Contents

1. FOREWORD

Totnes Town Council currently invest in tourism via the Totnes information centre, which is also a resource for local people; over and above this, there is no formal connection to destination management, tourism development and marketing, and wider visitor economy connectivity.

In order to assess the best way to focus financial, time and human resource investment, it is crucial that Totnes Town Council has a clear picture of the strengths of the visitor economy and the tourism offer, the opportunities it faces, and the barriers to development.

McAllister and Co spent time with both staff and councillors to review the current position and to assess options for the future. This paper outlines the outcome of those discussions and poses some options for the future.

2. INTRODUCTION

Totnes is in the heart of South Hams and is a 'crossroads' between Dartmoor, The South Hams beaches and countryside and the busy resort areas of the English Riviera (Torbay). In this key location for visitors, it stands as a strong destination with aesthetic and historic beauty combined with a unique identity and a thriving town centre.

The most recent economic outputs for the visitor economy are:

- 27,000 staying visitor trips
- 438,000 day visits
- £21.5m direct visitor spend
- £22m total visitor related spend
- 490 actual jobs supported by visitor related spend

Staying visits by purpose

UK visitors	Trips	Nights	Spend
Holiday	21,000	84,700	£3,939,300
Business	700	1,500	£355,700
Visits to friends and relatives	2,200	5,800	£317,200
Other	600	1,500	£187,900
Study	0	0	£0
Total	**24,500**	**93,600**	**£4,800,000**

Overseas visitors	Trips	Nights	Spend
Holiday	1,200	5,800	£391,000
Business	100	700	£57,300
Visits to friends and relatives	900	7,100	£291,000
Other	100	1,600	£95,500
Study	0	0	£0
Total	**2,300**	**15,200**	**£834,800**

All staying visitors	Trips	Nights	Spend
Holiday	22,200	90,500	£4,330,300
Business	800	2,200	£413,000
Visits to friends and relatives	3,100	12,900	£608,200
Other	700	3,100	£283,400
Study	0	0	£0
Total	**26,800**	**108,800**	**£5,634,800**

Within Devon, Totnes faces competition from other 'destination' towns and places including Dartmouth, Ashburton and Kingsbridge; as well as Dartington Shops, Bovey Tracey craft centre, Endsleigh Garden Centre. Across the region there are many heritage-rich charming towns that compete for day and staying visitors. The tourism infrastructure across Devon, and regionally, has changed significantly over the recent past, and Totnes is currently somewhat disconnected from this and the potential support it could provide.

The wider tourism landscape shows that nationally there are continued economic challenges but with some modest growth with visitors taking more, but shorter breaks and the staycation continuing to drive an increase in domestic tourism. Opportunities exist as there is now a desire for interesting, unique, social and shareable experiences (as marked by e.g. the growth in coffee shops and music festivals nationally) and a growing significance of digital marketing to converse with consumers.

There has been positive political support for tourism Nationally (as marked by the £5m investment in the region) as a means to regeneration. Equally at a local level, there is the appetite to maintain a level of support for tourism, but there is a need for clarity on how and where this investment is focus.

3. CURRENT POSITION

In order to understand the current position, discussions were held with the Totnes Information Centre (TIC) team and the Totnes Town Council (TTC), to understand the views of all parties in relation to areas of focus, areas of responsibility and where there are potential partnerships or lack of partnership. The discussions also looked at current delivery and vision; what is currently provided, where there are gaps and what could be improved; and what the current issues, barriers, concerns and opportunities are. The discussions also helped to give a clear picture on what the priorities should be, what are the 'nice to haves', what the non-negotiables are – and what should be focused on in the short, medium and long term.

There were many parallels between the points raised, however, the two groups did present some differing views; the TIC teams' views are shaped by visitor enquiries and local knowledge/contacts, whereas the TTC views were informed by wider strategic issues and stakeholder pressures.

ANNEX ONE shows a summary of this analysis with the addition of a subjective scoring system to show the positive or negative significance and impact of points raised.

Key points from this analysis are:

Reasons to visit
Town centre
Quayside and river transit to Dartmouth
Museum
Totnes Castle
Steam Railway
Rare Breeds Farm
Seven Stars Hotel
Language Schools
Other nearby assets include Dartington, Sharpham and Riverford.

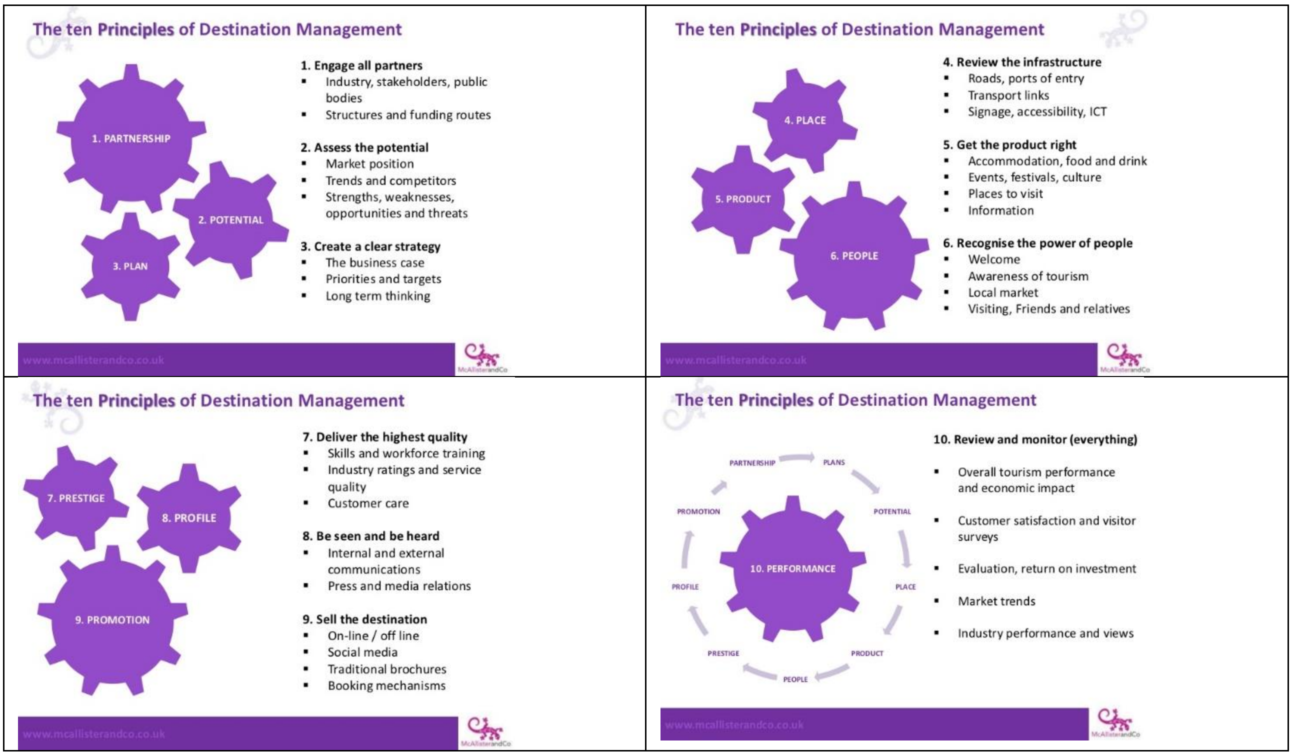
Strengths:	**Weaknesses:**
Retail: Independent retailers, specialist retailers (e.g. Greenlife, Riverford), market, gallery shops and coffee shops, all concentrated in a tight area – a town centre worth visiting. **History and Heritage**: Attractions including Castle and Museum but also the High Street architecture – a very pretty and interesting place to be. **Location and landscape**: Riverside and rolling hill setting and proximity to many popular Devon areas and attractions.	**Product:** Lack of a co-ordinated approach for events and issues around control and succession. Lack of accommodation in the town. **Vision and focus:** Lack of a shared focus and a corresponding tendency for key players to work in isolation. Inertia and tradition restricting a future view. Poor links with tourism networks both in destination and across the region. **Target markets:** Lack of clarity on target markets and opportunities for growth. Lack of clarity around the local vs. visitor role of TIC.

Reputation: A funky, friendly, arty and ethical town with a hint of fantasy. A town that challenges the norm (TTT and Atmos) – something genuinely unique.	**Infrastructure:** Traffic congestion, signage, access/mobility and parking charges all seen as weaknesses. **Communications**: Lack of digital presence and a co-ordinated brand.
Opportunities: **Arts**: Significant potential to develop a strong arts thread to enhance the visitor experience – the focus is more on experience than destination. **Heritage**: Animate the heritage offer - of particular interest to overseas markets. **Events:** Optimise opportunities around existing events and possible new (or resurrected) events. **Welcome:** Engage local community further in welcoming visitors. **Local, regional and national tourism community:** Work closely with the tourism management community to optimise opportunities for promotion and funding - neighbouring districts/counties and regional/national organisations. **Digital:** Information for the digital age - meeting the needs of today's digital customers.	**Barriers:** **Focus:** Meeting diverse and disparate expectations regarding the future tourism focus for the town. **Funding:** Actual funds or the risk aspects of a new investment approach. **Change**: Resistance from stakeholders to change in the destination management /marketing role and service. **Competition**: Significant competition from other destinations and experiences. **Infrastructure**: Engaging stakeholders in the need to resolve critical infrastructure challenges. **Retail:** Maintaining a quality retail experience in the face of significant challenges for this sector.

4. NEXT STEPS

Overall, there is a need to build on this starting position with a clear vision of Totnes as a visitor destination: *Totnes is a town that most of the target audiences will have heard of. Their impression will be one of an interesting and inspiring town that is a pleasure to visit. There will be aware of key reasons to visit and will plan for day trips and/or stays. Their experience will be positive, enlightening and socially rewarding. They will 'take home' unique souvenirs and new ideas.*

The strengths, weaknesses and opportunities clearly identified that Totnes Town Council was in a good position to review activity across the piece in terms of destination management and development for the area, using this exercise as the catalyst to develop a plan for the visitor economy.



The following provides an outline plan with a direction of travel

Point one: Partners
Point two: Plan
Point three: Performance

POINT ONE: Partners

Priorities:

1. Develop a contact list of all businesses/players and key contacts for the above.
2. Engage partners in developing action plans based on the priority areas identified in point two below; leading to
3. Possible formation of a Totnes Tourism Partnership.

4. Clarification of roles, communication, investment, accountability and connections going forward.

Partners identified are

- Chamber of Commerce and Totnes Work Hub
- Shops, town centre group
- Hotel association / accommodation e.g. Seven Stars
- Visitor Attractions
- Heritage interests
- Dartington and Sharpham
- Harbour authority (Dartmouth)
- Transport interests
- Town council and South Hams Council
- Schools and colleges (Kevicc and South Devon College)
- Visit South Devon
- Other tourism groups in Devon

POINT TWO: Plan

The following priorities have been drawn from discussion and subjective scoring (detailed in annex); these are an example of the key areas to base first discussion and action on. These priorities can only be developed, planned and realised within the structure of new partnership arrangements, where there is clarity of roles, responsibilities and investment.

Priorities:

1. Consider key elements of **Destination Development** (infrastructure and product) to address the areas with scope to improve and develop the product/experience offered to visitors.
2. Review the **Welcome** provided, and consider training and ambassadors. The friendly welcome visitors receive is a clear strength and, coupled with the perceived gap in information for various visitor groups, this creates an opportunity for the community to play a greater role in welcoming those visitors.
3. The existing **profile, promotion and brand** appears flat and inconsistent; as against the very positive values and impressions apparent as strengths. The town is underselling itself. There is a need to engage the wider community in supporting and sharing a town brand for visitors. This incorporates the brand vision, a brand personality and brand attributes.
4. What to measure and how to measure? This outline plan would ideally be based on tighter **performance** statistics and targets.

Priority 1: Destination Development

Consider key elements of **Destination Development** (infrastructure and product) to address the areas with scope to improve and develop the product/experience offered to visitors.

Infrastructure development: These can be considered as the 'hard' elements shaping the visitor experience.

- **Transport plan** – a plan to alleviate congestion and avoid negative visitor experiences in finding parking and accessing the town centre.
  - **Action**: research best practice and impact of alternatives including park and ride, tuk-tuks, road trains and parking incentive models.
- **Accommodation** – consider options to increase capacity.
  - **Action:** representation on Atmos group, engaging community in accommodation options e.g. Airbnb.
- **Signage** – clarify problem points and signage gaps, ensuring consistency and maintainence.
  - **Action**: student research project to guide recommendations.
- **Mobile or wifi** – For information gathering and social sharing the ability to access mobile or wifi is critical.
  - **Action:** investigate solutions to enable wider access for visitors.
- **Cycling –** further development of recreational and through route for cyclists.
  - **Action:** liaise with landowners and South Hams

Product development: These can be considered as the 'soft' elements that can shape and improve the Totnes visitor experience.

- **Arts development** – a new drive to raise the profile of local artists and increase opportunities for work to be displayed, experienced and sold. E.g. Art Trail
  - **Action:** Investigate grant funding opportunities and possible partnership working with e.g. Dartington. This to achieve investment in the time of an Arts Development specialist.
- **Event development** – a clear events diary, rejuvenation of the Lantern Festival and possible extension of the Christmas Market.
  - **Action:** map events as 'key' or 'community' and devise strategies to support, develop and/or promote as required. See ANNEX THREE. Formation of a Totnes Events group to aid this process.
- **Music** – increase live music performance.
  - **Action**: designated 'busk-stops'. Busk-buddy schemes (retailers provide power, coffee, loos etc). Feasibility to develop and promote Civic Hall as a music venue.
- **Food** – increasing awareness of and customers for local/artisan/organic food producers.
  - **Action** – food trail, working with producers and Love the Flavour

<u>Priority 2: Welcome</u>

Review the **Welcome** provided, and consider training and ambassadors. The friendly welcome visitors receive is a clear strength and, coupled with the perceived gap in information for various visitor groups, this creates an opportunity for the community to play a greater role in welcoming those visitors.

- **Training –** Many destinations offer, free or at a reduced rate, 'Welcome' training to visitor-facing staff. This has traditionally reached the accommodation and attraction sectors but the impact on visitors to Totnes will be significantly shaped by retail and hospitality staff.

- **Action**: develop and deliver a bite sized course on customer service and product knowledge. Investigate possible funding streams to support this.

- **Ambassadors –** Totnes 'ambassadors' could be uniformed volunteers that meet and greet boat and coach passengers to engage interest, increase visitation at the Museum/Castle and increase the length of stay in the town. A successful scheme could be expanded to assist visitors at key points such as the Brutus stone.
    - **Action:** Liaise with boat and coach companies, recruit a core team and support with training, uniforms, supporting print and administration of rotas.

Priorty 3: Profile, promotion and brand

The existing **profile, promotion and brand** appears flat and inconsistent; as against the very positive values and impressions apparent as strengths. The town is underselling itself. There is a need to engage the wider community in supporting and sharing a town brand for visitors. This incorporates the brand vision, a brand personality and brand attributes.

- **Brand vision –** Totnes is a town that most of the target audiences will have heard of. Their impression will be one of an interesting and inspiring town that is a pleasure to visit. There will be aware of key reasons to visit and will plan for day trips and/or stays. Their experience will be positive, enlightening and socially rewarding. They will 'take home' unique souvenirs and new ideas.
- **Brand personality –** using many of the positive words suggested by the TIC and TTC groups we are looking at a brand that helps to describe the town as funky, unique, ethical, and arty as well as beautiful and historic.
- **Brand attributes –** continued use of the castle coat of arms but an agree colour palette and style of wording to echo the personality. The role of imagery is important here. Wherever possible this brand should be extended to signage, print and digital communications
    - **Actions:** design investment in core brand identity and website. Copywriting guidance for all digital and traditional communications. Establish image bank.

- **Promotion –** With the above destination, people and brand in place the task then becomes one of raising the game to increase the volume and value of visitors. The three clear elements of this are target market, messages and media. The table below explores options for three broad target markets.
    - **Action**: develop into a detailed communications plan showing month by month actions, costs and responsibilities based on the table below.

Target market	**Messages**	**Media**
Day visitors: ABC1 (see ANNEX FOUR) adults within a 1 hour drive time visiting for the day or to attend special events. The age range is approximately 25-55 and this therefore includes young professional couples and	A focus on event information and Town stories. Some interesting snippets about history.	▪ Local PR ▪ Social media profile and themes #Totnes #TotnesHour ▪ Website – building better links with commercial partners to provide engaging content.

older empty-nester couples. Some of the former will have young family but the town is not seen as a family destination. They will enjoy the town ambience and will be keen to relax, soak up the atmosphere, browse shops and find stories to share.		▪ Data capture and direct email
Staying visitors: Again ABC1 adults but a slightly older profile. They may be staying in the town or at e.g. Dartington. They may be visiting for a specific purpose (e.g. a course or an event) but may also be touring the SW. This will include a portion of international visitors.	As above but with the addition of good forward information on events. Good information links with Dartington and other key attractors in the hinterland. Suggested self-guided tours based on arts and literature themes.	▪ Website (possible translations) ▪ Developing online content with partners From Visit South Devon through to VisitBritain ▪ UK and international PR ▪ Visitor Information services ▪ Data capture and direct email
Day visitors – coach: C1C2 55+. This visitors are likely to be touring from a base in Torbay. Their priorities are sight-seeing and shopping. Engaging information and easy access to viewing points, cafes and shops is key. Day visitors – River Boats. A similar approach but a wider demographic.	The channel for these visitors is largely through the coach companies and their drivers. The message is therefore one of a warm welcome and helpful 'ambassadors' to issues information and guide the best use of their brief visits	▪ Information leaflets for drivers/skippers ▪ direct mail to coach tour managers ▪ direct liaison with River Boat company ▪ town maps for passengers

The above suggests that the role of a full printed guide is limited and that, if commercially viable, this could be sub-contracted.

POINT THREE: Performance

- **Performance –** What to measure and how to measure? This outline plan would ideally be based on tighter performance statistics and targets. With limited data available, consideration should still be given to establishing baseline measures for factors that describe what success for this plan looks like.
  - **Action:** Agree core measures, set in place processes to monitor and measure and engage colleges for research support

There is scope here to build relationships with Kevicc and South Devon College to engage students in research projects. Below are possible measures

Outcome	**Measure**
Strategy	Funds accessed Businesses engaged
Transport and parking	Monitor complaint levels
Accommodation	Additional rooms available
Arts	Artists engaged with events, galleries or open studios
Music	Civic Hall bookings
Ambassadors	Number recruited Number of visitors engaged (coaches/individuals)
Welcome training	Numbers trained Researched assessment of visitor perceptions
Promotion	Website hits Social media shares/likes/follows PR coverage
Core performance measures	Coach numbers Retail ‘how’s business’ and shop vacancies Car parking income/occupancy Accommodation occupancy Estimated visitor numbers

ANNEX ONE: Strengths and Weaknesses

The impact score is an arbitrary assessment of the significant of strength and weakness factors.

Strengths	**Impact -3 to +3**	**Potential actions**
Individual shops	+3	Work closely with retailers to develop opportunities & PR
Destination shops e.g. Greenlife	+1	As above & PR
Christmas market	+2	Extend dates?
Outdoor activities e.g. Dartmoor, walks, wild swims	+1	
Markets Friday and Saturday	+3	Liaison with markets / S.Hams
Arty shops and galleries	+2	Joint working/promotions, trails and events
History and heritage	+3	Promotion, heritage group, town heritage trails
Reputation: Funky - Narnia Different - unique, groovy vibe Ethical consciousness	+3	Brand building Engaging partners in branding
Beautiful - photogenic town buildings Beautiful natural - riverside	+2	Image bank Networking to build same
Profile raised by Transition Town Totnes	+1	Integrate and embed tourism in TTT
Atmos, brownfield site - newsworthy?	+1	Ensure that there is something for visitors to see/browse, feel part of. Ensure national new profile (Compare with e.g. Poundbury)
Rail connection - mainline station Community transport	+1	Promotion and lobbying
Location - link between coast and moor	+1	Partnership working, developing area tours, trails and PR
Community, friendliness	+2	Supporting development of 'welcome'
Small enough to walk around in a day	+2	Guided and self-guided tours
Commitment to fund TIC/tourism	+3	Ensure value for money
Dartington – high profile brand/events (and Sharpham)	+2	Closer working partnership
Language Schools	+1	

Weaknesses	**Impact -3 to +3**	**Potential actions**
Lack of profile for existing events	-2	Event diary and promotion
Management of the market?	-1	More competitive comparison and development proposals
People and organisations working in isolation	-3	Clear planning, support and roles
Lack of digital presence	-3	Skills and partnerships
Confusion over role of tic	-3	Improve data and clarify commitments
Transport connections	-2	Not clear which elements of transport were weakness? Signage?
Not enough for children/families	-1	Accept not a priority target Maybe develop a childrens story of e.g. Trixie the TT dog
Too many charity shops	-2	Working with retailers to support commercial retail. Getting the balance right
TIC (50:50 split in tic local/visitors) lack of data, focus on target markets and fit of product/services to market need.	-3	Review return on investment and consider alternative strategies to tourism development and management
SHams parking charges - expensive deterrent for retail	-2	Work with S Hams to investigate and discuss retail/parking incentive models, best practice.
Inertia and tradition	-1	
Lack of accommodation	-2	Work with partners to lobby LEP for accommodation survey. Working with neighbouring destinations for day visit market
Dartington – lack of integration	-1	Closer working partnership
Tides – changing services/boats	-1	
Access/mobility	-2	
Traffic congestion	-2	
Lack of an adequate photolibrary	-2	Engage photographers (free use with credits) Competition to gather visitor images (with free use)

ANNEX TWO: Opportunities and priorities.

This is a subjective assessment in which the feasibility of an action to achieve results, multiplied by an assessment of the potential impact of this action, resulting in an overall priority score.

Opportunities discussed	**Potential actions**	**Feasibility 0-3**	**Positive Impact 0-3**	**Priority score**
Strategy and vision	Clear plan with shared priorities and deliverable action plans	3	3	9
Arts development	Arts officer – to coordinate and develop arts, music	2	2	4
Arts and music	Busking - festival and busking stops	3	2	6
	Civic hall as a venue - music - biggest venue between Plymouth and Exeter (except Torbay)	1	2	2
	Art trail	3	1	3
Creative industries	Encourage and develop	2	1	2
Transport plan	park and ride, tuktuks, vintage bus shuttle, parking incentives/models	2	2	4
Longer stop-offs in the town for boat pax,	Partnership working, development of welcome, guides/ambassadors	3	2	6
Coach tour ops	As for boats	3	2	6
Events	Revive lantern procession (best practice Truro City of Lights)	3	2	6
	Rejuvenate Elizabethan Tuesdays (But does this fit with brand?)	2	1	2
Accommodation	Lobby for hotel at Atmos?	2	3	6
Funding	Introduce alternative funding models and commercial contribution (c.w. Dean and Wye) BID?!	2	3	6
	Apprenticeship programme	3	1	3
	School/college project partnerhsips			
Wider hinterland	Partnership working on e.g. art trails	3	2	6
Cycling	National cycling route: promotion, resolving bridge access and broader development of routes and supporting product	1	2	2

Heritage	Group working and promotion	3	1	3
Broadband and wifi	Continue lobbying for improved signals	1	3	3
	Commercial open wifi	3	2	6
Digital	Commerical partners develop #Totnes #Totneshour Digital Champions Social media training	3	3	9
Promotion	Strategies for website, PR, data capture and email marketing, promotional print (possible outsourcing)	3	3	9
Information hubs	Touch screens or leaflet points			
Representation in tourism structures	Delegate individuals, priorities and roles. Ensure appropriate feedback systems Engage in current funding programmes (Visit England £5m)	2	2	4

ANNEX THREE: Event Strategies Model

Event type	Example	Strategies
Key An event which has the potential to attract visitors from other parts of the UK (and beyond) – a reason to visit and stay.	New Lantern Festival	▪ Designate as a 'key' event ▪ Liaise to forward plan dates 2016/17 ▪ Allocate support resources to event organisers e.g. meeting facilities ▪ Seed funding and/or grant bids (perhaps in conjunction with Arts Development role) ▪ Lobby for cross support from District Council for e.g. road closures, signage ▪ PR planning for optimum exposure ▪ High profile digital presence on website and social media
Community An event which attracts mainly the local community.	Duck Race Raft Race	▪ Listing in overall Town What's On website ▪ Event planning and promotion guidance ▪ Digital presence on website and social media ▪ Support for wider OR where appropriate

ANNEX FOUR: Sociodemographics

National Readership Survey Social Grade descriptors

Social Grade of Chief Income Earner

Social Grade	Description	% population
A	High managerial, administrative or professional	4
B	Intermediate managerial, administrative or professional	23
C1	Supervisory, clerical and junior managerial, administrative or professional	29
C2	Skilled manual workers	21
D	Semi and unskilled manual workers	15
E	State pensioners, casual or lowest grade workers, unemployed with state benefits only	8

Source: NRS 2008 (unweighted sample 37,359, estimated population 15+ (000s) 49,077

Source: https://www.ipsos-mori.com/DownloadPublication/1285_MediaCT_thoughtpiece_Social_Grade_July09_V3_WEB.pdf