

The Economic Impact of Devon's Visitor Economy 2019

Torbay



Produced on behalf of the Devon Tourism Partnership
By
The South West Research Company Ltd



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Introduction

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in Torbay and Devon county in 2019. It should be noted that not all districts within the county have taken part in this project this year and as a result the district breakdowns refer only to those participating. Full county figures are available from page 17 of this report.

The figures were derived using the Cambridge Economic Impact Model undertaken by The South West Research Company (TSWRC). The model utilises information from national tourism surveys and regionally/locally based data. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level.

For further information on the Cambridge Model and the terms used in this report please see Appendix 1 which accompanies this report.

For an overview of 2019, including key facts about the economy, weather and key events please see Appendix 2 of this report.

Value of Tourism 2019

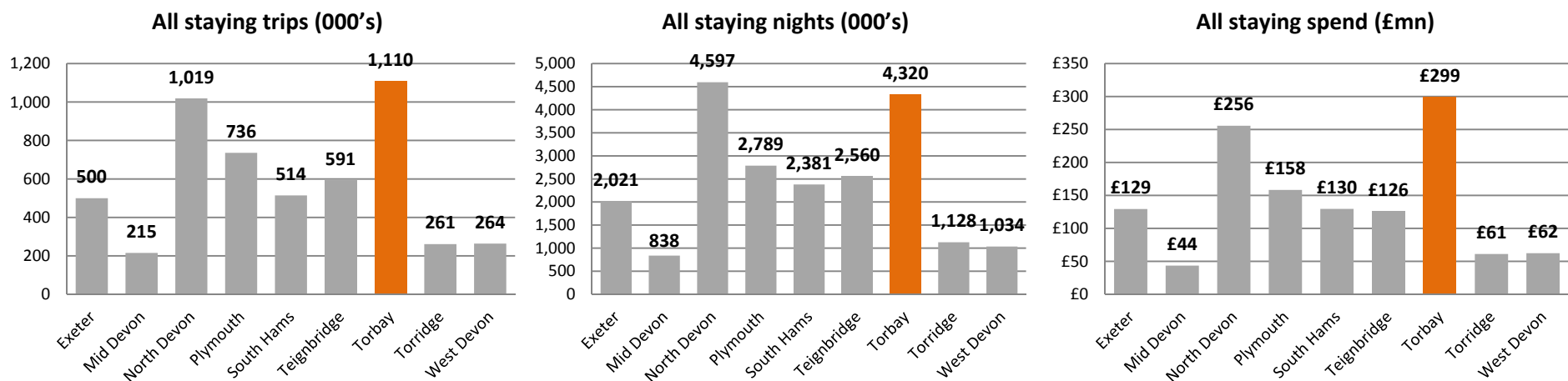
Torbay

Key Facts	
1,110,100	Staying visitor trips
4,320,300	Staying visitor nights
£298,695,000	Staying visitor spend
3,434,000	Day visits
£124,122,000	Day visitor spend
£422,817,000	Direct visitor spend
£10,181,000	Other related spend
£432,998,000	TOTAL VISITOR RELATED SPEND
10,123	Estimated actual employment
7,458	FTE employment
17%	Proportion of all employment

Torbay – Staying visits

Information on staying visits is derived from the Great Britain Tourism Survey (GBTS) for domestic visitors and from the International Passenger Survey (IPS) for Overseas visitors. Data at a county level is derived from the national surveys for trips, nights and spend but adjusted to account for local data and modelled below this level.

Torbay - Staying visits in the county context



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Exeter	442	58	1,442	579	£92	£37
Mid-Devon	196	19	706	132	£37	£6
North Devon	961	58	4,248	349	£234	£21
Plymouth	658	78	2,139	650	£121	£37
South Hams	480	34	2,130	251	£115	£14
Teignbridge	554	37	2,312	248	£113	£12
Torbay	1,020	90	3,784	536	£263	£36
Torrige	242	19	994	134	£54	£7
West Devon	241	23	888	146	£54	£9

Torbay - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	510,000	1,463,000	£149,104,000
Self catering	104,000	589,000	£42,748,000
Touring caravans /tents	40,000	209,000	£7,294,000
Static vans/holiday centres	159,000	786,000	£39,631,000
Group/campus	1,000	3,000	£169,000
Paying guest in private homes	0	0	£0
Second homes	13,000	66,000	£1,931,000
Boat moorings	9,000	41,000	£2,036,000
Other	7,000	12,000	£553,000
Staying with friends and relatives	177,000	615,000	£19,525,000
Total	1,020,000	3,784,000	£262,991,000

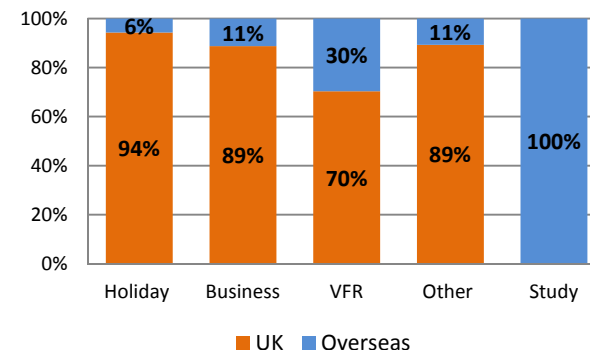
Overseas tourists	Trips	Nights	Spend
Serviced	58,400	210,700	£20,215,000
Self catering	4,100	38,800	£2,802,000
Touring caravans /tents	1,800	9,700	£493,000
Static vans/holiday centres	700	4,200	£223,000
Group/campus	300	5,100	£376,000
Paying guest in private homes	4,600	95,500	£5,109,000
Second homes	300	6,200	£377,000
Boat moorings	0	0	£0
Other	1,800	10,300	£321,000
Staying with friends and relatives	17,900	155,700	£5,788,000
Total	90,100	536,300	£35,704,000

Torbay - Staying visits by purpose

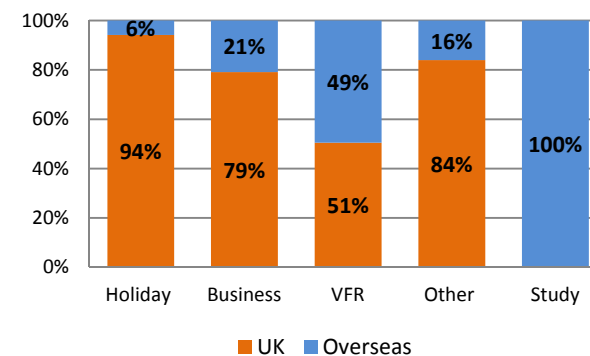
Domestic tourists	Trips	Nights	Spend
Holiday	870,000	3,462,000	£229,618,000
Business	90,000	152,000	£21,878,000
Visits to friends and relatives	50,000	136,000	£9,608,000
Other	10,000	34,000	£1,887,000
Study	0	0	£0
Total	1,020,000	3,784,000	£262,991,000

Overseas tourists	Trips	Nights	Spend
Holiday	52,600	214,400	£20,357,000
Business	11,400	40,100	£3,205,000
Visits to friends and relatives	21,100	133,200	£6,344,000
Other	1,200	6,500	£579,000
Study	3,800	142,200	£5,219,000
Total	90,100	536,300	£35,704,000

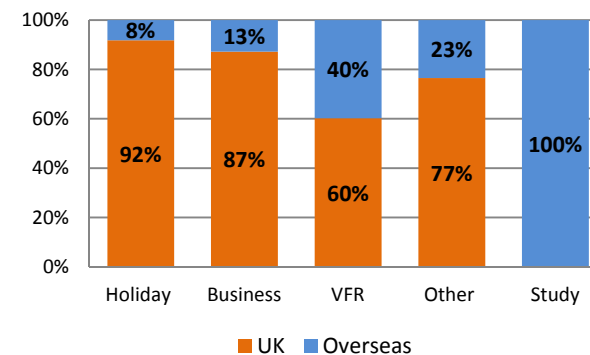
Trips



Nights



Spend

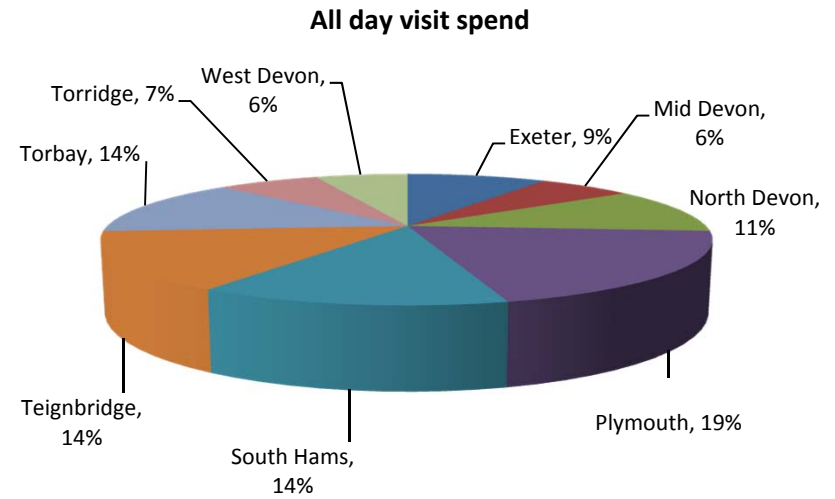
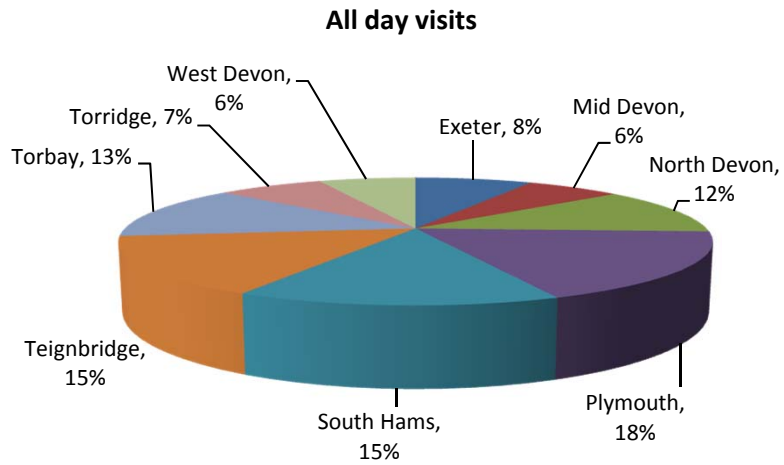


Torbay – Day visits

Information on day visits within this report has been derived from the 2019 Great Britain Day Visit Survey (GBDVS). The survey, which was first undertaken in 2011, provides a much needed update on day visit activity in Great Britain and generally speaking estimated greater frequencies of trip taking than the previous day visit survey (England Leisure Visits Survey 2005). As a result of the new methodology in 2011 comparisons with previous day visit estimates are not possible.

The GBDVS distinguishes between day visits to a town or city; to the seaside and coast; and to the countryside. Different drivers are used within the model to distribute these trips. Local 'drivers' such as attraction footfall, quality and size of countryside and coastline are factored into the model for this purpose.

Torbay - Day visits in the county context

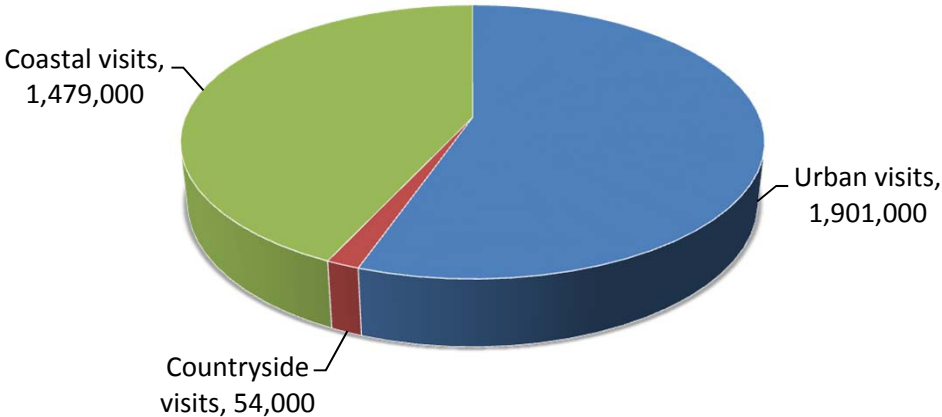


Area	Day visits	Day visit spend
Exeter	2.0	£81.3
Mid-Devon	1.6	£54.8
North Devon	3.0	£100.3
Plymouth	4.5	£175.8
South Hams	3.7	£122.2
Teignbridge	3.8	£130.6
Torbay	3.4	£124.1
Torrige	1.8	£59.1
West Devon	1.6	£53.9

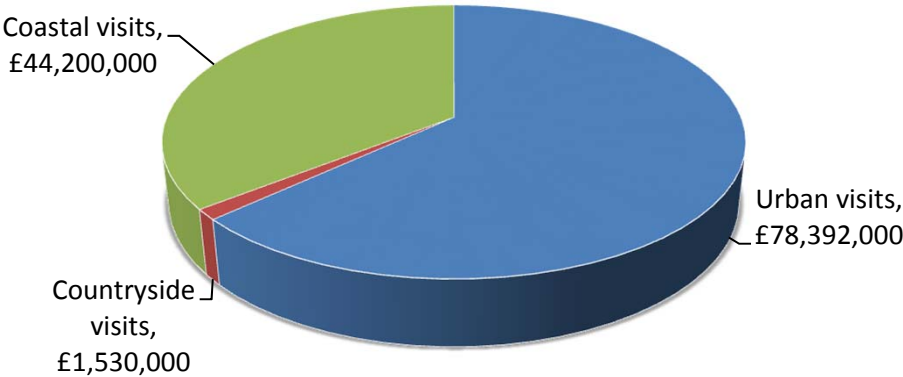
Torbay - Day visits by location

Total day visits	Total day visit spend
3,434,000	£124,122,000

Day visits



Day visit spend



Torbay - Direct visitor expenditure by category

Information on the breakdown of visitor spending is available from the three main tourism and day visitor surveys by type of visitor. The Model divides the expenditure between five sectors:

- Accommodation
- Shopping for gifts, clothes and other goods
- Eating and drinking in restaurants, cafes and inns
- Entry to attractions, entertainment and hire of goods and services
- Transport and travel costs including public transport, purchase of fuel and parking

The following pages look at the breakdown of this expenditure and business turnover arising from this expenditure.

By applying the expenditure breakdown to the estimates of visitor spending the Model generates estimates of total spending by the five business sectors. Visitor expenditure in each sector represents additional turnover for businesses in those sectors. However, evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover. In particular, some expenditure on food and drink actually takes place in inns and hotels that fall into the accommodation sector and at attractions. The turnover for each business sector has therefore been adjusted to take account of these marginal changes. More significantly, expenditure on travel costs associated with individual trips is as likely to take place at the origin of the trip as it is at the actual destination. It is therefore assumed that only 60% of total travel expenditure accrues to the destination area.

Torbay – Direct visitor expenditure by category



Accommodation

- UK staying visitors £99,416,000
- Overseas staying visitors £10,948,000



Shopping

- UK staying visitors £33,080,000
- Overseas staying visitors £10,126,000
- Day visitors £39,217,000



Food & drink

- UK staying visitors £58,163,000
- Overseas staying visitors £7,650,000
- Day visitors £52,770,000



Attractions/entertainment

- UK staying visitors £28,132,000
- Overseas staying visitors £3,648,000
- Day visitors £12,510,000



Travel

- UK staying visitors £44,201,000
- Overseas staying visitors £3,332,000
- Day visitors £19,625,000

Torbay – Other visitor related expenditure by category



Second Homes

£905,000



Boats

£2,190,000



Visiting friends and relatives (non-visitor spend)

£7,086,000

- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay with them.

Torbay – Tourism related employment

Having identified the value of turnover generated by visitor spending in each business sector it is possible to estimate the employment associated with that spending.

The use of visitor expenditure to generate job numbers underestimates the number of jobs arising in the attractions/entertainment sector. The underestimate arises because local authorities and voluntary bodies do not always seek to recoup the full operating costs of individual attractions or facilities from entrance charges. Therefore an additional percentage of direct employment is added to the attractions sector estimates to take account of this factor.

This section of the report looks at employment on three levels;

- **Direct Jobs** - Direct jobs are those in businesses in receipt of visitor spending. For example, jobs supported by visitor spending at a hotel would be direct jobs.
- **Indirect Jobs** - Indirect employment arises as a result of expenditure by businesses in direct receipt of visitor expenditure on the purchase of goods and services for their businesses. For example, some of the employment at a business supplying food and drink may be supported through the supplies that the business sells to hotels (or any other business in direct receipt of visitor expenditure).
- **Induced Jobs** - Induced jobs are those that are supported by the spending of wages by employees in direct and indirect jobs. Such spending will be spread across a wide range of service sectors.

Estimates are shown for actual jobs and full time equivalent jobs (FTE's).

Torbay – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)

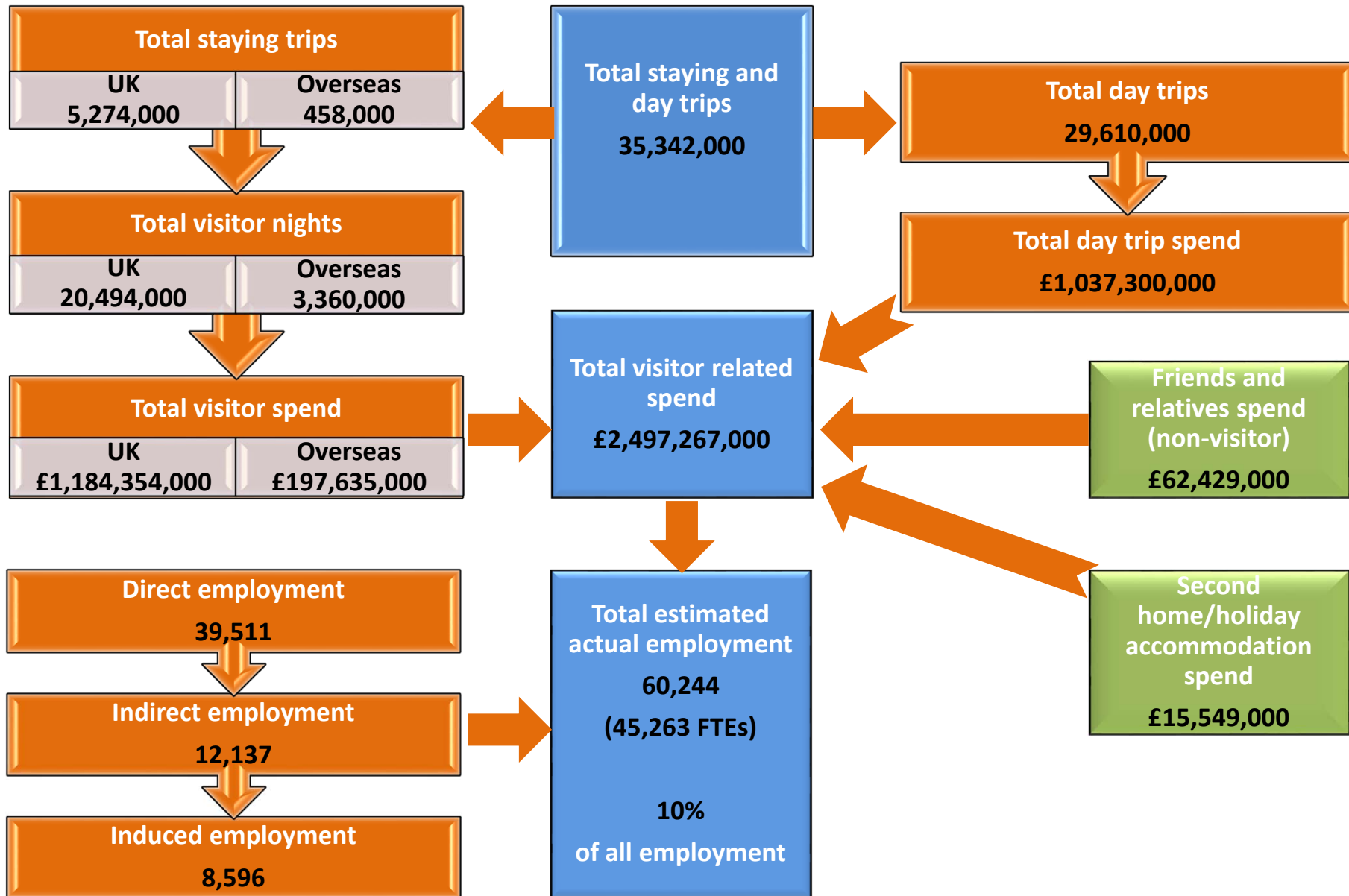


Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	1,574	15	1,589
Retailing	354	321	676
Catering	851	683	1,534
Attractions/entertainment	552	226	778
Transport	197	81	278
Arising from non trip spend	158	0	158
Total Direct	3,687	1,326	5,013

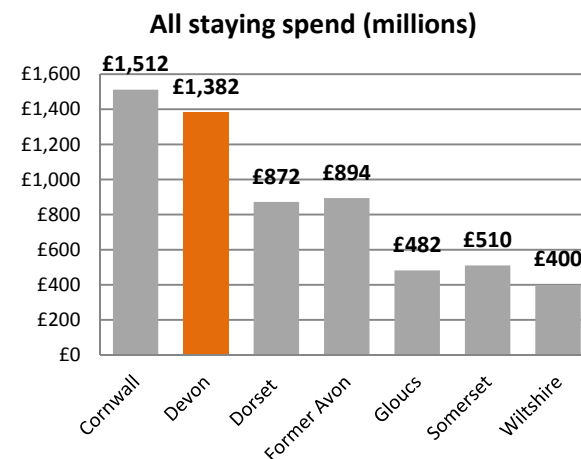
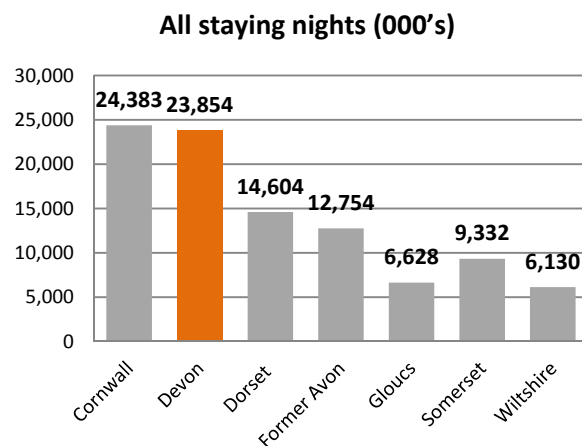
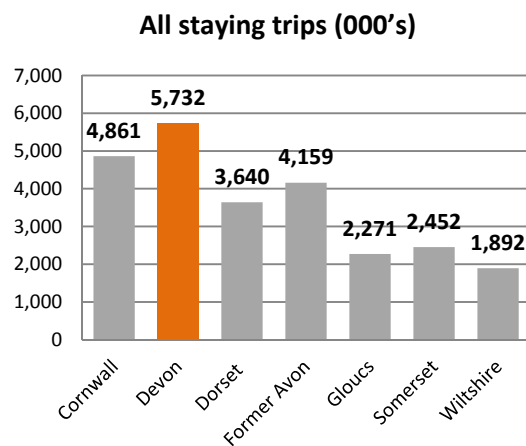
Devon 2019



Devon - Key facts at a glance



Devon - Staying visits in the regional context



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cornwall	4,476	385	21,780	2,603	£1,347	£165
Devon	5,274	458	20,494	3,360	£1,184	£198
Dorset	3,283	357	11,370	3,234	£666	£207
Former Avon	3,106	1,053	6,822	5,932	£513	£381
Gloucestershire	1,984	287	4,689	1,939	£335	£146
Somerset	2,207	245	7,603	1,729	£419	£91
Wiltshire	1,572	320	4,288	1,842	£290	£110

Devon - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	1,660,000	4,760,000	£484,994,000
Self catering	526,000	2,988,000	£217,038,000
Touring caravans /tents	577,000	3,047,000	£106,107,000
Static vans/holiday centres	641,000	3,160,000	£159,343,000
Group/campus	100,000	280,000	£15,674,000
Paying guest in private homes	0	0	£0
Second homes	120,000	600,000	£17,451,000
Boat moorings	29,000	137,000	£6,855,000
Other	59,000	105,000	£4,876,000
Staying with friends and relatives	1,561,000	5,418,000	£172,016,000
Total	5,274,000	20,494,000	£1,184,354,000

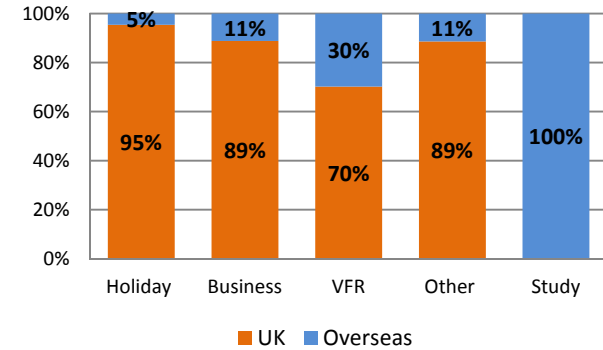
Overseas tourists	Trips	Nights	Spend
Serviced	190,000	685,000	£65,756,000
Self catering	21,000	197,000	£14,225,000
Touring caravans /tents	26,000	141,000	£7,171,000
Static vans/holiday centres	3,000	17,000	£897,000
Group/campus	25,000	471,000	£34,758,000
Paying guest in private homes	16,000	329,000	£17,596,000
Second homes	3,000	56,000	£3,408,000
Boat moorings	0	0	£0
Other	16,000	91,000	£2,831,000
Staying with friends and relatives	158,000	1,372,000	£50,994,000
Total	458,000	3,360,000	£197,635,000

Devon - Staying visits by purpose

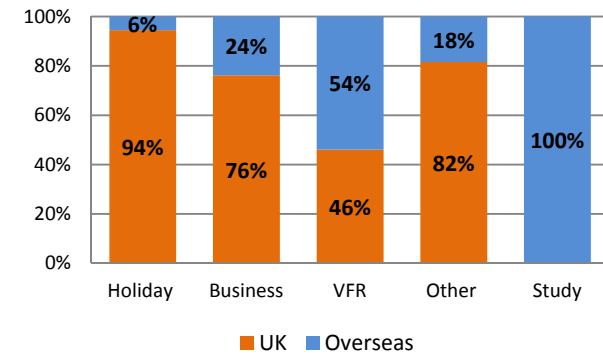
Domestic tourists	Trips	Nights	Spend
Holiday	4,462,000	18,436,000	£1,034,386,000
Business	287,000	502,000	£61,025,000
Visits to friends and relatives	439,000	1,243,000	£74,346,000
Other	86,000	314,000	£14,597,000
Study	0	0	£0
Total	5,274,000	20,494,000	£1,184,354,000

Overseas tourists	Trips	Nights	Spend
Holiday	213,000	1,073,000	£94,835,000
Business	36,000	157,000	£11,736,000
Visits to friends and relatives	186,000	1,453,000	£64,450,000
Other	11,000	71,000	£5,885,000
Study	13,000	606,000	£20,730,000
Total	458,000	3,360,000	£197,635,000

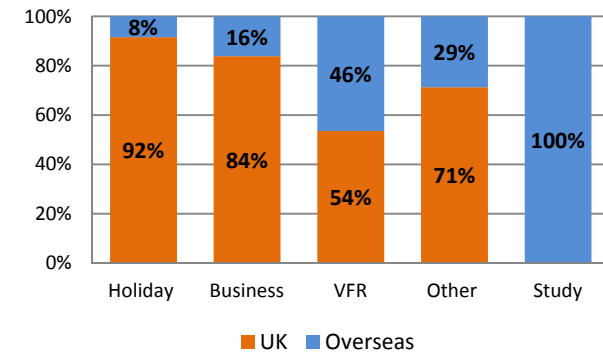
Trips



Nights

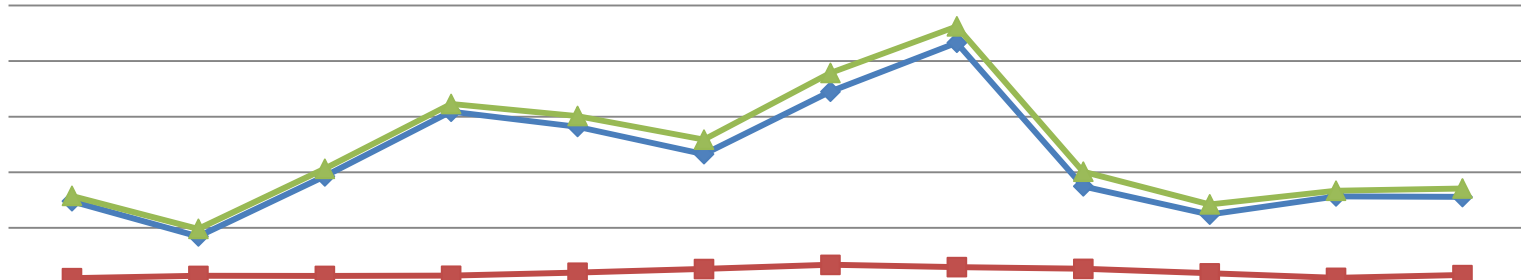


Spend



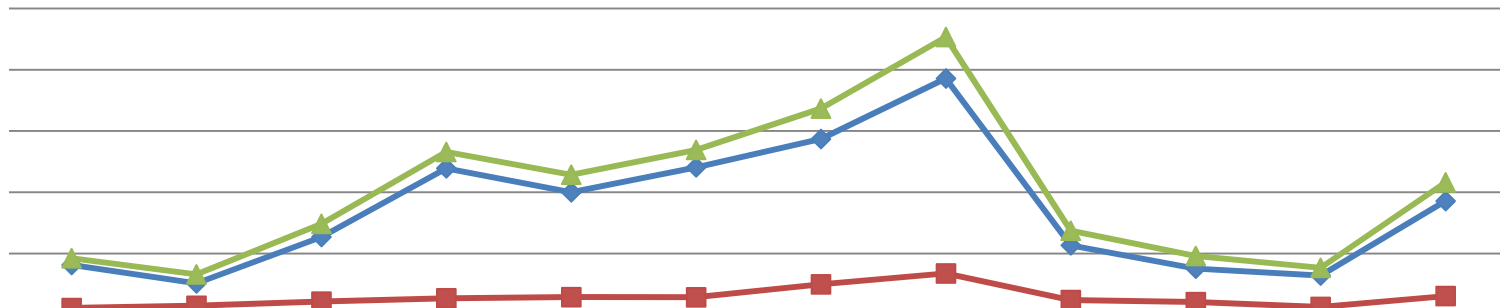
Devon - Estimated seasonality of staying visits

Seasonality - trips



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK trips (000's)	295.9	169.2	385.4	617.9	563.3	465.1	690.0	865.7	349.3	247.8	313.3	311.1
OS trips (000's)	19.0	27.3	27.0	27.8	39.0	52.2	67.1	58.7	52.7	36.6	20.2	30.2
Total trips (000's)	314.9	196.5	412.4	645.7	602.3	517.3	757.1	924.4	402.1	284.4	333.6	341.3

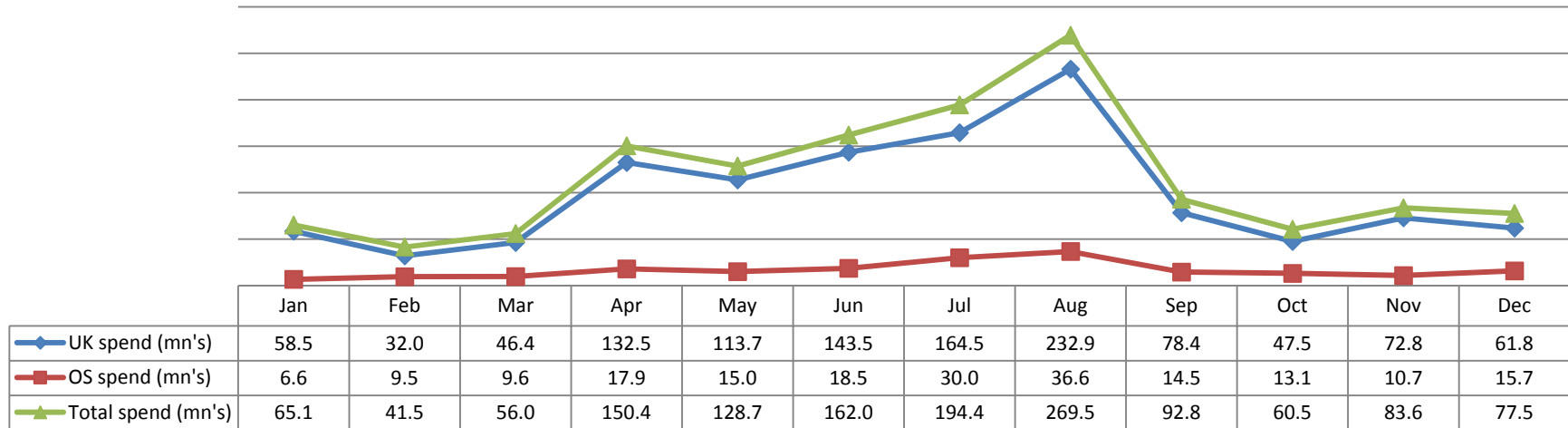
Seasonality - nights



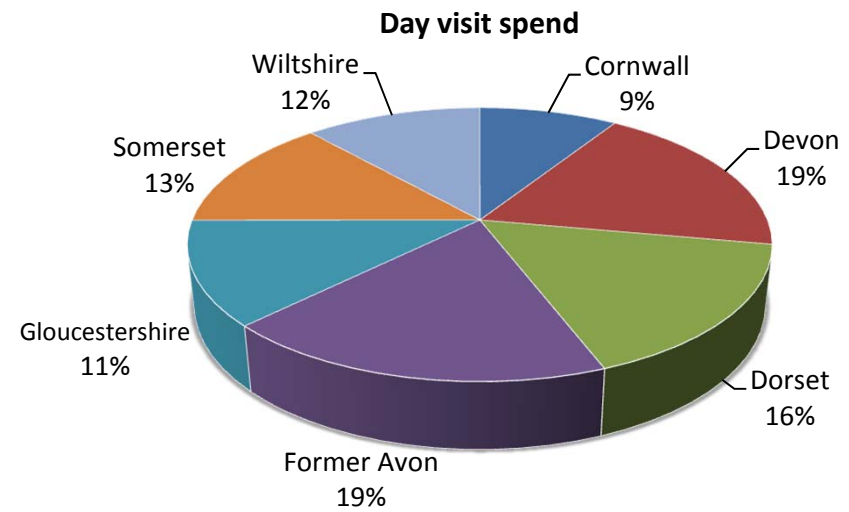
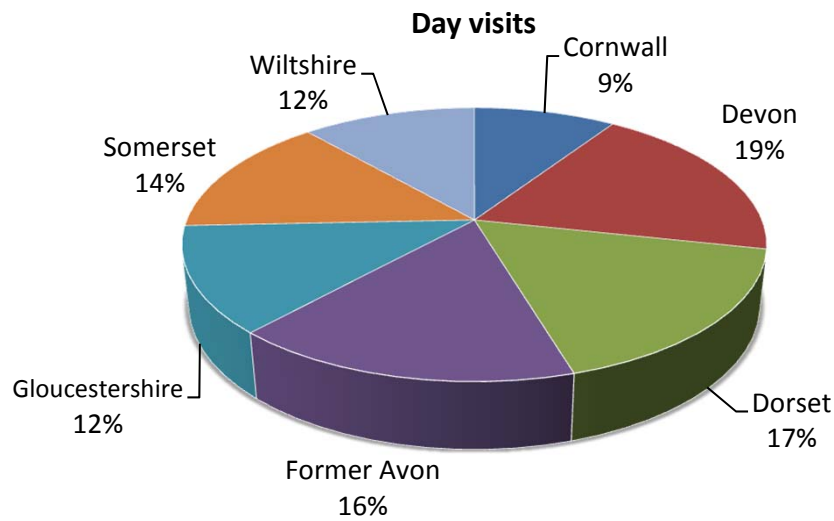
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK nights (000's)	813.2	512.2	1268.3	2389.5	1998.6	2405.8	2869.0	3857.3	1132.9	752.6	639.4	1855.1
OS nights (000's)	109.7	145.9	214.8	268.3	287.2	284.5	497.1	674.9	239.2	206.9	126.4	305.1
Total nights (000's)	922.9	658.1	1483.1	2657.8	2285.9	2690.3	3366.2	4532.2	1372.1	959.4	765.8	2160.3

Devon - Estimated seasonality of staying visits

Seasonality - spend



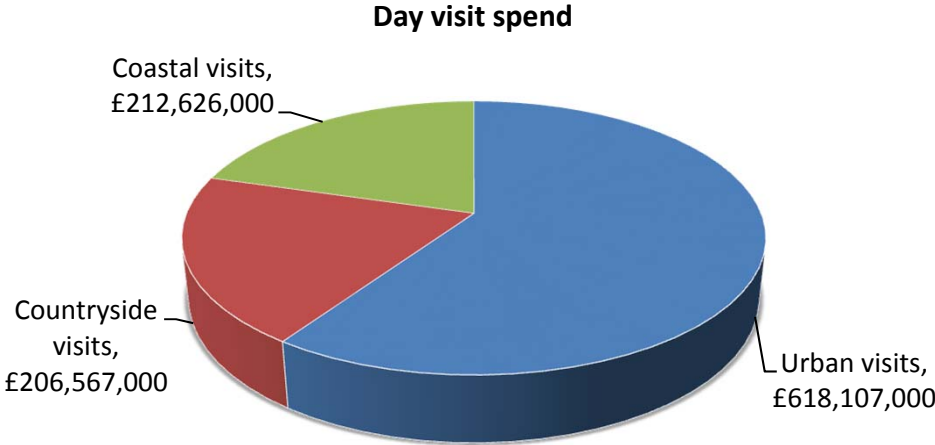
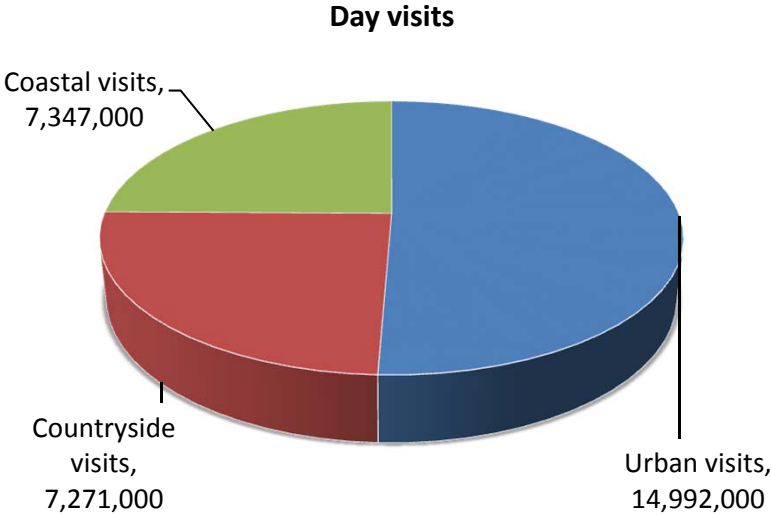
Devon - Day visits in the regional context



Area	Day visits (millions)	Day visit spend (millions)
Cornwall	14.5	£501.9
Devon	29.6	£1,037.3
Dorset	26.4	£900.5
Former Avon	25.5	£1,024.0
Gloucestershire	19.5	£680.8
Somerset	22.1	£741.4
Wiltshire	17.7	£641.9

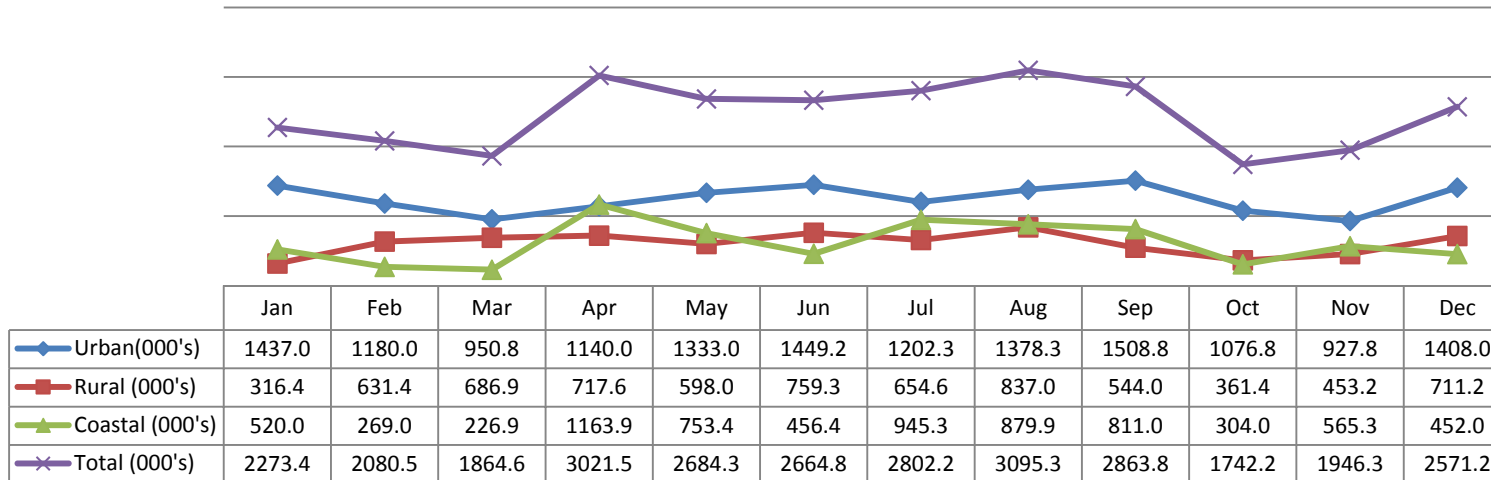
Devon - Day visits by location

Total day visits	Total day visit spend
29,610,000	£1,037,300,000

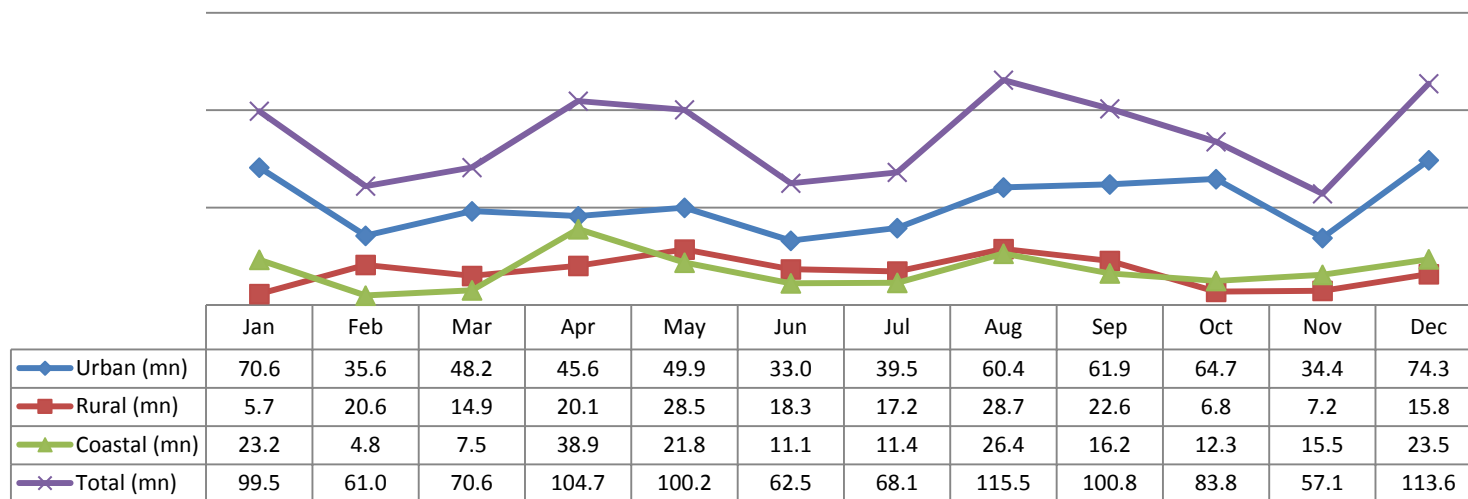


Devon - Estimated seasonality of day visits

Seasonality - day visits (000's)

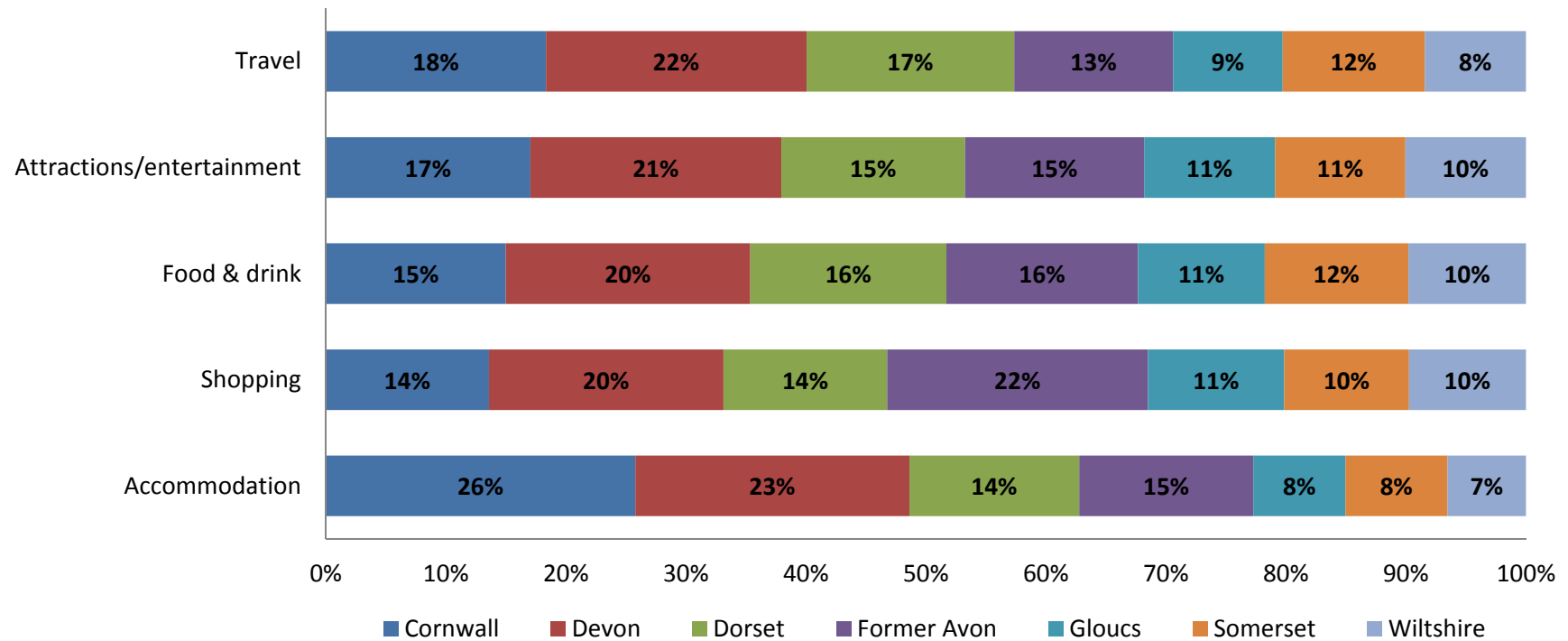


Seasonality - day visit spend (millions)



Devon – Direct visitor expenditure by category in the regional context

Devon	Accommodation	Shopping	Food & drink	Attractions/entertainment	Travel	TOTAL
Spend	£2,162,277,000	£2,777,304,000	£3,649,651,000	£1,293,446,000	£1,696,783,000	£11,579,460,000
%	19%	24%	32%	11%	15%	100%



Devon – Direct visitor expenditure by category



Accommodation

- UK staying visitors £438,729,000
- Overseas staying visitors £55,254,000



Shopping

- UK staying visitors £151,901,000
- Overseas staying visitors £58,094,000
- Day visitors £332,512,000



Food & drink

- UK staying visitors £263,974,000
- Overseas staying visitors £43,986,000
- Day visitors £435,925,000



Attractions/entertainment

- UK staying visitors £130,069,000
- Overseas staying visitors £21,069,000
- Day visitors £119,225,000



Travel

- UK staying visitors £199,682,000
- Overseas staying visitors £19,233,000
- Day visitors £149,638,000

Devon – Other visitor related expenditure by category



Second Homes
£8,175,000



Boats
£7,374,000



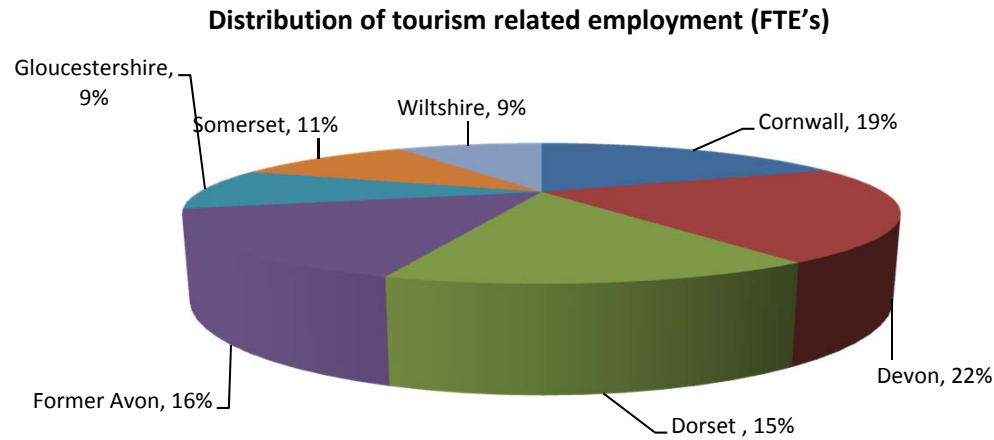
Visiting friends and relatives (non-visitor spend)
£62,429,000

Devon – Business turnover

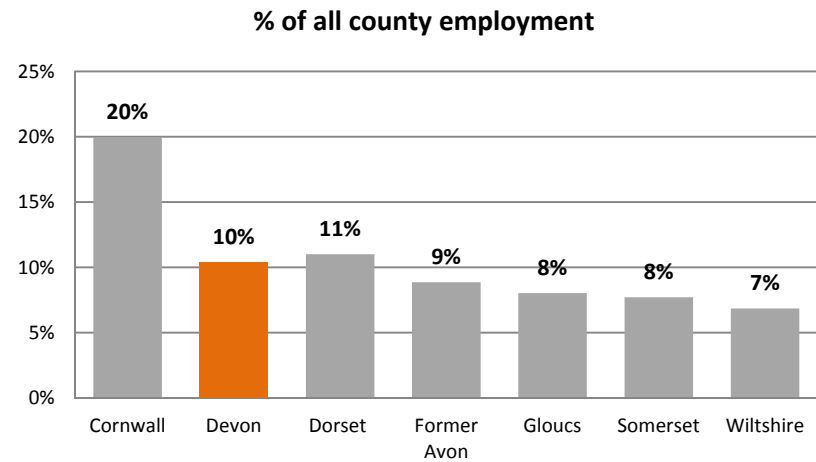
Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£500,142,000	£8,718,000	£508,860,000
Retailing	£207,894,000	£329,187,000	£537,081,000
Catering	£298,721,000	£422,848,000	£721,569,000
Attractions/entertainment	£156,318,000	£126,911,000	£283,229,000
Transport	£131,349,000	£89,784,000	£221,133,000
Arising from non trip spend	£77,978,000	£0	£77,978,000
Total Direct	£1,372,402,000	£977,448,000	£2,349,850,000

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£1,372,402,000	£977,448,000	£2,349,850,000
Supplier and income induced	£748,814,000	£421,048,000	£1,169,862,000
Total	£2,121,216,000	£1,398,496,000	£3,519,712,000

Devon – Tourism related employment in the regional context



Area	Number of FTE's
Cornwall	39,511
Devon	45,263
Dorset	30,770
Former Avon	33,149
Gloucestershire	19,849
Somerset	22,080
Wiltshire	18,469



Devon – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)



Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	6,623	115	6,738
Retailing	1,617	2,560	4,177
Catering	3,742	5,298	9,040
Attractions/entertainment	2,468	2,004	4,473
Transport	852	583	1,435
Arising from non trip spend	1,212	0	1,212
Total Direct	16,515	10,561	27,076