

CULTURAL TOURISM

MOTIVATING TOURISTS WITH RE-IMAGINED
EXPERIENCES, ITINERARIES AND GUIDES

FINDINGS: DECEMBER 2018



AUDIT & REVIEW

- Process journey of working “with” everyone
- Starting with an audit/review
 - 30+ consultative interviews
 - 50+ survey responses
 - Stacks of desk research
- Now ready to present findings back for discussion
- With core pillars: top, most meaningful products
- Next stage will be to formulate itineraries, trails, guides
- With more testing and feedback
- Looking to deliver this during 2019

WHAT DO WE NEED TO DO?

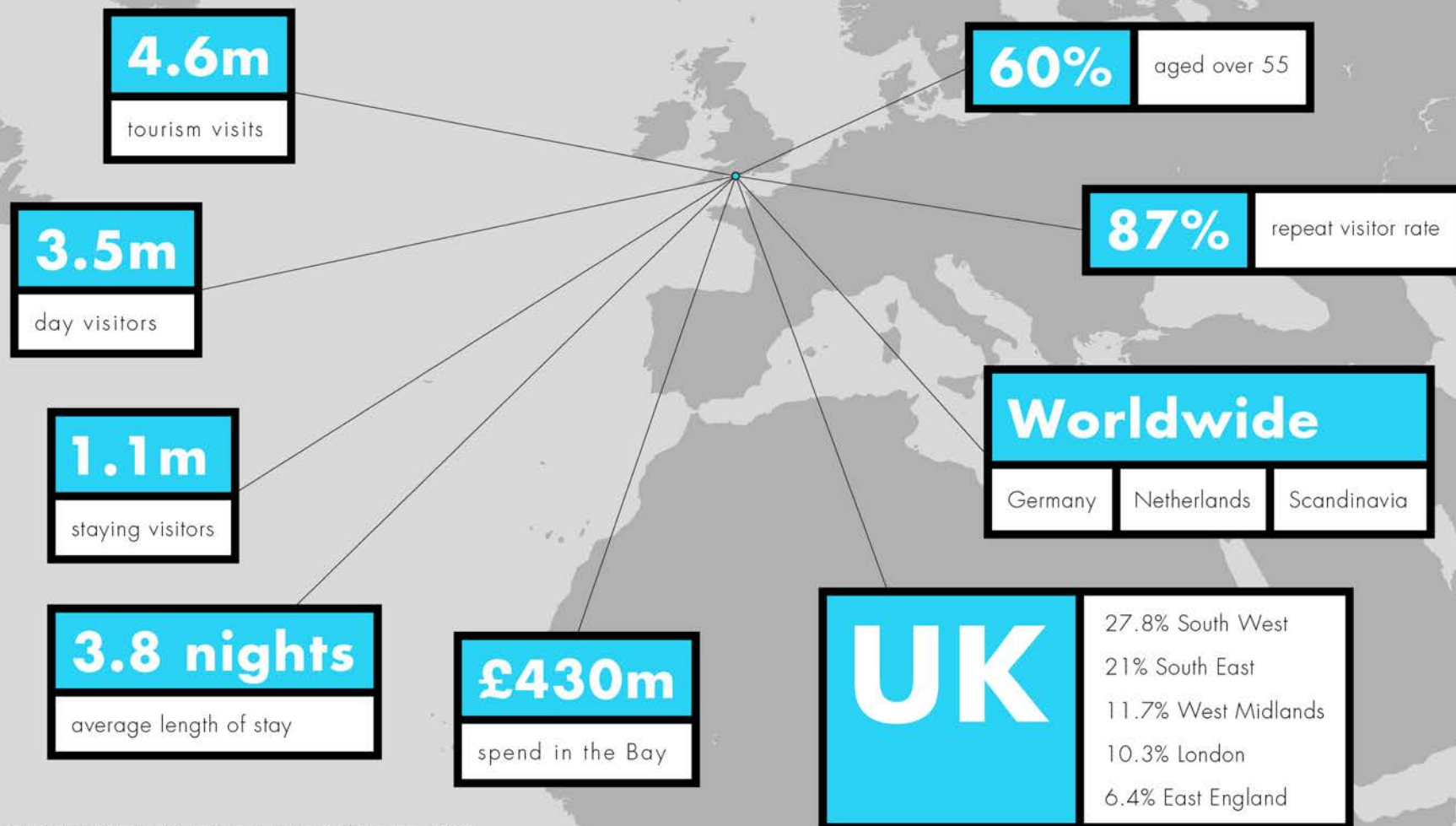
- Ultimately increase visitors, occupancy and extend the season
- Differentiating from other destinations
- Realistic and sustainable
- It's not about the next big thing (transient)
- Build on the strengths of what's here already (permanent)
- Benefit new and existing visitors... and residents
- Well crafted narratives, delivered effectively
- New framework for itineraries, trails and guides

CAUTIONARY NOTE

- Trails and guides have been done before
- BUT they're not sticking, well used, consistent or widespread
- Opportunity to join themes, interests and experiences
- And to update the content and channels used
- We **MUST** now take shared responsibility for cultural tourists

RESEARCH, STATS & TRENDS

TOURISM LANDSCAPE



TOURISM LANDSCAPE

1 UNESCO Global Geopark & South West Coast Path & Birthplace of Agatha Christie

11,625
employed in tourism in the Bay

22 miles
of beaches and coves

81% booking accommodation and activities online

20+
cultural venues and heritage sites

1/2 Over half of visitors sharing experiences and reviews online

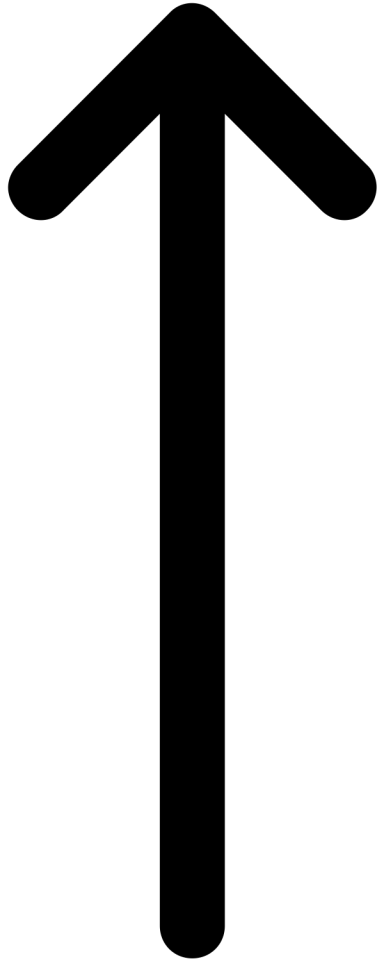
THE CULTURAL TOURIST

What do cultural tourists want?

In a word: authenticity!

- To live like a local
- Juxtaposing large and small; old and new together
- Genuine, trusted and hassle-free discovery
- All served up in a personalised way
- Memorable, brag-able experiences

TYPES OF CULTURAL TOURIST



1. Purposeful

Highly motivated: culture is their main reason for choosing this destination. They want a deep cultural experience. Explore further, stay longer and spend more!

2. Sightseeing

Culture is one of the main reasons to visit, but their experience isn't as deeply rooted. Think business, student and knowledge tourists.

3. Serendipitous

Don't travel specifically for culture, but are interested in seeking out experiences before and during their stay.

4. Casual

Culture is not a motivation for their visit and as a result, they don't have a deep cultural experience.

5. Incidental

This type of tourist does not travel for culture, but does engage in some very light touch cultural experiences.

Source: Based on McKercher B. and H. du Cros, Cultural Tourism: The Partnership between Tourism and Cultural Heritage Management.

THINGS TO BE FAMOUS FOR...

A word cloud featuring various attractions and landmarks in Devon. The words are arranged in a roughly rectangular shape, with some words appearing in a larger, bolder font than others. The colors used are black, blue, and grey. The words include:

- beautiful beaches
- seascape
- natural beauty
- English Riviera
- happiness
- outdoor living
- year round
- Torquay
- English charm
- harbour
- family holiday
- Oldway Mansion
- airshow
- outstanding attractions
- steam trains
- attractions
- stunning scenery
- Stone Age Britain
- landscape
- Paignton
- seafood
- bars
- villages
- Agatha Christie
- coastal walks
- historic buildings
- local produce
- cream teas
- Brixham
- cultural heritage
- cultural events
- Geopark
- countryside
- climate
- food
- regatta
- writers
- water activities

WORDS YOU'D LIKE TO USE...

better than Brighton
unspoilt
memorable
smart
different
attractive
class
stunning
accessible
historical
culture
bright
seafood
friendly
invigorating
beautiful
interesting
fun
safe
uncommercialise
warm
world class
inclusive
vibrant
diverse
enjoyment
relaxing
hidden gem
breath taking
traditional
unique
rejuvenating
always something new

SNAPSHOT OF NON-VISITORS



In England:
44% of holiday nights spent by the seaside
22.3% countryside/village, 18% city/large town



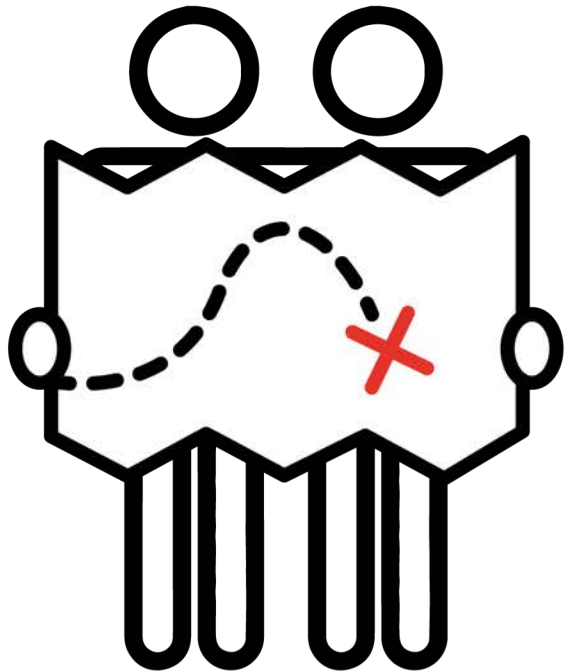
Typically younger than current/lapsed visitors
51% aged 45-64 years



Gender prominence:
67% female

Sources:
English Riviera 2016 Destination Management Plan Research
Forbes.com 2014
Kantar TNS 2017

SNAPSHOT OF NON-VISITORS



WHAT DO THEY WANT?

79% quality food and drink

74% rest and relaxation

64% nature and countryside

64% history, heritage and culture

SNAPSHOT OF NON-VISITORS

Crucially, this data shows that non-visitors don't think they can find what they are looking for in a holiday in the English Riviera. It appears 'history, heritage and culture' is more important for non-visitors, which was given as a top attribute for when choosing a destination. This therefore presents a clear opportunity for product development to attract new visitors to the destination.

- DMP 2017-2020

TAKE NOTE: VISITBRITAIN



TRENDS: FULLY IMMERSIVE



- Cookie cutter holidays are declining. Fully immersive experiences are increasing
- 70% are saying "I like to immerse myself in the culture and feel like a local"
- 2 out of 3 people say itineraries would make them more likely to visit
- Trends in tourism: active, food & drink, wellbeing, sustainable
- Must be entertaining / fun AND learning / self-improvement

TREND: EXPERIENCE-LED



- It is becoming less relevant to think about travellers in terms of their age and more in terms of their interests.
- Collect as many unique experiences as possible, without having to invest considerable time/money in getting about
- Women still make 80% of decisions on travelling; ignore women at your peril
- Travelling solo is one of the fastest growing categories... in Europe
25-30% of adults live alone

TREND: DIGITAL MATTERS



- BUT circle of influencers getting smaller
- Popular bloggers and influencers are a powerful source of inspiration
- Content marketing is the most powerful tourism strategy
- In 2019, video will represent 80% of all internet traffic
- How does it contribute to my social standing? Braggable and shareable

TREND: FOCUS DOWN

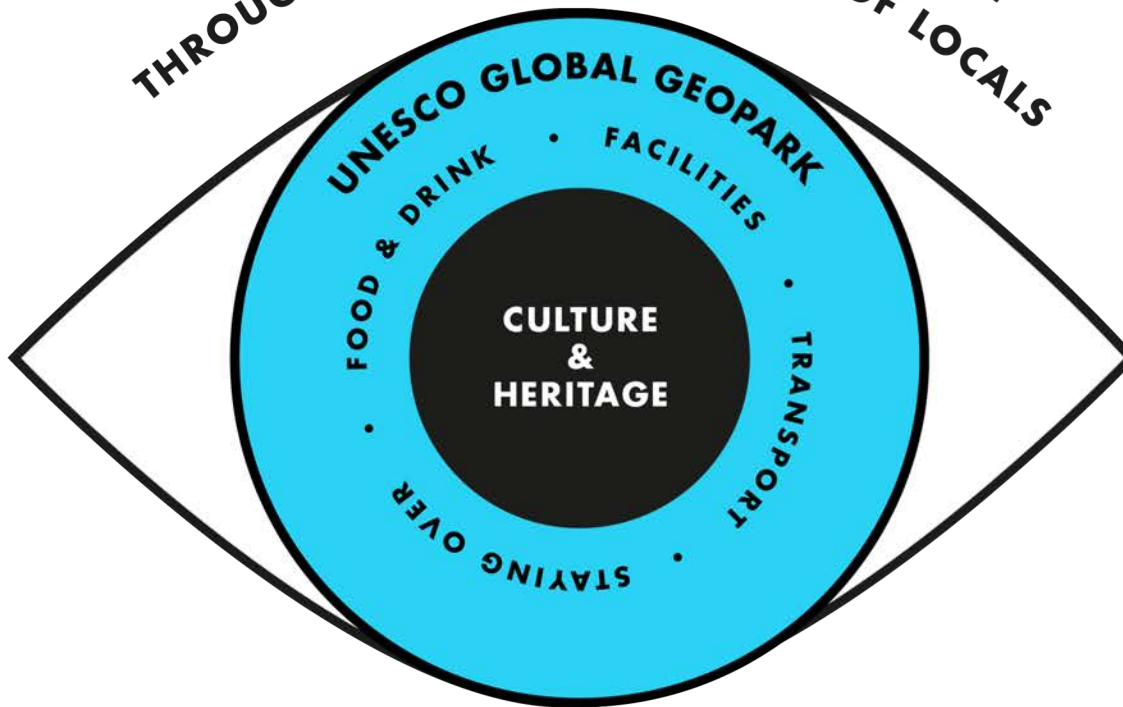








- BREXIT... who really knows. Opportunity with staycations; pull the regions to the Bay
- Scandinavian (Denmark record high), Japanese, Chinese and United Arab Emirates inbound tourists are growing.
- Seeking diversity of curated offers, with 70% making decisions online
- Storytelling via Key Opinion Leaders and Group Travel Organisers is critical to success

**A NEW VISION:
GO SEE & DO LIKE THE LOCALS**

LIVE LIKE A LOCAL

THROUGH THE EYES AND VOICES OF LOCALS



CURATED ITINERARIES, TRAILS & GUIDES	
SEASONAL	DURATIONAL
	
	
	
	

UNESCO GLOBAL GEOPARK

- A brand that is growing; alongside sustainable tourism
- The Geopark is everywhere; it is the canvas
- It has to be laced across everything serendipitously
- Everything should refer back to this global status
- There is an opportunity here for artistic interpretation

THROUGH THE EYES OF LOCALS

- This is not an “official” or “corporate” voice
- Everything will be an insider’s guide
- First person never third person
- Through the eyes and voices of the locals
- Those who have places, spaces and knowledge to share
- Aspirational and diverse set of people
- Immediately resonating the “friendly” feel
- Building our – the locals – pride in tourism
- Potential to also use the voice of the global influencer

WORLD LEADING TOUR GUIDES

- This place needs visible hosts and guides
- Both commercial and volunteers
- Opportunity to develop a training academy
- Practicalities: recruitment, indemnity, sustainability
- Aim high... Wanderlust World Guide Awards
- Museum Hack: tours for people who don't like museums
- Aperture Tours: visit with professional photographers
- Ystad, Sweden: In The Footsteps of Wallander Tour

INTRODUCING 4 PILLARS

The English Riviera is an ever-morphing, epic canvas of international significance. This is a place where the natural and cultural heritage leaves you utterly inspired.

This backdrop informs and infuses everything that happens here.
Escape to a place where you can **speed up** for adventure.
Join the **slow down**, re-fresh and feel better.
Be in good company with a **well read** creative community.
Embrace the **artisans and makers** on a journey of discovery.
Live like the locals.

PILLAR 1: SPEED UP



PILLAR 1: SPEED UP

Adventure and activity based holidays are on the up. Let's join our local adventurers together.

Feel more alive on an action-packed – literal - film set. The backdrop for adrenalin - whether you #ridethebay - or walk, run, swim, coasteer, jet ski.

Opportunity to “own” more of a position on the home of the South West Coast Path and to weave in the Geopark story as a natural playground.

Fuel your sense of adventure in an extraordinary place.

- Coasteering
- Sailing
- Sea Kayaking
- Paddle boarding
- Cycling & off road
- Running clubs
- Wild swimming
- Fish market tours
- Fishing trips
- Cider/gin making tours
- BBQs on the beach
- Coffee, burgers/fish & chips
- Live music at intimate venues

PILLAR 1: SPEED UP



Al3xei
Exeter, United Kingdom

📄 10 🍎 3



Reviewed 1 August 2016

Fantastic afternoon's coasteering in a beautiful corner of Devon

Scrambling, climbing, caves, swimming, terrifying jumps - all with Charlie's guidance and encouragement, plus her amazing photos to remember it all by. Such a great afternoon, really recommended!



cullen2k
Hereford, United Kingdom

📄 1 🍎 1



Reviewed 20 October 2018 📱 via mobile

Wow if I could give a 6 I would

Well we're to start amazing Glenn is very approachable funny and was great at making myself and my wife feel safe out on the water the best part for us was seeing the dolphins up very very close but even without that it still would of been the best few hours if u haven't tried jet skiing I would recommend jet set go well worth the money

PILLAR 1: SPEED UP

☒ Authentic

☒ Different

☒ Desirable

☒ Seasonal

☐ ? Risky

☒ Commercial

☒ Bookable

☒ Measurable

PILLAR 2: SLOW DOWN



PILLAR 2: SLOW DOWN

Mental and physical wellbeing: tapping into slow tourism movement. Retreat to the Bay; a place to slow down, relax, indulge and refresh.

Get rejuvenated with secret experiences set against the wonders of nature. Take a deep breath of sea air as you walk, ride, taste and sightsee through the Bay.

Opportunity to again particularly push the home of the South West Coast Path and Geopark story.

Feel better and enjoy a slower pace of life... like the locals.

- Yoga paddle boarding
- Walking at a gentler pace
- Wildlife spotting/talks
- Museums, galleries, studios
- Heritage and architecture
- Photography/insta tours
- Open top bus tour
- Steam train
- Creative wellbeing
- Outdoor swimming pools
- Spa days
- Acoustic live music & comedy
- Cream teams to Michelin starred

PILLAR 2: SLOW DOWN



marty w
Broadstairs,
United
Kingdom

📍 427 🍷 183



Reviewed 18 August 2016

You could be anywhere in the world

The cove is sign posted on the main coastal road near the Palace Hotel. just follow the road , narrow at times, but you end up on a one way road. A large car park, pay and display. Walk to your left, you have steps or a small road to walk down, very steep in places, but worth the walk as the view of the sea and cliffs takes your breath away. A small prom and rocky beach at the bottom, café, toilets, kayak and sun bed hire. Just sit a while and take in the view, as sailing boats anchor up in the still waters . This is heaven on earth.



Elizabeth P

📍 13 🍷 2



Reviewed 25 June 2018 📱 via mobile

Never stopped

Well it as to be said that the Torby area is absolutely stunning. We stayed in Torquay and from there went to lots of surrounding area. You can take a boat ride to Brixham or Dartmouth. Walk along the coastline and see some amazing coves . All area have a good bus route are in easy walking distance or accessible by car. Kent's cavern is also worth a visit. My advice is go and explore.

PILLAR 2: SLOW DOWN

☒ Authentic

☒ Different

☒ Desirable

☒ Seasonal

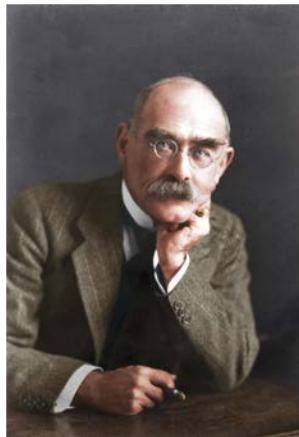
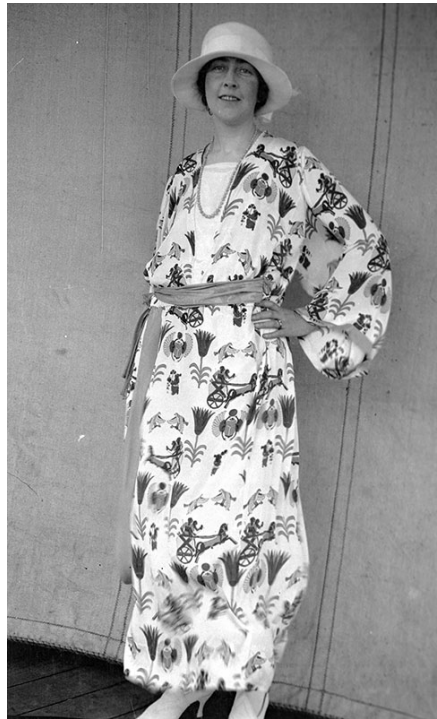
☐ Risky

☒ Commercial

☐ Bookable

☒ Measurable

PILLAR 3: WELL READ



PILLAR 3: WELL READ

This is the birthplace of Agatha Christie and home to many of her stories. For example: making it no. 2 in the Telegraph's British Cultural & Heritage Holidays guide.

Home also to: Rudyard Kipling, Edward Bulwer Lytton, Elizabeth Barret, Adam Nevill, Lesley Pearce, BLYN and Robert Garnham.

Visitors of the past have also included: Oscar Wilde, James Joyce, Mary Shelley, T.S. Eliot

Literature – the written, spoken and sung word – is a genuine theme for the English Riviera to own and celebrate

Source:

<https://www.telegraph.co.uk/travel/destinations/europe/united-kingdom/articles/british-culture-andheritageholidaysguide/>

PILLAR 3: WELL READ

‘Well Read’ is a genuine opportunity to seize; it is the area where we have a significant backstory to build upon.

It is also where the product needs most work from the Agatha Christie Mile and heritage walks to IACF, a literature festival and creative writing workshops/retreats.

- Literature heritage walks
- Through their eyes/words
- Vintage sailing regatta
- Steam train
- Creative writing retreats
- IACF and literature events
- Audio tours by today’s talent
- Music playlists to listen here
- Stand-up and spoken word events
- Greenway and Torquay Museum
- Eat and drink like a writer

PILLAR 3: WELL READ



Ashley T
Cumbria,
United
Kingdom

📄 144 🍌 100



Reviewed 4 weeks ago

Excellent example of how to bring history to life

Greenway is the holiday home of Agatha Christie and from the welcome by National Trust staff in the car park, reception and staff, it was clear that much thought had gone into how to display this icon of 30's to 70's cultural history.

There is no attempt to overplay the house and it is as Ms Christie and her husband would have found it in the post war years. What they have done is brought both the house, with its rich history with insights into the life of Christie - as well as being a writer she was a classical pianist, opera singer of some acclaim and, with her second husband, a renowned archeologist specialising in what is now Iraq.

There appears to be things going on throughout the year and the magnificent gardens which include a walk to the boathouse on the Dart River, is well worth a visit.



Roland D
London,
United
Kingdom

📄 1064 🍌 570



Reviewed 28 June 2018

I suppose worth doing if you have nothing better to do

I was staying at The Imperial Hotel, which is one of the stops on The Mile. There is one of the plaques, which notes the connection, but there is little to explain the significance of most of the places you are seeing. It includes a bust of Dame Agatha, by the Marina, but so what? It is not really that great a work of art and I could see no significance in where it was situated. The "Mile" seems a half-hearted attempt to milk the connection Dame Agatha had with Torquay.

PILLAR 3: WELL READ

☒ Authentic

☒ Different

☒ Desirable

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PILLAR 4: ARTISANS & MAKERS



PILLAR 4: ARTISANS & MAKERS

There is remarkable yet hidden creative talent here. With opportunity for visitor immersion

Step inside the life of an artisan and maker e.g. open studios, workshops/schools, Q&A.

Go behind-the-scenes e.g. the museum stores, the cinema tour, the flour-splattered kitchen.

- Open artist/maker studios
- Artizan tours and trails
- Quirky venues and events
- Creative entrepreneurs
- Coast inspired creativity
- Squirle Arts workshops
- Cookery schools
- Artizan Gallery and pop-ups
- Heritage story e.g. Torre Abbey
- Independent food and drink

PILLAR 4: ARTISANS & MAKERS



Fran147
Bristol, United Kingdom

📄 35 🍷 18



Reviewed 29 August 2018 📱 via mobile

worth it for the craft village

Went to visit on a rainy day, but did not matter as could still enjoy the grounds and village. We parked just up the road in a car park you pay for on the way out and was reasonably priced. Would recommend the craft village to spend some time watching them making items.



nasher_12
Bath, United Kingdom

📄 19 🍷 13



Reviewed 5 weeks ago

An accidental find - what a gem!

Been coming to Goodrington for years but never noticed this little gem. Stumbled upon it this time, as was turned away from another eatery close by at 10.30am for breakfast, so decided to go for a stroll around the boating lake! They served breakfast here until 11.45am so we were onto a winner. We were immediately interested by the different types of breakfast available and decided to go for Mexican Eggs - OMG we were not disappointed. This place serves wonderful food, I was lost for words, with the warm autumn sun beaming on my face I closed my eyes for a second as I took my first bite and I thought for a moment I was in another country, as the different flavours burst into my mouth. This chef knows how to cook, I thought. My daughter had a small breakfast and it was not small. Highly recommend you try it - delicious! The place itself is quirky too with comfortable chairs dotted around, and friendly staff - will definitely return. A perfect ending to another wonderful week in Devon.

PILLAR 4: ARTISANS & MAKERS

☒ Authentic

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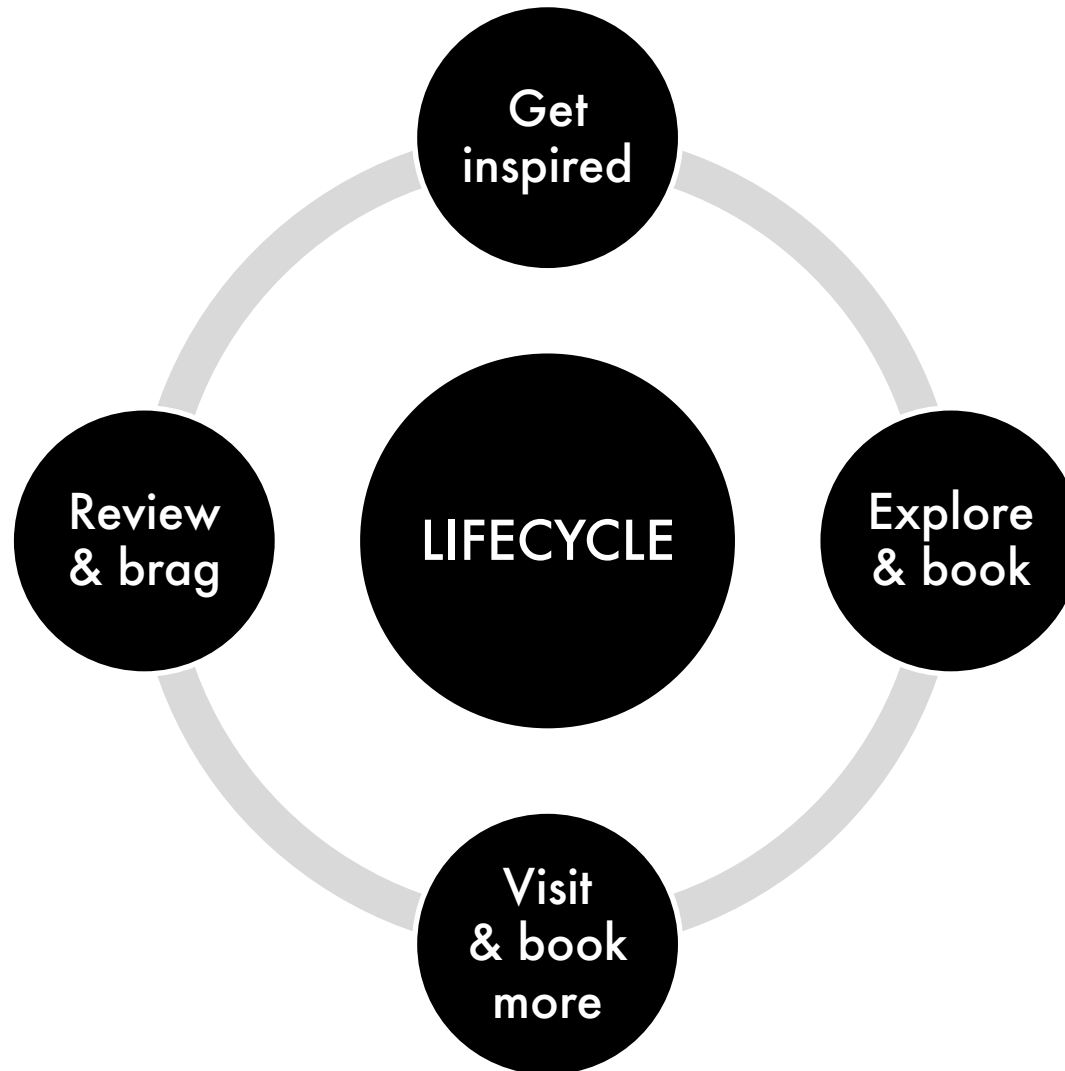
☐ Commercial

☐ Bookable

☒ Measurable

**NEXT STEPS:
FORMATION**

FULL LIFECYCLE PLANNING



DELIVERY CHANNELS

- Don't mess with the beauty: low desire for physical signage and interpretation. It comes with a high capital investment.
- Direction of outputs will be weighted to digital; assets and content that are accessible for everyone to use and distribute.
- With some elements of print - more likely to be limited edition, small runs that cover their cost as keep-able pieces.
- Getting international press and influencers on-board will lead to more visits. Tapping into partner PR support required
- Packages, itineraries and content developed and held online. Then, pitched proactively into VisitBritain, GTOs and Cruises.

FEEDBACK

We welcome and encourage all feedback! We will start to formulate content around the 4 pillars in January to March 2019:

- Comment on this form: <https://goo.gl/hUjy5h>
- Come talk to us any time by phone or in-person
- Get in-touch by email any time

THANK YOU



torbayculture.org

More info, contact:

Lisa Gardiner & Karen Marshall

Cultural Tourism Leads