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Overview and Scrutiny  
Town Hall  
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Torquay  
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Dear Member

**OVERVIEW AND SCRUTINY BOARD - WEDNESDAY, 11 OCTOBER 2017**

I am now able to enclose, for consideration at the Overview and Scrutiny Board to be held on Wednesday, 11 October 2017, the following reports that were unavailable when the agenda was printed.

<b>Agenda No</b>	<b>Item</b>	<b>Page</b>
5.	<b>Update of Torbay Economic Strategy</b>	(Pages 2 - 21)
6.	<b>Addressing the Challenges of Coastal Communities</b>	(Pages 22 - 32)

Yours sincerely

Kate Spencer  
Overview and Scrutiny Lead



2017-2021

# English Riviera Destination Management Plan

Delivering a Prosperous and Healthy Torbay





# CONTENTS

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INTRODUCTION .....	4
EXECUTIVE SUMMARY .....	5
Context .....	6
The Visitor Economy and Market .....	6
The Tourism Product .....	6
Policy Context.....	7
Destination Management, Organisation and Marketing .....	7
Future Challenges and Trends .....	8
Objectives.....	12
Objective and Targeted Actions .....	12
Priorities .....	12
Outcomes .....	13
Action Plan .....	15
Priority 1: Partnership Working.....	15
Priority 2: Product Development.....	15
Priority 3: Market Development and Communication .....	16
Priority 4: Developing the Destination .....	17
Priority 5: Visitor Experience .....	18
Priority 6: Skills and Business Development .....	19

# INTRODUCTION

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Torbay, the English Riviera, is a leading UK seaside holiday destination. This Destination Management Plan<sup>1</sup> (DMP) brings the management of the destination together. It aims to provide a shared approach to ensure the whole destination and its tourism businesses are supported and developed. Focussing on developing a successful visitor economy, the Plan presents clear actions and the different stakeholders involved to take Torbay, as a destination, forward. The Plan will align collaborative effort, reduce duplication and maximise local investment.

The Plan builds on the success of the *Turning the Tide for Tourism in Torbay Strategy*:

- 12% increase in UK visitors with an 8% increase in spend and 1% increase in overseas visitors.<sup>2</sup>
- Achieved UNESCO Global Geopark status, based on the English Riviera's outstanding internationally significant geological and cultural heritage.
- Delivery of the new South Devon Highway, improving visitor journey times and travel experiences.
- Charitable status obtained for the Agatha Christie Festival, securing Arts Council funding for international development.
- Increased private investment in product development including the refurbishments of hotels improving the quality of accommodation from 2\* to 3\*, increased the number of quality 5\* Boutique B&Bs, development of three new Premier Inns and new 5\* boutique spa beach huts.
- Achieved and maintained Purple Flag status for the destination's night time economy and Blue Flag and Beach Awards status.
- The future of destination marketing secured through the establishment of the new English Riviera Tourism BID Company.
- 'The English Riviera, South Devon's Beautiful Bay' widely adopted across the resort
- New high quality restaurants, cafés and bars, including the popular Abbey Sands development.
- More berths for leisure vessels in Torquay Harbour and new cycle routes have been introduced.

Moving forward, the DMP will make more use of the area's natural and cultural assets to develop an all year round destination offer, define compelling marketing messages and new products to reach new International and domestic visitors; increasing the quality of the tourism offer and maintaining the resort's position as a leading South West coastal destination.

The DMP 2017-2021 is underpinned by extensive consultation which has invited tourism stakeholders across the private and public sector locally to share their views. TDA, on behalf of Torbay Council, has also conducted a wide range of research to support the Plan which has been published as Supporting Evidence.

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<sup>1</sup> A DMP is a concept and shared approach to effectively manage the whole tourism destination. VisitEngland VisitBritain sees the development of Destination Management Plans, which are increasingly being introduced across regions, as an essential tool further supporting Government policy, encouraging destination organisations to become focussed and efficient.

<sup>2</sup> 2010:2015 comparison English Riviera visitor data

# EXECUTIVE SUMMARY

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The English Riviera as a leading UK coastal resort faces an exciting future. Since 2010, when the previous Tourism Strategy was approved, both staying domestic visitors and day visitor numbers have increased, supported by year-on-year visitor spend.

The following achievements have been made since the 2010-2015 Turning the Tide Strategy was approved:



Tourism remains a key sector for Torbay and this DMP sets out how we aim to develop the place to meet the needs of today's and tomorrow's visitors. Whilst the summer season remains important for the industry and its visitors, many of whom are returning visitors, seizing on new opportunities and new markets to attract new visitors all year round is the ambition of this Plan. More specifically, the Plan seeks to:

- Increase year round growth in numbers for UK domestic and international visitors
- Extend the current season beyond the school holidays
- Attract new international and UK visitors
- Increase visitor spend
- Attract investment and re-investment into the Torbay
- Ensure sustainable delivery of marketing activity for the destination
- Raise skills levels in the sector

As series of priorities and actions have been developed to help achieve these objectives.

These Objectives and associated Priorities and Actions have been developed following extensive visitor and industry surveys conducted during 2016, supported by industry trend data from Visit England and current government policy.

Achieving these objectives will be the responsibility of a newly formed Destination Management Group (DMG) which will oversee the delivery of this plan and its actions by reaching out to industry leaders within Torbay such as the Torbay Business Forum and Local Chambers of Commerce to facilitate its delivery; these industry leaders will form a sub-group of the DMG. The DMG will also be the custodians of the destination setting out how we respond to challenges facing the industry and responding to and influencing government policy.



# CONTEXT

## The Visitor Economy and Market

Tourism in England generates £85 billion a year for the economy and employs over 2.6 million people. Latest figures<sup>3</sup> for domestic overnight tourism indicate that there were over 43 million holidays, 40 million visiting friends and family and 14 million business visits. Inbound tourism saw 12 million holidays, 10.5 million visiting friends and family and 7.5 million business visits.

In 2015, over 4.5 million trips were taken to Torbay with £436 million spent by those visitors. The increases in visitor numbers and spend since 2010 when the previous Strategy was adopted are:

- 12% increase in trips by UK Domestic Visitors
- 4% increase in the number of nights spent in Torbay by UK visitors
- Spend by UK visitors has increased from £220,433,000 in 2010 to £274,410,000, which equates to an 8% increase when compound inflation is taken into account.

The table below shows the comparison of Torbay with other Devon destinations in 2015<sup>4</sup>:

	UK Trips	Overseas Trips	Day Visitors	Total Visitor Spend*
English Riviera	1,084,000	95,600	3,389,000	£436,040,000
Teignbridge	573,000	37,500	3,516,000	£253,484,000
Plymouth	637,000	76,000	4,252,000	£316,553,000
North Devon	937,000	26,000	2,964,000	£345,512,000

\* Domestic, overseas and day visitor spend

The 2016 visitor surveys show the English Riviera remains a popular holiday destination. It has a strong and loyal UK market attracting 97% of its visitors from the UK and has an extremely high repeat visitor rate of 87%.

## The Tourism Product

Situated within the stunning, rolling hills of South Devon, the English Riviera covers 24 square miles, comprising of the three towns Torquay, Paignton, and Brixham located around the east-facing natural harbour of Tor Bay.

The area includes part of the South West Coast Path, has 18 sandy beaches and is in close proximity to Dartmoor National Park. Known as South Devon's Beautiful Bay, the area's attractive coastline, mild-climate, recreational and leisure attractions have won the English Riviera the title of England's Top seaside destination<sup>5</sup>, and has been included in the country's Top 10 destinations for the past three years.

In September 2007, the English Riviera received International recognition for its rich geological, historical and cultural heritage and Torbay became a Global Geopark. The designation has full UNESCO programme status that has so far only been awarded to 120 destinations in the world.

<sup>3</sup> Tourism in England – Key Facts and Trends 2015

<sup>4</sup> South West Research Company

<sup>5</sup> TripAdvisor 2015 Travellers Choice Awards

## Policy Context

The ambition of Torbay Council's Corporate Plan is to create a prosperous and healthy Torbay. The need to ensure Torbay remains an attractive and safe place to live, visit and work is one of the targeted actions within the Corporate Plan.

Torbay's Economic Strategy provides a five year plan for growing the area's economy with a clear action plan focussing on sustainable productive growth. The Strategy places a strong focus upon ensuring that previous investment and job creation is sustained, whilst ensuring the correct environment is in place to maximise growth opportunities, raise productivity levels in businesses and deliver long term prosperity. We recognise that there are increasing opportunities in Torbay, and across the South West, to access higher learning and associated employment opportunities. We are committed to developing a robust education/employment pathway to maximise those opportunities for our young people. Within this, care leavers and children in our care will be a particular priority.

The Economic Strategy encompasses this DMP as well as the Cultural Strategy and the Transformation Strategy for Torbay's Town Centres. The Council's Local Plan provides the framework for growth, investment and planning decisions in Torbay, including policies for tourism.

The development of the destination of Torbay will also take place in the context of national and regional policy:

- The recognition by the Government of the need to support growth in the tourism industry
- VisitEngland VisitBritain's focus on building England's tourism product, raising Britain's profile worldwide and increasing the volume and value of tourism exports
- The aims of the Heart of the South West Local Enterprise Partnership to create the right underlying conditions to address productivity barriers and support specific opportunities for high growth
- The objectives of Visit Devon to promote and market the County of Devon as a tourist destination and to act as an official voice for those involved in Devon's tourism industry.

## Destination Management, Organisation and Marketing

To take this DMP forward, which is essential for Torbay's future growth, the Plan advocates a joined up collaborative approach for tourism, with stakeholders and industry working in partnership to develop the English Riviera's visitor economy.

This Plan is separate and different to the Business Plan of the English Riviera BID Company. The Company is the official Destination Marketing Organisation for Torbay, overseeing the management, delivery and evaluation of targeted marketing activities. It will operate until 2022, investing £3 million in focussed marketing activity.

The creation of a new Destination Management Group (which will manage the visitor economy and deliver the Destination Management Plan's objectives) will reach out to stakeholders and industry leaders across all sectors to effectively develop and manage the English Riviera as a whole destination.

Funding opportunities for tourism need to be maximised for tourism and business investments (infrastructure, product development and skills), the Destination Management Group will take a collective role in identify new funding sources, working together with industry to support the growth of the English Riviera's visitor economy.

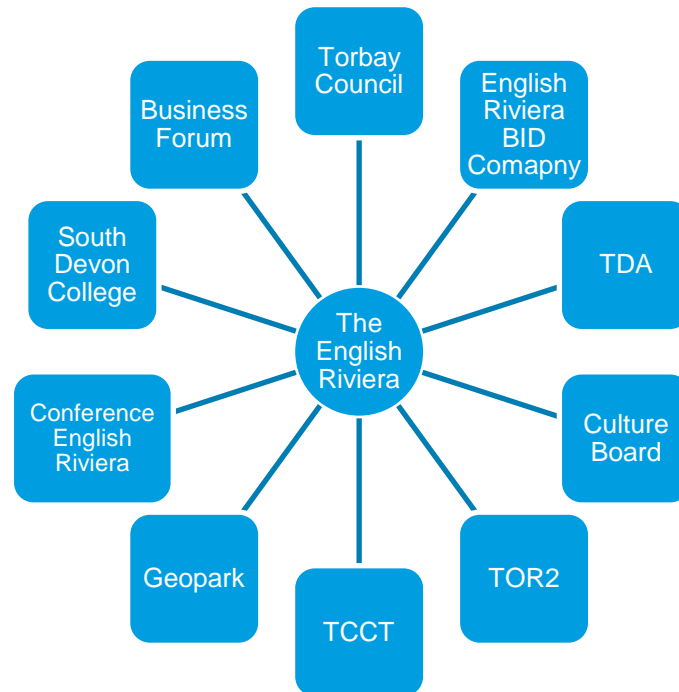


Key stakeholders of the Destination Management Group include:

Torbay Council (including  
Tor Bay Harbour Authority)  
English Riviera BID  
Company  
TDA

Torbay Culture Board  
TOR2  
Torbay Coast and  
Countryside Trust

English Riviera Global  
Geopark Organisation  
Conference English Riviera  
South Devon College  
Torbay Business Forum



Whilst, these are the leading organisations, as delivery of the Plan progresses additional members may be identified and invited to join the Group.

As part of the collaborative working partnership approach and the shared vision to develop the destination’s visitor economy, building effective strategic partnerships (local and regional) is essential for the future of tourism in Torbay. A **Sub Reference Group** will therefore also be established, supporting the Destination Management Group and who can be called upon on an ad-hoc basis to assist in the development and delivery of the Action Plan. Members of the Sub-Reference Group will include business representatives across sectors including retail, as well as organisations such as the Chamber of Commerce, Torbay Licensing Forum, Events Forum and Transport Operators (Stagecoach, First Great Western, local Boat Operators and Exeter Airport for example).

Torbay will continue to work with other partners across the South West where there are shared benefits.

### Future Challenges and Trends

TDA’s industry research (which is set out in the accompanying Evidence base) shows there are emerging trends and opportunities which are areas of opportunity for the English Riviera:

- Increase in popularity of short breaks
- Growing popularity of staycations
- Increase in business and conference tourism

- Growing national trend for wellness tourism
- Building on existing assets to increase cultural tourism
- Maximising the opportunities from TV and film production

The following pages show the strengths, issues and opportunities which are the basis on which the DMP has been developed and stem from the Evidence Base. The Plan sets the framework to bring these together to develop the English Riviera's aspirations as the preferred South West coastal tourist destination.

STRENGTHS	ISSUES	OPPORTUNITIES
<ul style="list-style-type: none"> <li>▪ Strong UK market with three quarters of visitors from outside the South West region, with large amounts of visitors coming from the M1, M6 corridors, central and north areas.</li> <li>▪ Current visitors are happy and like what they experience - high resort recommendation score.</li> <li>▪ 79% of visitors are staying overnight</li> <li>▪ Popular location for taking a leisure trip/holiday.</li> <li>▪ High proportion of affluent ABC1s visitors and in full time employment.</li> <li>▪ Exceptional high return of repeat and loyal visitors.</li> <li>▪ The majority of staying visitors are without children and in adult only groups.</li> <li>▪ Strong family market, (predominately during school holidays), seeing an increase of groups with children and increase in group size from 2.58 to 2.64 people.</li> <li>▪ Accessible location - highest proportion of visitors travelling by car.</li> <li>▪ Visitors feel well informed with information was easy or very easy to find during their visit.</li> <li>▪ Strong 'traditional seaside experience' with 62% of visitors giving this as the main reason for visiting.</li> <li>▪ High visitor satisfaction for 'resort enjoyment'</li> <li>▪ A good range of 'things to do' and attractions with good satisfaction scores.</li> <li>▪ Successful new developments, (e.g. Abbey Sands). The restaurants in this development are often full highlighting the fact that if a</li> </ul>	<ul style="list-style-type: none"> <li>▪ Torbay has an ageing visitor profile.</li> <li>▪ Low rate of first time visitors.</li> <li>▪ Extreme seasonality, predominately during the school holidays.</li> <li>▪ Low rate in overseas visitors.</li> <li>▪ The average length of stay has decreased from 5.40 nights to 4.76 nights.</li> <li>▪ The car parking offer is seen as the biggest issue</li> <li>▪ The physical environment of the high street is seen as run down – empty retail shops and dirty streets.</li> <li>▪ Increased presence of anti-social behavior and homeless people on the streets/open public areas.</li> <li>▪ The proportion of business trips is continuing to decline.</li> <li>▪ Lapsed/ non visitors do not think they can find a quality offer in Torbay (specifically food and drink).</li> <li>▪ Torbay is seen as a value for money destination.</li> <li>▪ No new destination related issues deterring visitors, but existing issues need addressing.</li> <li>▪ Half of tourism businesses experience issues as a result of Torbay's seasonality.</li> <li>▪ Low industry confidence in visitor demand, increased competition, the economy (Brexit), recruitment/retention of staff.</li> <li>▪ Short supply of high-end accommodation.</li> <li>▪ There needs to be a better link between culture and tourism and how this offer is promoted to attract new visitors.</li> <li>▪ The English Riviera is a strong brand for current visitors but the brand can be confusing, as the</li> </ul>	<ul style="list-style-type: none"> <li>▪ Promote the English Riviera as a year round destination, extending the season.</li> <li>▪ Maximise visitors' interest in the local food/drink and the outdoors.</li> <li>▪ Agatha Christie provides a useful cultural offer</li> <li>▪ Utilise local events in a co-ordinated marketing programme to attract new visitors and engage with local businesses and residents.</li> <li>▪ Increased UNESCO Geopark awareness with 40% of visitors wanting to find out more.</li> <li>▪ Review the success of the UNESCO Geopark conference and make best use of its legacy for the business/conference and international market.</li> <li>▪ Research the UK and International conference and business market to identify opportunities for the resort and the Riviera International Conference Centre.</li> <li>▪ The majority of staying visitors are without children and in adult only groups, presenting the opportunity to further develop this market to increase the shoulder season and occupancy.</li> <li>▪ Develop the quality offer and fill bed spaces out of peak summer months utilising the mix of accommodation and large stock available.</li> <li>▪ New product development to support growth in international visitors.</li> <li>▪ Day visitors staying in other areas of Devon/South West are travelling up to 1 hour to Torbay whilst on their trips.</li> <li>▪ Torbay's car parking offer can be used to attract shoppers and day visitors.</li> <li>▪ The resort can become a touring base for Devon</li> </ul>

STRENGTHS	ISSUES	OPPORTUNITIES
<p>quality product is developed, people are willing to use them and spend the money.</p> <ul style="list-style-type: none"> <li>▪ Strong industry confidence both in the future of their business and in planning to develop and grow their business in the next 5 years.</li> <li>▪ Strong desire for partnership and joined-up working from the Industry, for sharing of information/ events, promoting Torbay and improving the quality of offer.</li> <li>▪ Businesses are engaging digitally.</li> <li>▪ High delegate satisfaction score for the UNESCO Global Geopark Conference.</li> </ul>	<p>area is also known as Torbay with the towns Torquay, Paignton and Brixham.</p> <ul style="list-style-type: none"> <li>▪ Current visitors are on a budget and are using On-line Travel Agents more to find the best deals.</li> <li>▪ Working in the tourism industry is not perceived as a career option impacting on staff recruitment and retention.</li> <li>▪ Torbay is seen as too far to travel by lapsed/non visitors.</li> <li>▪ There are perceived delays in the development of new development projects. E.g. Torwood Street, Oldway Mansion, Pavilion.</li> <li>▪ 1/3 of businesses feel training isn't relevant to their business on a range of key topics and 1/3 don't provide any training at all.</li> <li>▪ April to September is the core trading period for businesses.</li> <li>▪ Low delegate satisfaction score for the quality of resort accommodation from the UNESCO Global Geopark Conference delegates.</li> </ul>	<ul style="list-style-type: none"> <li>▪ A higher percentage of non-visitors are looking for history, heritage and culture for a holiday and which they don't think they can find here.</li> <li>▪ Increase use of digital by visitors to research, book and review their trips.</li> <li>▪ New developments (e.g. Abbey Sands attracting leading restaurants) provide an opportunity to attract similar developments to Torbay.</li> <li>▪ 8% VFR market – this seems low, but may be the second reason for visiting.</li> <li>▪ Increase in shorter stays and maximise the visitor spend in this market trend.</li> <li>▪ Maximise current visitor's high recommendation scores.</li> <li>▪ Brexit is likely to lead to an increase in staycationing whilst making the UK an attractive place to visit for Europeans due to currency changes.</li> <li>▪ The South Devon Highway has improved accessibility to the area bringing Exeter/Bristol Airport closer in terms of travel times, potentially opening up new markets.</li> <li>▪ Accommodation providers can help to promote events, what's on/things to do.</li> <li>▪ Successful VisitEngland Discover England Fund project (England's Seafood Coast) will create a strong quality food and drink offer to attract new International visitors.</li> <li>▪ The new Tourism BID Company will provide a clear way forward for destination marketing.</li> <li>▪ Businesses are engaging digitally, there are opportunities to help businesses to use these platforms more effectively.</li> </ul>

# OBJECTIVES

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## Objective and Targeted Actions

The objective of the English Riviera's DMP is:

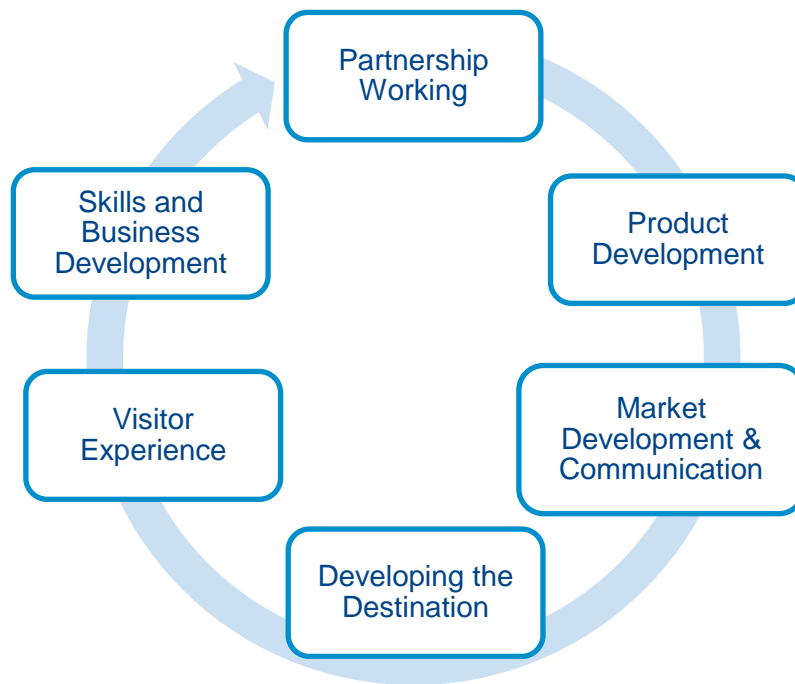
To strengthen and develop the English Riviera's tourism offer.

This will be achieved by delivering, in partnership with local stakeholders, the following targeted actions:



## Priorities

To deliver these targeted actions there are six priorities, which are all connected to ensure the success of the English Riviera's visitor economy. Whilst these priorities can stand alone, there is likely to be some overlap (i.e. developing the destination will also have an impact upon marketing and communication).



- **Priority 1: Partnership Working:** We will work collectively with joint responsibility to deliver the Destination Management Plan in order to grow of the English Riviera’s visitor economy.
- **Priority 2: Product Development:** We will strengthen the English Riviera’s all year round product, extending the season and jointly developing an increased number of compelling visitor experiences. We will build on the success of our quality natural and cultural assets, the UNESCO Geopark and Agatha Christie to attract new international and UK visitors.
- **Priority 3: Market Development and Communication:** We will identify new and emerging markets and how best to communicate with them We will make the most of our existing assets and all year round destination to attract new international and UK visitors as a key focus for marketing the English Riviera.
- **Priority 4: Developing the Destination:** We will ensure the English Riviera remains an attractive destination to live, visit and work in order to grow the visitor economy through improving the physical destination and the natural environment.
- **Priority 5: Visitor Experience:** We will ensure the English Riviera as a destination offers a quality experience across the whole resort, welcoming new visitors and encouraging their return.
- **Priority 6: Skills and Business Development:** We will work collaboratively to support tourism businesses to improve skills (including online digital) to develop the destination and to meet visitor needs and expectation.

### Outcomes

Through focused and managed actions in relation to the Priorities, this Plan will strengthen the English Riviera visitor economy and will achieve the following outcomes:

- Increased visitor numbers and spend
- Extending the season beyond the school holiday periods



- Attracting new visitors
- Attracting investment and reinvestment
- Ensuring sustainable delivery of marketing activity for the destination
- Improved quality of accommodation offer
- Improved infrastructure, parking and retail offer
- Improved hotel occupancy throughout the year
- Improved visitor satisfaction results and recommendation rates across all areas
- Increased number of businesses taking up training opportunities
- Better connection with education providers and take up of apprenticeships
- Improving the perception of tourism of a career choice, retaining skills and local talent

# ACTION PLAN

This section builds upon the presented six Priorities and sets out a series of key actions which the Destination Management Group (with a lead organisation for each action) will take forward. It should be noted that whilst these actions can stand alone, there is likely to be some overlap. The timescales and key milestones will be monitored and measured by the lead organisation, who can also call upon other organisations to support and deliver the priority.

## Priority 1: Partnership Working

Key Actions	Lead Organisation
1. Create the Destination Management Group and set the Terms of Reference, to manage the delivery of the Plan and develop the English Riviera's visitor economy.	Torbay Council
2. Create the Sub Reference Group to support the Destination Management Group and the delivery of the Plan.	Destination Management Group
3. Prioritise our looked after children and care leavers within the activities in this Plan.	Destination Management Group

## Priority 2: Product Development

Key Actions	Lead Organisation
4. Develop an all-year round seasonal product, extending the season to attract new Domestic and International visitors and overcome extreme seasonality in peak summer months. Supporting marketing and communications, promoting the English Riviera as an all year round destination, extending the season and attracting new visitors all year round.	Destination Management Group
5. Define Torbay's cultural offer to target and attract new visitors; develop new itineraries making the most of cultural assets including Agatha Christie and UNESCO Geopark, and further explore opportunities in this new market; further supporting the all year round offer and attracting international visitors.	Torbay Culture Board
6. Develop a range of packages and experiences to exploit new opportunities and satisfy the needs of new visitor markets; Develop compelling packages and targeted marketing messages to attract new	English Riviera BID Company

Domestic and International visitors, as well as re-engaging with lapsed/non visitors; including quality food and drink, history heritage and culture, natural assets and outdoor experiences/activities.

### Priority 3: Market Development and Communication

Key Actions	Lead Organisation
7. Develop an all-year round seasonal offer, extending the season, marketing the English Riviera as an all-year round destination, using Torbay's natural assets throughout the year to define and promote the offer. This should include evolving the current calendar of events/activities, making the most of big and annual events, using key seasonal messages to attract new UK and International visitors.	English Riviera BID Company
8. Ensure regular market intelligence and evaluation takes place to inform effective market development - keeping the English Riviera businesses up to date with visitor trends, emerging markets and associated opportunities and further developing the offer	English Riviera BID Company
9. Scope new opportunities and development into new UK and International visitor markets. Identifying the new trends and how to maximise the opportunities to extend the season and increase new visitors. To include increasing short breaks and maximising the rise in 'staycations', international visitors, engaging with non/lapsed visitors, under 35's, business/conference tourism and exploring TV/film opportunities.	English Riviera BID Company
10. Develop the UNESCO Geopark offer to maximise visitor interest and increase new International and Domestic visitor markets. The offer should be accessible online, reflecting visitor trends, defining how both visitors and residents can benefit; further supporting product development and the English Riviera's all year round offer.	English Riviera Global Geopark Organisation
11. Build upon Torbay's digital presence - improving the quality and accessibility of visitor information, and also increasing direct online bookings with businesses through improved e-commerce websites; Working with industry for a joined up approach to cross-promote and aligning with national VisitEngland VisitBritain campaigns which are digitally focused, including the creation and sharing of quality content, guides, itineraries and images.	English Riviera BID Company

## Priority 4: Developing the Destination

Key Actions	Lead Organisation
12. Maintain the strategic partnership focus for the development of the English Riviera's visitor economy to ensure the Plan's Objectives are achieved.	Destination Management Group
13. Aligning with Torbay Council's Corporate Plan, ensure the English Riviera remains an attractive and safe place to live, visit and work. This includes seeking to ensure service delivery, infrastructure and public open spaces accessed by visitors are maintained to support the destination's product development and meets the needs of visitors	Torbay Council
14. Review Torbay's retail and parking offer, as well as gateway and signage, to understand how it can be used to improve the quality of the visitor experience and overall welcome to the English Riviera. Ensure alignment to Torbay Masterplans' implementation timeframes and communication plans, further supporting product development and the quality of the visitor experience, specifically to overcome negative resort perceptions.	Retail – TDA Parking – Torbay Council
15. Support Torbay Council's policy for accommodation change of use; to better understand the impact on the visitor economy, the provision of support information for businesses and the future development of good quality accommodation, to attract new visitors and to meet their needs.	Torbay Council
16. Attract new high quality investments to further develop the English Riviera's offer and to attract new UK and International visitors. Specifically, making better use of Torbay Council existing capital infrastructure assets and empty buildings which are perceived negatively, including Torwood Street, Torre Abbey, Oldway Mansion and Broadsands Beach. This investment further improves the quality of offer, whilst also generating revenue for the visitor economy.	Torbay Council
17. Review Torbay's digital connectivity offer, ensuring the English Riviera offers exceptional, accessible Wi-Fi across the resort and in public spaces, improving the quality of visitor welcome and experience for both residents and visitors. This further supports product development and increasing the 'visiting friends and relatives market'. We know visitors are online during their stay to access information, book restaurants/things to do, as well as leaving online reviews. This provision therefore recognises and supports this trend, whilst improving the visitor experience.	TDA

## Priority 5: Visitor Experience

Key Actions	Lead Organisation
18. Continue to develop exceptional customer care across the resort, giving the best welcome to all visitors and maintaining high satisfaction; Providing a quality offer and visitor experience consistently all year round, attracting and maintaining visitors to a quality destination.	Destination Management Group
19. Ensure modern, well-informed parking services are provided for all visitors, as detailed in Torbay Council's Parking Strategy 2016-2021; including the adoption of clear pricing options and seasonal campaigns, increasing revenue. Further supporting the all year-round product development, providing quality, affordable and accessible parking services will meet visitor expectations and overcome negative resort experiences and improve satisfaction rates.	Torbay Council
20. Ensure industry and local residents are well informed to provide up to date information to visitors/relatives on what the resort offers. Improving the communication and promotions of resort events/services, through a joined up approach will increase attendance, visitor spend and local awareness, improving the overall visitor experience	English Riviera BID Company
21. Identify areas of opportunities to increase visitor satisfaction scores into other resort services. Overall resort recommendation is high for example from current visitors; by developing weaker areas of visitor satisfaction, such as car parking facilities, public toilets and beach services it will positively impact on the visitor experience.	Destination Management Group
22. Maximise the opportunities through awards and accreditations to raise the profile of the English Riviera as a quality destination to new visitor markets. Promote and support businesses to enter awards and gain accreditations/recognition, including TripAdvisor, VisitEngland and Purple Flag.	English Riviera BID Company

## Priority 6: Skills and Business Development

Key Actions	Lead Organisation
23. Develop the evidence base; conduct regular industry intelligence to understand the needs of industry, informing business and skills development. Ensure market-led business support is taking place, further supporting developing the destination and the visitor experience.	TDA
24. Support industry by changing perceptions for the tourism sector as an attractive career path and to retain local talent. By developing the destination and the all year round offer, it will support the industry with current issues experienced by seasonality, and the over reliance on cheap, seasonal, low skilled labour.	TDA
25. Develop an accessible and affordable programme of business support; encouraging tourism businesses throughout the destination to embrace the all year round offer and adapt to changing visitor trends. Business support should include key areas such as addressing key industry issues and those associated with 'Brexit'; recruitment and retention of staff; (linking to action 23); barriers to growth; developing digital skills; increasing revenue and maximising all opportunities to increase the visitor economy.	TDA
26. Identify future funding opportunities for business skills development, supporting the development of the visitor economy and maximising the funding opportunities. This also supports product development and developing the destination.	Destination Management Group
27. Encourage adoption of apprenticeship schemes throughout the industry, helping to overcome the barriers of recruitment and retention of staff, an issue often seen by tourism businesses due to Torbay's seasonality. Encourage the sector to take part in National Apprenticeship Week bringing together employers, schools and education providers and young people.	Destination Management Group



Contributors to Destination Management Plan



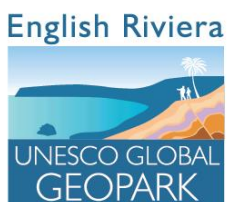
English Riviera  
BID Company



Enjoy, talk, be  
do,  
Torbay Culture Board



Torbay Coast &  
Countryside Trust



## Potential Coastal Enterprise Zone – Discussion Paper

Prepared by Alan Denby, Director of Economic Strategy & Performance, TDA

### Recommendations

That the Council lobbies for the creation of Coastal Enterprise Zones, piloting such an initiative in Torbay.

### Summary

Torbay represents a typical example of the types of coastal communities with huge potential, but which require central government support in order to achieve that potential. The right types of investment in its people, businesses and places could bring significant rewards to Torbay and help to shape a national programme of support for similar local economies.

Doing nothing doesn't mean that nothing will change; doing nothing will permit Torbay's continued decline. Doing nothing means creating more problems for tomorrow rather than exploring solutions today.

At a time of significant political uncertainty, there is an especially strong case for interventions that provide stability, promote investment and cultivate optimism on the Coast.

This report summarises proposals designed to:

- Upgrade infrastructure – specifically by strengthening Torbay's town centres, in order to create a higher quality offer attractive to local residents, which helps support the development of the visitor economy and supports the attraction of skilled labour.
- Develop skills - connecting the people who need jobs with the employers that need skilled people; helping to retain the brightest and best young people whilst giving new, existing and relocating businesses access to the technical skills they require.
- Support businesses to start and grow - by helping them to exploit market opportunities at home and abroad.

The key to success is in a package of interventions bespoke to Torbay but with potential for an application in other coastal area. To a large extent, the individual elements are not new, indeed some are tried and tested. The innovation is in bringing them together in a co-ordinated way and enacting them on a basis (and a scale) that is right for Torbay.

Not all of the suggestions in this report are likely to be agreed and this is not a plea for handouts. However finding cost-effective means of investing in the future of Torbay (and, prospectively, other coastal communities) in order to generate financial and social returns for UK Plc supports the Government ambition of driving growth across the whole country. In particular, these proposals

have the potential to benefit the Exchequer by promoting economic activity, generating tax revenues and reducing welfare spending.

At £15,599, GVA per head in Torbay is 62% of the national average. Were the proposed interventions able to close even a fifth of the gap (i.e. increase GVA per head in Torbay to £17,549), this would increase Torbay's GVA as a whole by 12.5% to £2,341 million. Were a similar improvement to be achieved across all of the above communities, the collective increase in GVA across the coast would be just under £4 billion.

The Joseph Rowntree Foundation (JRF) report "The Benefits of Tackling Worklessness and Low Pay" (December 2014) found that for every out-of-work claimant that moved into a job that paid the Living Wage (then £7.45 per hour), the Government gained, on average, almost £6,900. The local economy benefited, on average, by more than £14,000 per year every time an unemployed person began a Living Wage job. **On this basis, 1,000 Torbay residents moving from out-of-work benefits into a Living Wage job would benefit the Government by nearly £7 million each year and the local economy by £14 million each year.**

## Background

The deterioration in the economies, physical environments and social fabrics of many of the coastal communities around the UK is well documented. Indeed, there is a wealth of evidence on labour market and wider growth challenges for coastal areas, including from OECD (<http://www.oecd.org/industry/job-creation-and-local-economic-development-2016-9789264261976-en.htm>), Joseph Rowntree Foundation (<https://www.jrf.org.uk/report/overcoming-deprivation-and-disconnection-uk-cities>), the Royal Society for the Arts Inclusive Growth Commission (<https://www.thersa.org/action-and-research/rsa-projects/public-services-and-communities-folder/inclusive-growth-commission>) and most recently the Social Market Foundation (<http://www.smf.co.uk/britains-coastal-communities-amongst-worst-performing-areas-earnings-jobs-health-education/>). These challenges lead to disconnection and deprivation evidenced through not only the labour market and wider growth issues identified in the research but health, social and educational issues which cost the public purse over the long term.

Although it has much going for it, Torbay is an example of one of the disconnected areas described in the above research and a place where deprivation remains far too prevalent. This scoping report sets out a number of potential policy interventions that could help to turn the tide in Torbay and other similar coastal communities.

Furthermore, the need for new policy prescriptions is given added urgency by the changing funding landscape. In October 2015, the Government announced plans whereby local authorities would keep 100 per cent of the Business Rates raised locally, putting the onus on councils to maximise this source of income. In addition, coastal communities such as Torbay have benefited substantially from European Structural Funds (European Regional Development Fund and European Social Fund). At present, there is uncertainty as to whether or not the current UK Programme (2014-2020) will run

its full course or, if not, how and to what extent it might be replaced. It is understood that DCLG/BEIS is currently consulting on a prospective replacement: the UK Shared Prosperity Fund. Torbay advocates that this Fund be designed in such a way as to resource the types of projects described in this proposal for the benefit of places like Torbay.

In particular, Torbay has an opportunity to re-define its sense of place through investment in its town centres. Failure to do so means further decline is inevitable. However, breathing new life into Torbay's town centres will generate the confidence that will attract the investment, the people and the businesses.

In addition, Torbay has an opportunity to complete the rebuilding of its electronics sector, moving from a reliance on relatively few firms and large numbers of semi-skilled jobs, to more firms and more highly skilled jobs. This is supported by plans for an Innovation Centre and a new hi tech and digital campus proposed by South Devon College, as well as potential for a Torbay contribution to a dispersed Institute of Technology (covering electronics, big data, marine and nuclear) across the Heart of the South West LEP area.

The emerging UK Industrial Strategy aims to grow the productivity of the economy, raise living standards and ensure benefits are shared across the country. The Green Paper (published January 2017) focuses on 10 core themes or 'pillars':

1. Research and innovation
2. Developing skills
3. Upgrading infrastructure
4. Supporting businesses to start and grow
5. Improving procurement
6. Encouraging trade and inward investment
7. Delivering affordable energy and clean growth
8. Cultivating world-leading sectors
9. Driving growth across the whole country
10. Creating the right institutions to bring together sectors and places

Whilst Torbay can contribute to each of the above to varying degrees, there are certain pillars in which appear to be especially relevant, namely:

- Developing skills;
- Upgrading infrastructure; and
- Supporting businesses to start and grow

It is these pillars on which this submission focuses. Furthermore, the emphasis is on ways in which to add value to existing initiatives by ensuring things happen faster than they otherwise would, can be done better than they otherwise would or are enabled to happen when that might not otherwise have been the case.

Torbay is keen to play its role in contributing to the Government's Industrial Strategy but will need to have access to the right instruments in order to be able to do so.

The Localis report (March 2017) 'The Making of an Industrial Strategy'

[http://www.localis.org.uk/wp-](http://www.localis.org.uk/wp-content/uploads/2017/03/004_Localis_IndustrialStrategy_AWK_WEB-1.pdf)

[content/uploads/2017/03/004\\_Localis\\_IndustrialStrategy\\_AWK\\_WEB-1.pdf](http://www.localis.org.uk/wp-content/uploads/2017/03/004_Localis_IndustrialStrategy_AWK_WEB-1.pdf) went further in stating that, for all its merits, a national industrial strategy: *"won't suit, or even help a great many places whose choice will be to either lead their own industrial strategy or have none at all."* Such places are described as 'stifled' or 'stuck'.

## Upgrading Infrastructure

In coastal communities, the need and opportunities for infrastructure investment come in a variety of forms. These include:

- Town and city centre regeneration
- Transport connections (mainly road and rail);
- Broadband connectivity; and
- Coastal defences.

Naturally, in Torbay each of the above is important. However, the focus of this initiative would be on town centre regeneration and the creation of space for business growth.

Many coastal town and city centres have endured long term decline as private sector investment has reduced. In some places investor confidence has evaporated altogether, due to an adverse shift in the balance between risk (perceived as becoming relatively higher) and reward (experienced to be getting relatively lower).

Trying to turn this into a plus, it can mean that land and property prices are relatively low and that there are opportunities to attract the types of individuals/businesses that place a high value on quality of life and are looking for locations with relatively low overheads. For example, there are coastal towns that have made a virtue of undergoing regeneration in order to attract cultural and creative businesses in particular.

Intervention can involve the provision of direct assistance to private sector developers (e.g. provision of gap funding), by proving and catalysing the market (such as by investing funds in the first phase of a development) or through direct investment. Where there are uncertainties surrounding the economic case for development for the private sector, it may be that the key to catalysing the market is through better or more widely available/understood market intelligence.

In November 2016, the Government published the most recent set of data on the Enterprise Zones programme since its inception, in April 2012, to March 2016. This indicated that the 24 EZs had attracted £2.7 billion of private sector investment over this period, helping to create nearly 30,000 jobs. Clearly, the nature and scale of these EZs varies considerably, however, it appears that each has had an important role to play within its local context. Indeed, more Enterprise Zones were announced in the Autumn Statement in 2015 and in the March 2016 Budget. Up to 48 Enterprise Zones are currently planned to be in place by the beginning of April 2017.

EZs offer:

- up to 100% business rate discount, worth up to £275,000 per business over a 5-year period;
- Simplified local authority planning procedures;
- Government support to ensure superfast broadband connectivity; and
- (in Assisted Areas) 100% enhanced capital allowances to businesses making large investments in plant and machinery.

In addition, EZs can unlock other government funding. On either a loan or equity basis, the **Local Infrastructure Fund** invests in early enabling works in and around Enterprise Zone sites. The **Enterprise Zones Capital Grant Fund** can be used to make sites commercially viable for development by addressing issues such as abnormal costs, public infrastructure costs and land assembly.

An EZ in Torbay (part of which is a Category C assisted area) is unlikely to have the same level of impact on the UK economy as one in Bristol, Manchester or Sheffield, but it might well have a bigger impact on the Torbay economy than existing EZs have on the cities in which they are located. Furthermore, if rolled out to other coastal economies, the aggregate effect might well be significant.

If the Government is happy to endorse University EZs and Food EZs (dedicated to food and agriculture), why not Coastal EZs? Furthermore, if the 24 existing EZs managed to attract £2.7 billion of private sector investment and generate 30,000 jobs, is it not plausible that Coastal EZs might between them attract at least £1 billion of additional investment and generate at least 10,000 jobs?

Furthermore, with all business rates growth generated by an Enterprise Zone being kept by the Local Enterprise Partnership and local authority for 25 years to reinvest in local economic growth, a Coastal EZ offers the prospect of sustainability.

## The Proposal

In order to encourage higher levels of private sector investment into Torbay and thereby facilitate town centre regeneration and the creation of attendant business opportunities, the following are proposed:

- the creation of a Coastal Enterprise Zone in Torbay, offering
  - up to 100% business rate discount, possibly worth more than the EZ standard of £275,000 per business over a 5-year period (recognising the deep-seated issues in coastal areas) and potentially targeted at particular types of businesses/specific business sectors;
  - a commitment to the use of simplified local authority planning procedures (which Torbay Council can offer quite straightforwardly and has used Local Development Orders to support change);
  - Government support to ensure superfast broadband connectivity (characteristic of existing EZs, but not considered a big issue given Torbay's digital connectivity); and
  - 100% enhanced capital allowances to businesses making investments in plant and machinery (although existing EZs restrict this to large investments, the suggestion here is that it be applied to all investments in order to benefit smaller businesses).



- A Fund to support early enabling works in and around Enterprise Zone sites and resource the completion of infrastructure projects that facilitate commercially viable development where there has been “market failure”.

In addition to the above ‘standard’ characteristics of EZs (albeit with some suggested modifications), the following might also be included:

- Priority access to the Local Full Fibre Network Fund, providing vouchers for businesses to access full fibre.
- Allowing Coastal local authorities to borrow from the Public Works Loan Board at a discounted interest rate specifically where the investment is for the infrastructure that supports the creation of new jobs and business growth. A reduction of 0.5% would save the Council an estimated £125,000 on borrowing of £25m helping the viability of projects.

## Supporting businesses to start and grow

Torbay’s economic future will largely be determined by its ability to cultivate more business start-ups and to grow existing businesses. Targeted interventions should help to boost rates of new firm formation, reduce the number of business failures and accelerate business growth, through a combination of:

- Property development that provides appropriate and affordable accommodation for business starts and move-on accommodation for expanding firms
- Access to finance measures that give businesses the resources they need to underpin growth
- Exporting support for businesses exploring international markets
- Innovation support to encourage the introduction of new products and processes

### Property Development

Torbay has, historically, experienced a lack of investment in business premises with an associated short supply of good quality business accommodation.

Following the opening of the South Devon Highway in late 2015 and other more recent developments, there is growing interest from indigenous businesses and inward investors in Torbay. However, the limited availability of facilities of the right quality is preventing growth. Meanwhile the quality of the existing commercial and industrial stock is slowly deteriorating. Incubation facilities can provide flexible space on favourable terms and often offer access to a range of support services, including general administrative provision and more tailored business support. Indeed, experience elsewhere suggests that a key factor in successful delivery is the provision of a comprehensive business support package, incorporating specialist knowledge if possible and delivered over an extended period of time. Crucially, such developments can also bring together like-minded businesses who can learn from each other and, in some cases, collaborate such as at EPIC.

However, bringing forward such developments in Torbay (and many other coastal economies) has been very difficult. Private sector investors and developers have not had the confidence to

undertake these sorts of developments in the market conditions that have persisted over many years, whilst the public sector's ability to do so has been constrained by lack of funding and difficulties in accessing third party resources.

Torbay is currently developing projects and proposals for town centre and commercial schemes with a development value estimated at more than £150 million over the medium term. In the absence of a grant funding programme there is scope to secure funds via the Public Works Loan Board. Torbay is calling for the Government to permit coastal areas to borrow from the PWLB at preferential rates of borrowing and/or to design some form of forward funding model. In respect of grant funding, perhaps using precedents established under ERDF, there is also potential for resources to be made available through an enlarged Coastal Communities Fund or Shared Prosperity Fund, subject to government endorsement

### **Access to Finance**

In respect of *debt finance*, the rationale for intervention is that many viable (especially early stage) businesses are unable to obtain normal commercial loans, because they lack adequate security or a proven financial track record. There are also specific issues faced by young people, given their lack of assets, low credit ratings and perceptions of risk amongst lenders.

Access to *equity funding* can be particularly susceptible to market failures, including: lack of information amongst investors on the range and quality of opportunities, due to the lack of visibility of many small firms; disproportionate due diligence costs; incentives for fund managers being skewed towards larger deals; and perceptions of risk. Equity funding gaps tend to be most common in the £2 million - £10 million range in that business angels (including syndicates) often invest up to £2 million, and venture capitalists more likely to be investing around £10 million and above. One option is to develop an Accelerator Programme whereby investments are made into new start and early stage businesses with potential for more rapid growth. While some will fail the nature of an Accelerator programme <http://www.nesta.org.uk/publications/startup-factories> encourages knowledge based businesses and this could support efforts to attract more inward investment and/or younger business owners.

### **Exporting**

Encouraging businesses to export brings a number of benefits, not least opening up growth opportunities and spreading risk. In addition, exporters are more innovative by the very nature of having to address other national market requirements. As a result, productivity is found to be significantly higher than amongst non-exporting firms.

Departmental for International Trade (DIT) services – including those delivered by Business West in respect of DIT's Export 4 Growth Programme - are focussed on 'ready to export' SMEs which have the capacity, but lack the confidence and/or skills to export. There appears to be very little support focussed on SMEs not ready to engage with DIT/its partners who have little awareness or aspirations to export and do not currently appreciate that they have products/services which have excellent exporting potential.

Furthermore, there may be particular merit in taking a sector-focused approach. This could facilitate sector participation in overseas exhibitions and supporting inward 'meet the buyers' missions.

It should be noted that it takes time for companies to be able to incorporate this support within the cycle of the export strategies in order to achieve effective long-term impacts. Consequently, and due to the long-term lead in times of exporting, any service needs to run for at least three years and longer if it is to have any substantial traction in engaging meaningfully with businesses.

## The Proposal

To some extent, business development issues would be addressed by the proposals outlined in other sections of this paper. In addition, we propose the following:

- provision of a gap funding grant to encourage commercial development where it would not otherwise be commercially viable.
- developing and delivering business support to encourage the growth of existing enterprises.
- setting up a sector focused accelerator programme to stimulate creation and growth of knowledge based businesses in the area using existing sector strengths and reinforcing other investments
- provision of export support services to businesses that are at an earlier stage of exporting development than those targeted by DIT services, including:
  - Information, advice, guidance, and signposting/cross-referring, through a variety of promotional activities and by relevant agencies working more collaboratively.
  - Running export support workshops (at least twice a year), drawing on the external expertise of Business West and the local knowledge and practical support of Torbay Development Agency.
  - Supporting attendance at overseas trade shows and on overseas trade missions through the provision of grants, on a 50% match funded basis.
- focussing on the electronics/photonics sector specifically, explore how innovation and knowledge transfer might best be facilitated.

## Developing Skills

A key issue for coastal communities is the actual/perceived lack of employment and business opportunities. This leads to:

- low levels of aspirations amongst many school leavers;
- the loss of more able young people, depriving coastal economies of higher level skills and entrepreneurial ambition; and
- difficulties in attracting skilled and enterprising people.

There is therefore a need to invest in initiatives that give hope to all young people, retain the brightest and best, and attract new talent to these areas.

Furthermore, the skills issues that hold back individuals also impact on businesses. An actual or perceived lack of skills can limit productivity, discourage expansion, threaten sustainability and discourage new investments into an area.

**MADE (Manufacturing Activities Designed to Engage)** initially ran as a two-year pilot programme (ending in June 2017) led by TDA in conjunction with the businesses in the hi tech and manufacturing sectors. It sought to raise the profile of STEM careers locally amongst young people in secondary and further education, through a partnership of 14 schools/colleges and 35 businesses. The pilot recruited 150 STEM Ambassadors and engaged nearly 1,900 young people. Activities included:

- Marketing and Profile Raising Activity
- Purchase of a Manufacturing Tool as a Central Held Shared Resource
- Development and Delivery of STEM focussed 'Reciprocal Lessons', including the MADE Manufacturing School Challenge Competition
- TechBay Engineering: Your Future - STEM Events for Schools
- Work Experience Offer for Local Manufacturing and STEM Focussed Businesses

In May 2017 additional funding was secured to extend the programme through to August 2018. This involves continued/repeat delivery of:

- the MADE Manufacturing Challenge
- Accredited Work Experience for Students
- TechBay Engineering: Your Future

New elements of the Programme include:

- A Challenge Activity
- Purchase of a 'class-set' of hardware, software and resource kits
- Work Experience for Teachers
- Girls into Engineering
- Gooch & Housego STEM Day'18

There is merit in sustaining and broadening these activities but also extending this approach to other sectors.

## **The Opportunity**

The intention would be for time-limited interventions (or perhaps ones withdrawn gradually over a period of time) that would be designed to change attitudes to investing in skills development by demonstrating the benefits of doing so.

### **Employers**

In order to avoid compromising the integrity of the Apprenticeship Levy, the intervention would be aimed at employers well below the AL threshold (which applies to employers with a wage bill in excess of £3 million). Suggestions include:

- Providing information on the benefits of investing in training and specific opportunities available locally to types of employers exhibiting low levels of take-up;
- Sector-specific skills support focused on the hospitality, construction, electronics and social care sectors.

- Bringing employers together on a group (cross-sector) basis in order to provide critical mass that justifies provision of more generic/transferrable being made available and/or enables employers to shape provision/negotiate down costs;
- Providing additional grants to help SMEs meet the costs of apprenticeship and other training; and
- Continuation and extension of MADE activities
- An action to encourage secondary school leaders to work more closely with the local business community to prepare young people for employment

## Next Steps

- Confirm support from local partners/MPs –October
- Lobby LEP for inclusion in Productivity Plan – September/October
- Use local/regional media for Mayor/Cllrs/MPs to promote the concept
- Gain support from coastal partners including the National Coastal Tourism Leaders Forum and Coastal Communities Alliance - October
- Promote to Departments/Government - Autumn

## Other coastal areas

The table below lists a selection of 15 local authorities in England and Wales with significant coastal communities and with populations of between 100,000-150,000. Also shown is total GVA and GVA per head. In isolation, such places might be considered too small to have a significant impact on the national economy, but not only is there the prospect of significant local impacts but, in aggregate, at the national level too.

Place	Population	GVA (£m)	GVA Per Head (£)
South Tyneside	148671	2132	13954
Tendring	141183	2161	15308
Blackpool	139578	2146	15372
Thanet	139772	2099	15021
East Lindsey	137887	2233	16192
Redcar & Cleveland	135275	2055	17200
Torbay	133373	2081	15599
Teignbridge	128826	2309	17925
Vale of Glamorgan	127592	2028	15894
Conwy County Borough	116218	1809	15568
Waveney	116182	2215	19068
Dover	113228	1779	15715
Scarborough	107902	2098	19443
Worthing	107736	2566	23818
Eastbourne	102465	1869	18242
<b>Total</b>	<b>1,895,888</b>	<b>31,580</b>	

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Were a similar improvement to be achieved across all of the above communities, the collective increase in GVA would be just under £4 billion.