sector of the SW economy for decades to come. Sustainable tourism is about the interaction between the needs of the visitor, industry, community and environment."</li> <li>Creating regional and destination management arrangements for the South West that are second to none for effective marketing and tourism development, in order to deliver the maximum benefit for the industry and the region.</li> </ul>

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	Devon County Council	Tourism - Everybody's Business	<ul style="list-style-type: none"> <li>• Generates jobs and creates business opportunities.</li> <li>• Diversifies and supports the local economy.</li> <li>• Adds to the variety of local life and widens opportunities. The importance of partnership working in deliverance of the strategy and emphasises the key roles of the local authorities in promoting their areas for tourism and providing tourist culture and recreation.</li> <li>• Offers a rewarding experience for the visitor and creates a positive image of Devon.</li> <li>• Draws on the environmental quality of Devon and celebrates its distinctive character.</li> </ul>
	Torrige District Council	Tourism Development Strategy	<ul style="list-style-type: none"> <li>• Growth and development of sustainable tourism.</li> <li>• A high quality experience for all visitors to the area.</li> <li>• The maximum benefit to the people and businesses of Torrige.</li> <li>• To have adequate knowledge of our visitors, their needs and the product we offer and continually seek to find new niche markets to target.</li> <li>• To support the development of sustainable initiatives that spread economic benefit throughout the area and extend the tourist season.</li> <li>• To ensure the preservation and enhancement of the environment of the area as a distinctive asset.</li> <li>• To work together in partnerships to achieve and spread quality throughout the area, improving Torrige's image.</li> <li>• To provide sufficient and comprehensive information to both potential and staying visitors about the area and what it offers.</li> <li>• To maximise the economic benefits of tourism to the District.</li> <li>• To raise awareness of external funding sources and develop joint initiatives to optimise benefits of Torrige.</li> </ul>
<b>Sustainable Tourism</b>	TMI	Destination Management - A Sustainable Approach VICE Model	<ul style="list-style-type: none"> <li>• Communicate a sense of stewardship in all VISITORS, welcome them and fulfil their expectations</li> <li>• Work with INDUSTRY to provide high quality, environmentally aware services and facilities and market them to appropriate audiences throughout the year</li> <li>• Empower the local COMMUNITY especially young people, and create ownership through involvement in tourism matters</li> <li>• Promote a better understanding of the ENVIRONMENT and manage all tourism development in a way that where possible, it has a positive effect on its surroundings and local resources.</li> </ul>

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## STRATEGIC CONTEXT

STRATEGIC THEME	STRATEGIC BODY	STRATEGY	KEY RECOMMENDATIONS/INITIATIVES
	SW Regional Assembly	A Sustainable Future for the South West: Theme 14: Tourism	<ul style="list-style-type: none"> <li>Continuing to show that the economy depends on high quality environment</li> <li>Tackling the biggest Issue - Transport: Extending the Season</li> <li>Minimising Visitor Impacts</li> <li>Local Produce, tourism and the local economy: Greening Accommodation and attractions - business and environmental benefits: Involving the community Improving information</li> </ul>
	Local Agenda 21	Guiding Principles	<ul style="list-style-type: none"> <li>resources are used efficiently and waste is minimised;</li> <li>pollution is limited to levels which natural systems can cope with without damage;</li> <li>the diversity of nature is valued and protected; where possible local needs are met locally;</li> <li>everyone has access to good food, water, shelter and fuel at a reasonable cost;</li> <li>everyone has the opportunity to undertake satisfying work in a diverse economy;</li> <li>people's good health is protected;</li> <li>access to facilities, goods, services and other people is not achieved at the expense of the environment;</li> <li>people live without fear of personal violence from crime or persecution; everyone has access to skills, knowledge and information;</li> <li>all sections of the community are empowered to take part in decision making;</li> <li>opportunities for culture leisure and recreation are readily available to all;</li> <li>diversity and local distinctiveness are valued and protected.</li> </ul>
	NDDC	North Devon First Community Strategy	<ul style="list-style-type: none"> <li>Encourage a prosperous, developing, sustainable economy</li> <li>Create Equal Opportunity for all</li> <li>Protect our high quality urban and rural environment as our greatest asset</li> <li>Enhance our distinctive cultural and environmental assets for the benefit of residents and visitors alike.</li> <li>Work together, listening to and valuing residents views and involving informing and engaging people in fulfilling the vision</li> <li>Develop public, voluntary and private sector services through planning jointly for the future.</li> </ul>

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## STRATEGIC CONTEXT

STRATEGIC THEME	STRATEGIC BODY	STRATEGY	KEY RECOMMENDATIONS/INITIATIVES
<b>Cultural</b>	Cultural SW	In Search of Chunky Dunsters	<ol style="list-style-type: none"> <li>1. Encouraging increased access to and participation in cultural activities across the South West, capitalising on the latest developments in Information and Communications Technology (ICT) business base over the last five years.</li> <li>2. Improving the quality and relevance of the Region's cultural activities.</li> <li>3. Supporting the South West's cultural and creative industries and nurturing creativity.</li> <li>4. Celebrating regional identity and the rich diversity of South West cultural life and traditions.</li> </ol>
	NDDC/TDC	Local Cultural Strategy for Northern Devon 2000-2005	<p><i>'A distinctive Northern Devon cultural sector which helps secure a sustainable quality of life and environment, and supports all aspects of community development.'</i></p> <ul style="list-style-type: none"> <li>• Improving access, inclusion in participation and enjoyment of cultural activity.</li> <li>• Improving the quality and relevance of cultural services.</li> <li>• Promoting regeneration, sustainability and healthy living.</li> <li>• To ensure that cultural resources support lifelong learning.</li> </ul>
<b>Economic Development</b>	SWRDA		<p>The South West Regional Development Agency takes on a lead role in tourism strategy and funding in the region from April 2003. In 2001, it supported the tourism revival following the Foot and Mouth crisis with £1 million investment to allow a widespread regional tourism marketing campaign and as part of a new branding exercise is putting a further £2-3 million into promotion of the South West in conjunction with SWT.</p> <ul style="list-style-type: none"> <li>• Market and Coastal Towns</li> <li>• Rural Renaissance</li> <li>• Building Communities</li> <li>• New Millennium Workspace</li> <li>• Civic Pride</li> <li>• Sustaining Land Resources</li> <li>• Sustainable Communities</li> <li>• South West TASC</li> </ul>
	England Rural Development Programme	Rural Enterprise Scheme	<p>It is intended that the ERDP will play a major role in helping rural businesses recover from the effects of the Foot and Mouth Crisis. £1.6bn will be available to farmers over the next seven years for environmental protection and improvement and rural development. In particular the Rural Enterprise Scheme offers a range of activities designed to help farmers develop their businesses within the local economy, and to provide wider benefits for rural communities and the environment.</p>

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STRATEGIC THEME	STRATEGIC BODY	STRATEGY	KEY RECOMMENDATIONS/INITIATIVES
<b>Economic Development</b>	North West Devon	NWDEP Strategy Economic Partnership 2000-2006	The tourism sector accounts for up to a third of local GDP and can act as a driver of change. The establishment of the North Devon Marketing Bureau...was a major step forward in integrating tourism marketing and development in the area. There is an opportunity to move ahead through the preparation of a Tourism Strategy and through links with other sectors in farming, manufacturing, retailing and leisure activities.
	North Devon & Exmoor Regeneration Company		Integrated Area Plan for Northern Devon and West Somerset Leader + Face2Face IT Project
<b>Structure Plans</b>	Devon County Council	Structure Plan 1995-2011	<ul style="list-style-type: none"> <li>Increasing the contribution of the tourism industry to the Devon Economy whilst not detracting from the County's environment.</li> <li>Supporting the development of tourism and recreation facilities that promote the principles of sustainability.</li> <li>Retaining and securing provision for sports and informal outdoor recreation at an appropriate scale, and in appropriate locations, in order to meet the needs of all residents and visitors.</li> </ul> <p>It is also clear in identifying the potential conflict between tourism and the environment and clearly states that this partnership needs to be carefully managed.</p> <p>It is stated that future developments in the tourism industry should be focused on lengthening the tourist season and improving the quality of the product in terms of accommodation and leisure and recreation facilities. Benefits to the economy should be maximised and environmental disadvantages minimised.</p>
	Torrige DC	Local Plan	<p>The Plan states that main holiday and tourist areas should be protected from harmful development. Areas identified are as follows:</p> <ul style="list-style-type: none"> <li>The coastal resort of Westward Ho!</li> <li>The main settlements (Principal urban area of Bideford/Northam including Appledore, plus Great Torrington and Holsworthy).</li> <li>The North Devon Area of Outstanding Natural Beauty and the Coastal Zone.</li> <li>Rest of the rural area.</li> </ul> <p>The key tourism objectives of the plan are:</p> <ul style="list-style-type: none"> <li>To focus tourism development on the resort of Westward Ho!</li> <li>To identify key tourism development opportunities in the resort and the Area Centres.</li> <li>To set clear criteria for the types of sustainable tourism development defined in the Structure Plan.</li> </ul>

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STRATEGIC THEME	STRATEGIC BODY	STRATEGY	KEY RECOMMENDATIONS/INITIATIVES
<b>Structure Plans</b>	Torridge DC continued	Local Plan	<ul style="list-style-type: none"> <li>To enable appropriate tourism initiatives in an environmentally acceptable way across the District.</li> <li>To introduce positive policies for expansion of the countryside recreation network.</li> <li>To conserve the quality and character of the countryside while ensuring good design in development.</li> </ul>
	North Devon District Council	Local Plan	<p>States that priority will be given to <i>“improving the quality of accommodation and facilities, particularly where this encourages “green” or sustainable forms of tourism and a lengthening of the holiday season.”</i></p> <p>It also identifies policies for specific types of accommodation and tourist attractions.</p> <ul style="list-style-type: none"> <li><b>Serviced Accommodation</b> - New proposals for hotels or guest houses should generally be located within Ilfracombe, Combe Martin and Woolacombe but may also be acceptable in Barnstaple, Braunton and South Molton especially if they have conference and on-site leisure facilities available to the wider community or are associated with an existing recreational facility or involve the conversion of a large country house.</li> </ul>
	North Devon District Council	Local Plan	<ul style="list-style-type: none"> <li><b>Self Catering</b> - new proposals should generally be located in Ilfracombe, Combe Martin and Woolacombe although will be allowed as part of a farm diversification or in association with a recreational facility.</li> <li><b>Caravanning and Camping</b> - the emphasis in the AONB, Heritage Coast and CPA should be on improving the overall quality of sites. In inland locations additional sites may be permitted subject to their impact on the environment and local highway network. Any new sites need to show a proven need based on inadequate provision in comparison to known demand. In all forms of self-catering the Local Plan favours schemes that improve the visual quality of the sites and upgrading the standards, including provision for the mobility impaired.</li> <li><b>Visitor Attractions</b> - new developments maybe acceptable in Combe Martin or Woolacombe whilst proposals for other areas of the district must show a direct relationship with the rural environment or heritage. These may include farm related ventures, casual outdoor activities, historic houses and interpretation centres. Facilities linked to recreational trails may also be acceptable. Proposals for large scale developments will only be permitted in exceptional circumstances where it clearly provides a valuable asset to the tourist industry and contributes to the economy of the South West Region in general.</li> </ul>

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STRATEGIC THEME	STRATEGIC BODY	STRATEGY	KEY RECOMMENDATIONS/INITIATIVES
<b>Skill Development</b>	Tourism Skills Network	Tourism Sector Workforce	<ul style="list-style-type: none"> <li>• Engaging Employers.</li> <li>• Enhancing the image of tourism as a career/ job choice.</li> <li>• To work closely with schools, colleges and universities to ensure course accurately reflect the skill needs of the industry.</li> <li>• To source and develop industry specific training that is cost effective, relevant and accessible</li> <li>• To support the industry in developing good recruitment and retention practices.</li> <li>• To improve standards across all sectors of the industry.</li> <li>• To develop the skills of volunteers working in the industry.</li> <li>• To provide tourism businesses with the skills and knowledge to participate in sustainable operating practices.</li> <li>• To represent the region on tourism related skills issues and link with national initiatives.</li> <li>• Trade and professional bodies and skills and learning agencies to share best practice.</li> </ul>
<b>Environmental</b>	North Devon AONB	Vision for 2024	<ul style="list-style-type: none"> <li>• An enhanced landscape that remains as one of Englands finest landscapes</li> <li>• An area where people live more efficiently within the footprint of the AONB in terms of resources taken out of the area</li> <li>• A place where the links between the agricultural landscape and its function as a tourism asset are clearly understood and the sectors are mutually supportive</li> <li>• A place where land management is carried out in an integrated way to create quality produce that is regarded with pride by the local made in ways that support the the area</li> <li>• Host to a community that is thriving both within the villages and in the rural area supporting family based farming that may, in places, be supported directly by the community around them</li> <li>• An area where international and national nature conservation and geological sites are in favourable condition and are used as best examples of conservation management, research and education</li> <li>• A place where the community actively participates in the management of the area by identifying and helping deliver solutions</li> <li>• A place where people will travel around the area in a manner that makes as little impact as possible and traffic pressures are no higher than they are today</li> </ul>

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