



Étude de cas n°2 : la croisière Case study 2: The Cruise Industry

Restitution de l'étude réalisée pour le port de Tor Bay : quel potentiel et
quelles conditions pour la croisière en Manche ?
Feedback from the Tor Bay study: what potential and how to increase cruise
visits in the Channel area?

Captain Kevin Mowat
Executive Head
Tor Bay Harbour Authority

La Diversification Économique des Ports Locaux et Régionaux
Economic Diversification in Local and Regional ports

Saint Brieuc – Mercredi 4 Février 2015



European Regional Development Fund
The European Union, investing in your future



Fonds européens de développement régional
L'union Européenne investit dans votre avenir



Session 2:

La diversification économique des trafics dans les ports locaux

Diversification of economic activities and trade flows and in local ports

La Diversification Économique des Ports Locaux et Régionaux Economic Diversification in Local and Regional ports

Saint Brieuc – Mercredi 4 Février 2015



European Regional Development Fund
The European Union, investing in your future



Fonds européen de développement régional
L'union Européenne investit dans votre avenir

FLIP Workshop - Saint-Brieuc
4th February 2015

**Tor Bay Harbour – Cruise Study
Maximising Economic Benefits
for Small & Medium Sized Ports
in the Channel Area**

Kevin Mowat

Executive Head, Tor Bay Harbour Authority

Tor Bay Harbour Master

STUDY OBJECTIVES

- To assess the constraints and opportunities for Tor Bay Harbour to increase its share of the Northern European cruise tourism market by understanding the industry requirements
- Produce a realistic assessment of a new cruise growth market for Tor Bay (Torquay) with the potential outcome to generate significant additional visitor expenditure to support and grow the local economy

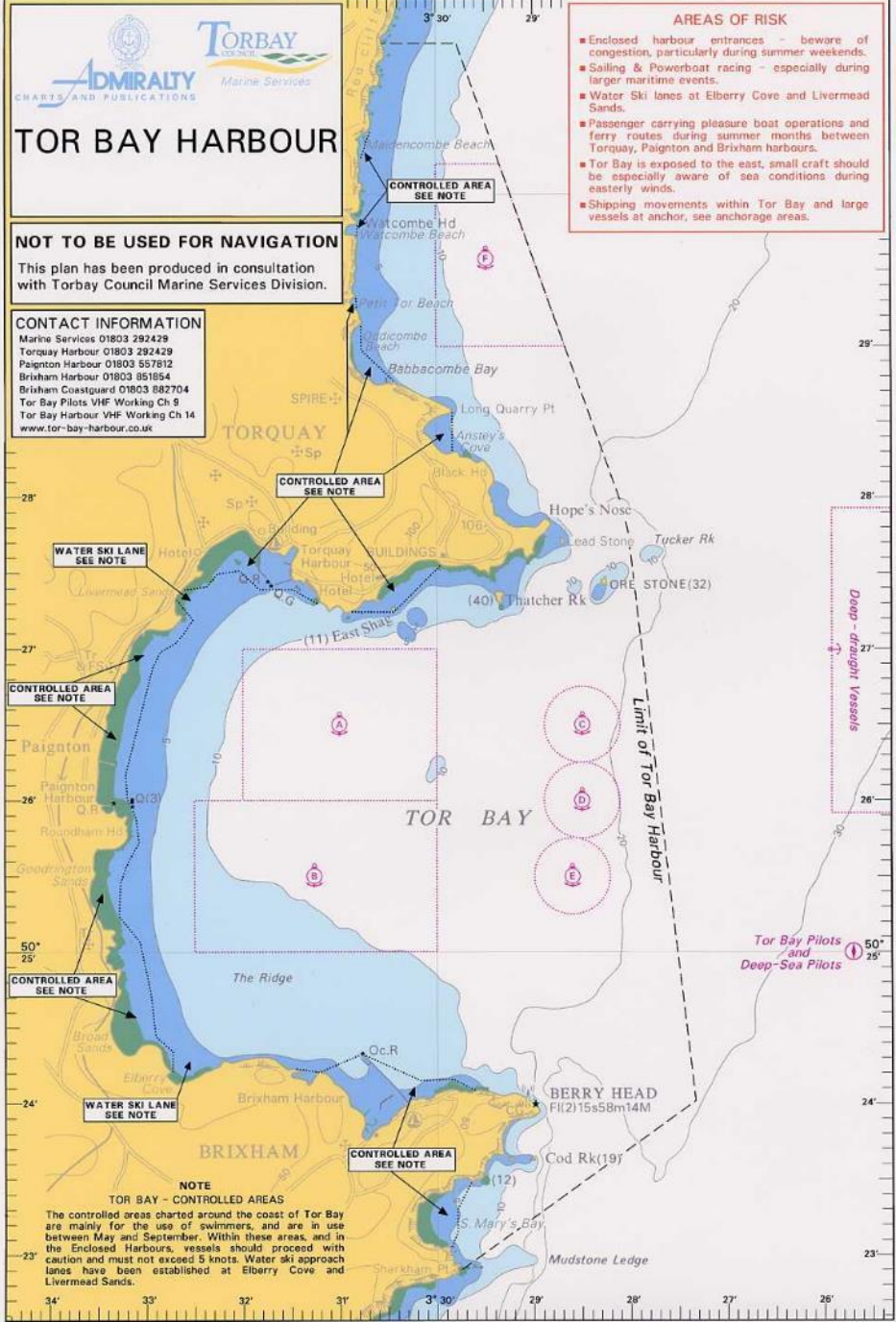
PRESENTATION CONTENTS

- Tor Bay Harbour as a Cruise Destination
- The European Cruise Market
- Analysis of Tor Bay as a Cruise Port
- Existing & Potential Cruise Market
- Local Tourism Product for Shore Excursions
- Economic Impact of the Cruise Business
- Summary and Recommendations

NOT TO BE USED FOR NAVIGATION
This plan has been produced in consultation with Torbay Council Marine Services Division.

CONTACT INFORMATION
Marine Services 01803 292429
Torquay Harbour 01803 292429
Paignton Harbour 01803 557812
Brixham Harbour 01803 851854
Brixham Coastguard 01803 882704
Tor Bay Pilots VHF Working Ch 9
Tor Bay Harbour VHF Working Ch 14
www.tor-bay-harbour.co.uk

- AREAS OF RISK**
- Enclosed harbour entrances - beware of congestion, particularly during summer weekends.
 - Sailing & Powerboat racing - especially during larger maritime events.
 - Water Ski lanes at Elberry Cove and Livermead Sands.
 - Passenger carrying pleasure boat operations and ferry routes during summer months between Torquay, Paignton and Brixham harbours.
 - Tor Bay is exposed to the east, small craft should be especially aware of sea conditions during easterly winds.
 - Shipping movements within Tor Bay and large vessels at anchor, see anchorage areas.



Tor Bay Harbour as a Cruise Destination

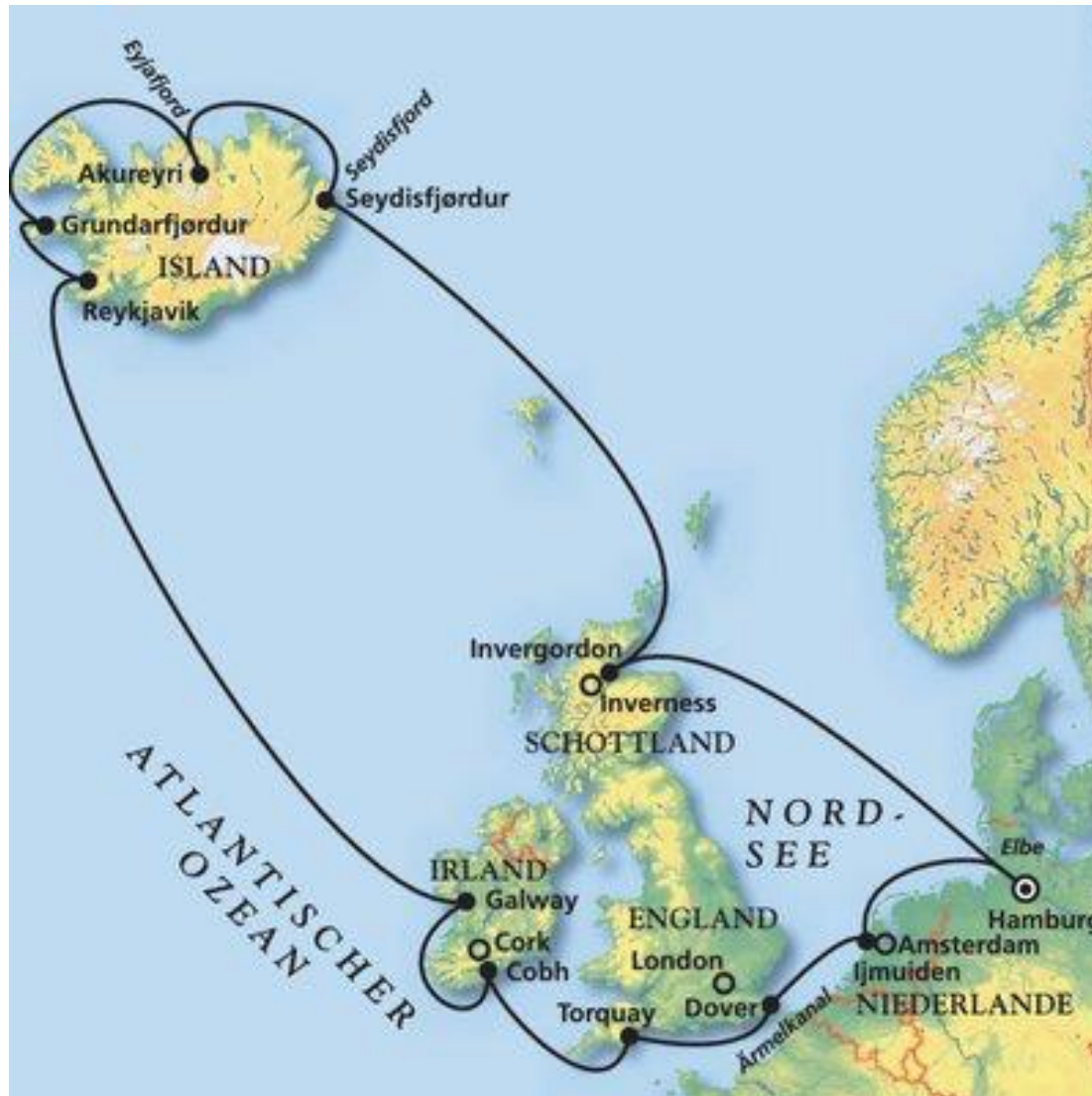
- Sheltered Anchorage
- Modern disembarkation and embarkation facility
- Restricted by no alongside berthing
- Unsuitable as a turnaround port
- 24 cruise ship visits in the last 12 years
- 15,900 passengers & 7,600 crew

The European Cruise Market

- Growth of 43% since the economic downturn in 2008
- Passengers on day trips to UK's 51 cruise ports – up by 20% in 2013 to 866,000
- Increasing popularity in Northern Europe as a destination
- Threat from increasing regulations – ECAs (Emission Control Areas)

Analysis of Tor Bay as a Cruise Port

- Strategically placed for Round Britain, Trans-Atlantic and Northern European cruises
- Located 100 miles from Southampton and 200 miles from Dover
- Culture & authenticity -v- sunshine & pools
- Not suitable for 'mega' ships i.e. 2,000 plus
- Anchor position $\frac{3}{4}$ mile SE of Torquay
- Only a 10 minute tender journey



Typical example of a
North European
Cruise – 5 countries
in 15 days – MS
Amadea 2015

Existing & Potential Cruise Market

- Dutch & German visitors are drawn by the natural landscape of Dartmoor & coastal walks
- Literary links - Agatha Christie & Rosamunde Pilcher
- Potential to attract high value tourists on smaller ships
- Need to focus on the quality, culture & emotional experience

Local Tourism Product for Shore Excursions

- English Riviera – UN Global Geopark
- Steam Train & Cream Tea
- Exeter City & Cathedral
- Agatha Christie's Greenway House
- Coast, Country & Powderham Castle
- Plymouth, Dartmoor & Buckland Abbey
- Golf – Bovey Castle & Dartmouth Clubs

Economic Impact of the Cruise Business

- 30 to 45% of passengers take excursions
- Remaining passengers & crew spend locally
- Multiplier effect – every £1 spent = £0.44 of additional related spend in the local economy
- In 2013 Torquay saw 6 cruise ship visits with 5,073 passenger & 2,583 crew
- Total local spend = £300,000 + £25,000 in harbour dues

Summary and Recommendations

- Target UK & European Cruise Operators
- Seek guidance from Cruise itinerary planners
- Improve on-line Tor Bay Cruise information
- Develop the port's 'Warm Welcome' product
- Investigate 'Cruise Destination Quality Mark'
- Consider extending potential alongside berth
- Undertake surveys to gauge economic impact
- Consider future EU funding bid

Tor Bay Harbour – Cruise Study

Merci
Thank You

www.tor-bay-harbour.co.uk



The INTERREG IV(a)
Fostering Long Term Initiatives in Ports seminar / workshop

La Diversification Économique des Ports Locaux et Régionaux

Economic Diversification in Local and Regional ports

Saint Briec – Mercredi 4 Fevrier 2015



European Regional Development Fund
The European Union, investing in your future



Fonds européen de développement régional
L'union Européenne investit dans votre avenir