

The Economic Impact of Devon's Visitor Economy 2012

Torbay



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



January 2014



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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 2012.

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.

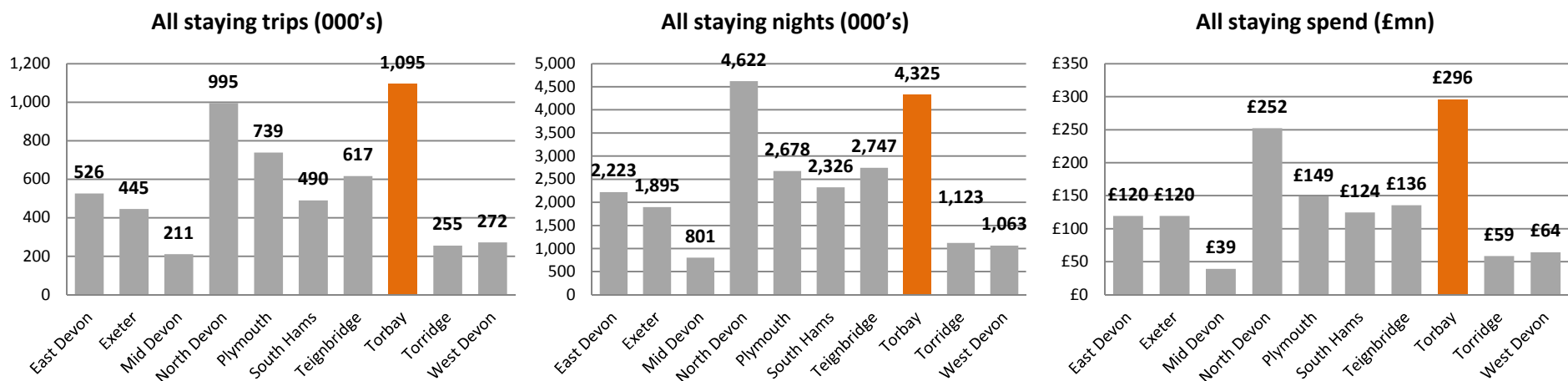
For an overview of 2012, including key facts about the economy, weather and key events please see Appendix 2 of this report.

Value of Tourism 2012

Torbay

Key Facts	
1,094,800	Staying visitor trips
4,324,900	Staying visitor nights
£295,932,000	Staying visitor spend
3,761,000	Day visits
£122,463,000	Day visitor spend
£418,395,000	Direct visitor spend
£13,151,000	Other related spend
£431,546,000	TOTAL VISITOR RELATED SPEND
12,075	Estimated actual employment
8,821	FTE employment
21%	Proportion of all employment

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)
East Devon	487	39	1,865	358	£100	£20
Exeter	400	45	1,242	653	£81	£39
Mid Devon	196	15	672	129	£33	£6
North Devon	962	33	4,335	287	£239	£13
Plymouth	677	62	2,034	644	£115	£34
South Hams	461	29	2,045	281	£109	£15
Teignbridge	586	31	2,490	257	£123	£12
Torbay	997	98	3,679	646	£251	£45
Torridge	240	15	986	137	£52	£7
West Devon	253	19	901	162	£55	£9

Torbay - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	446,000	1,206,000	£126,450,000
Self catering	92,000	542,000	£38,399,000
Touring caravans /tents	29,000	163,000	£5,349,000
Static vans/holiday centres	186,000	986,000	£51,748,000
Group/campus	2,000	6,000	£649,000
Paying guest in private homes	0	0	£0
Second homes	9,000	69,000	£1,543,000
Boat moorings	13,000	18,000	£3,022,000
Other	11,000	32,000	£1,081,000
Staying with friends and relatives	208,000	658,000	£22,458,000
Total	997,000	3,679,000	£250,699,000

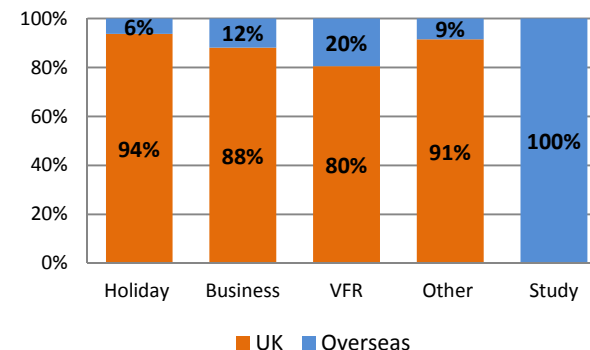
Overseas tourists	Trips	Nights	Spend
Serviced	64,400	240,800	£24,186,000
Self catering	3,900	39,800	£2,395,000
Touring caravans /tents	1,100	10,100	£352,000
Static vans/holiday centres	1,200	10,000	£395,000
Group/campus	400	10,700	£677,000
Paying guest in private homes	7,700	148,500	£9,737,000
Second homes	400	8,200	£709,000
Boat moorings	0	0	£0
Other	700	2,500	£81,000
Staying with friends and relatives	17,900	175,300	£6,700,000
Total	97,800	645,900	£45,233,000

Torbay - Staying visits by purpose

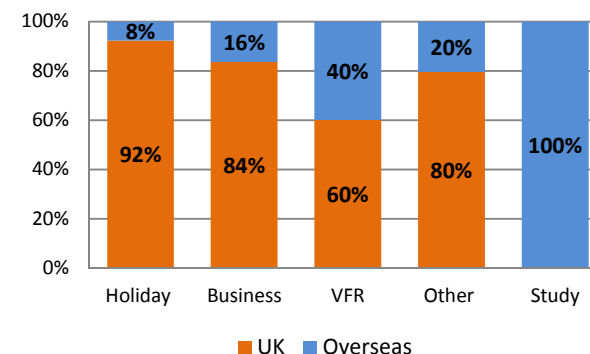
Domestic tourists	Trips	Nights	Spend
Holiday	787,000	3,165,000	£177,577,000
Business	113,000	260,000	£47,797,000
Visits to friends and relatives	81,000	188,000	£18,442,000
Other	17,000	67,000	£6,883,000
Study	0	0	£0
Total	997,000	3,679,000	£250,699,000

Overseas tourists	Trips	Nights	Spend
Holiday	53,500	262,900	£19,944,000
Business	15,300	51,200	£5,613,000
Visits to friends and relatives	19,700	124,900	£6,003,000
Other	1,600	17,200	£1,370,000
Study	7,600	189,700	£12,304,000
Total	97,800	645,900	£45,233,000

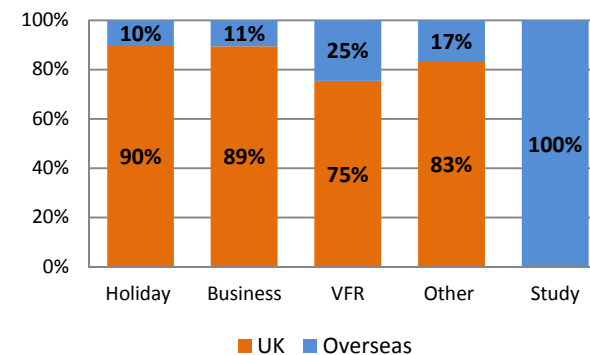
Trips



Nights

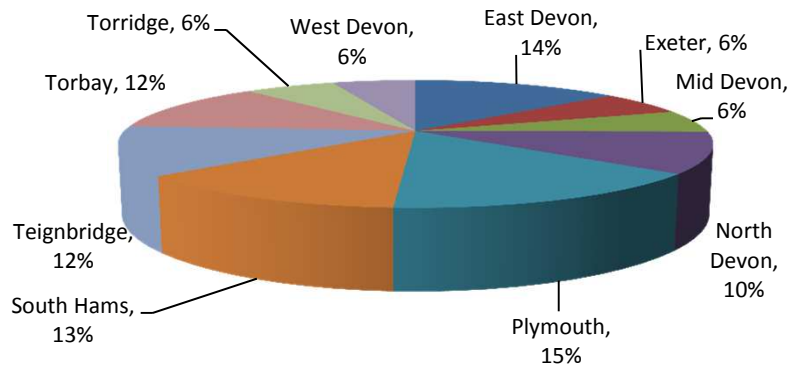


Spend

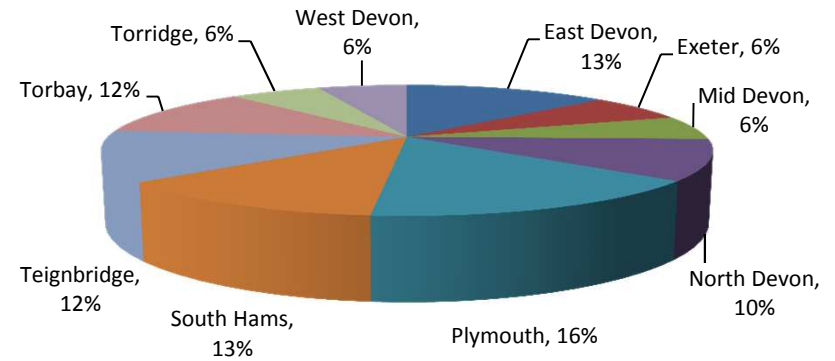


Torbay - Day visits in the county context

All day visits



All day visit spend

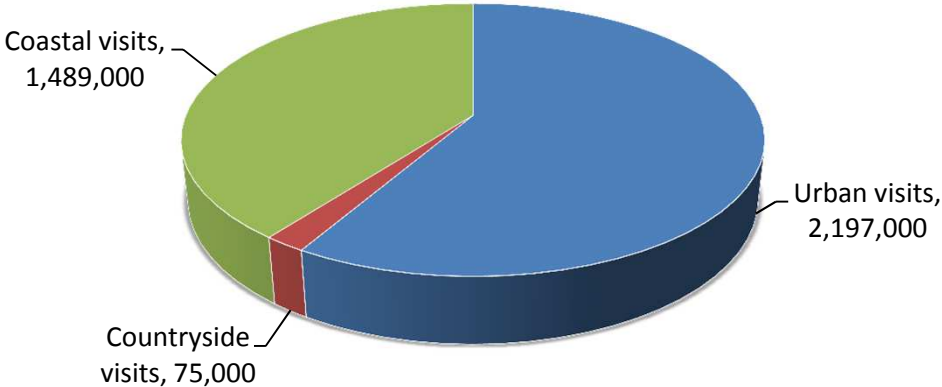


Area	Day visits	Day visit spend
East Devon	4.2	£136.9
Exeter	1.8	£66.9
Mid Devon	1.7	£61.1
North Devon	3.2	£104.1
Plymouth	4.7	£165.5
South Hams	4.0	£130.5
Teignbridge	3.8	£128.6
Torbay	3.8	£122.5
Torridge	1.8	£61.0
West Devon	1.7	£59.9

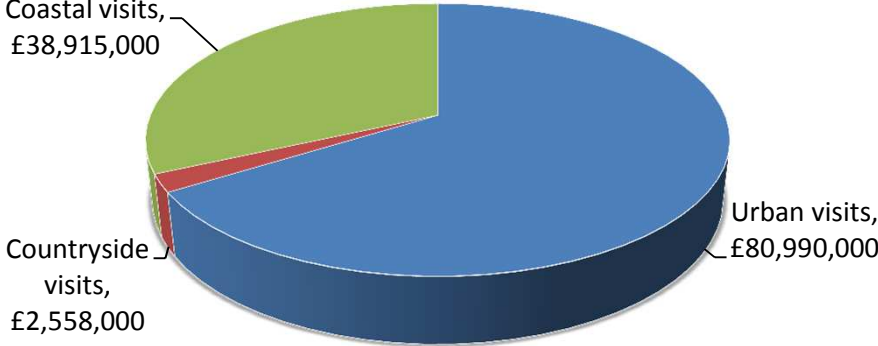
Torbay - Day visits by location

Total day visits	Total day visit spend
3,761,000	£122,463,000

Day visits



Day visit spend



Torbay – Direct visitor expenditure by category



Accommodation

- UK staying visitors £93,375,000
- Overseas staying visitors £13,941,000



Shopping

- UK staying visitors £30,089,000
- Overseas staying visitors £12,866,000
- Day visitors £40,024,000



Food & drink

- UK staying visitors £56,677,000
- Overseas staying visitors £9,019,000
- Day visitors £51,466,000



Attractions/entertainment

- UK staying visitors £25,306,000
- Overseas staying visitors £5,476,000
- Day visitors £12,384,000



Travel

- UK staying visitors £45,253,000
- Overseas staying visitors £3,932,000
- Day visitors £18,589,000

Torbay – Other visitor related expenditure by category



Second Homes

£905,000



Boats

£2,190,000



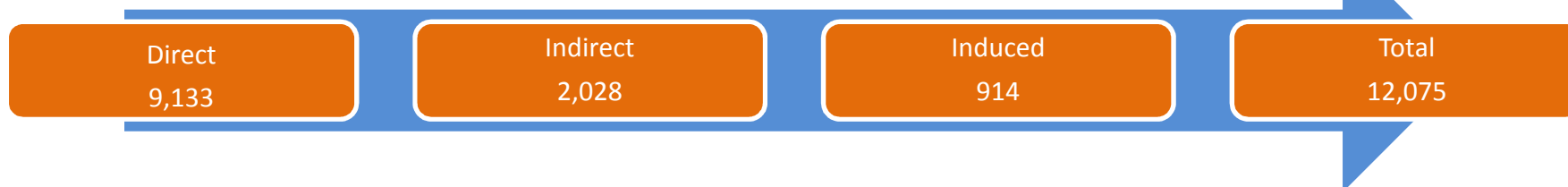
Visiting friends and relatives (non-visitor spend)

£10,056,000

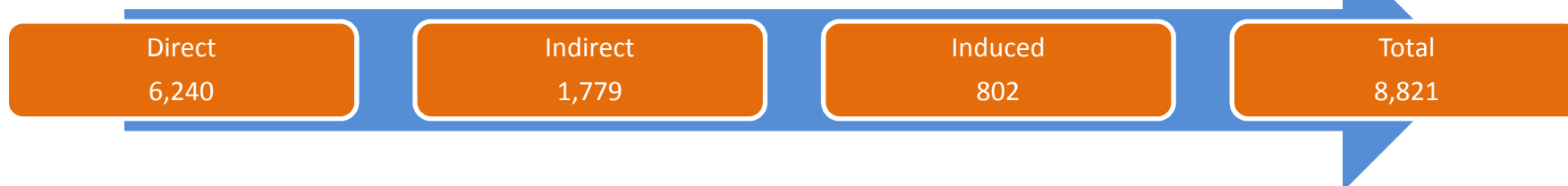
- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay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

Torbay – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)

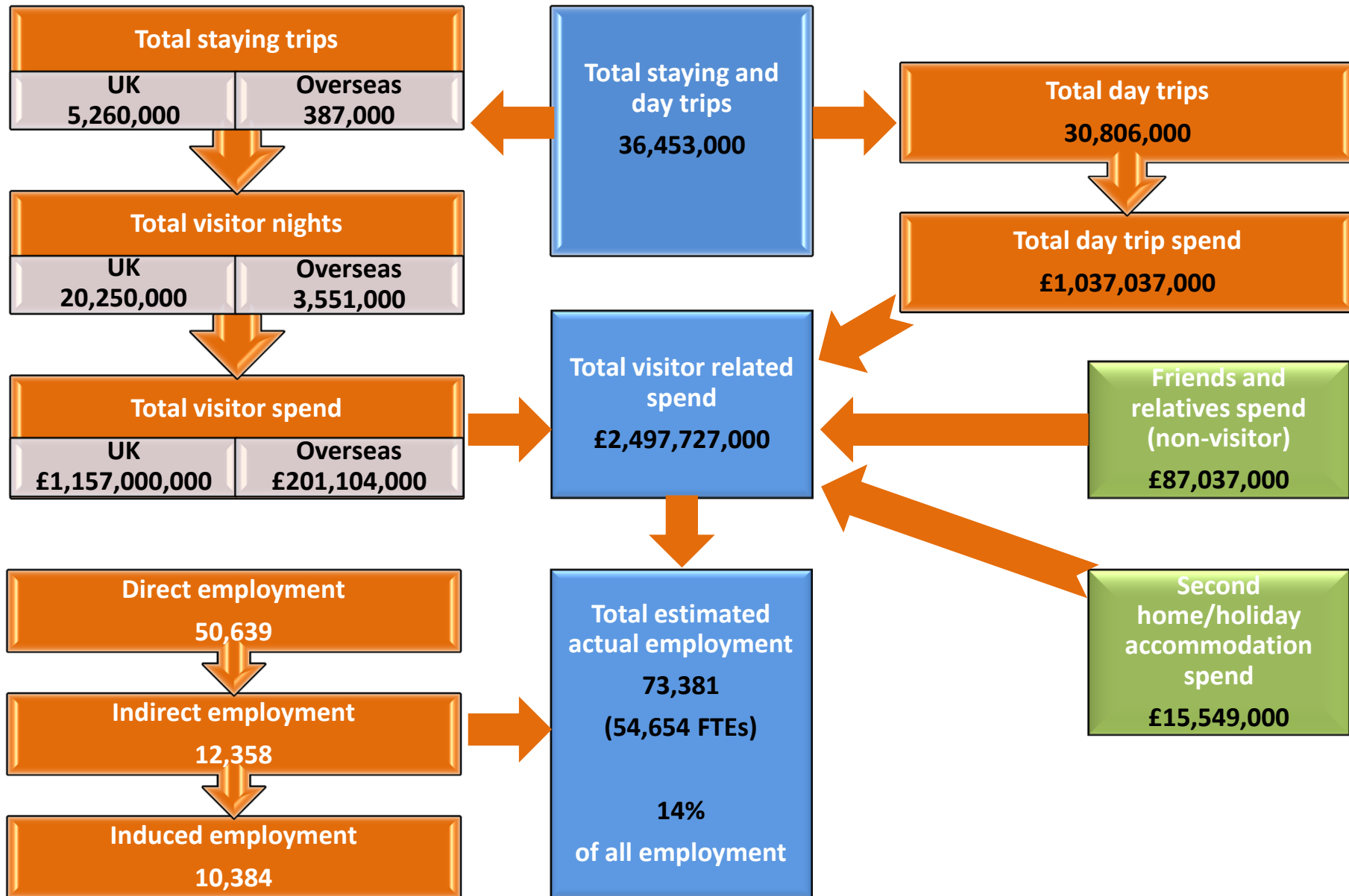


Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	1,936	18	1,954
Retailing	430	401	831
Catering	1,116	874	1,990
Attractions/entertainment	668	279	947
Transport	224	85	308
Arising from non trip spend	209	0	209
Total Direct	4,583	1,657	6,240

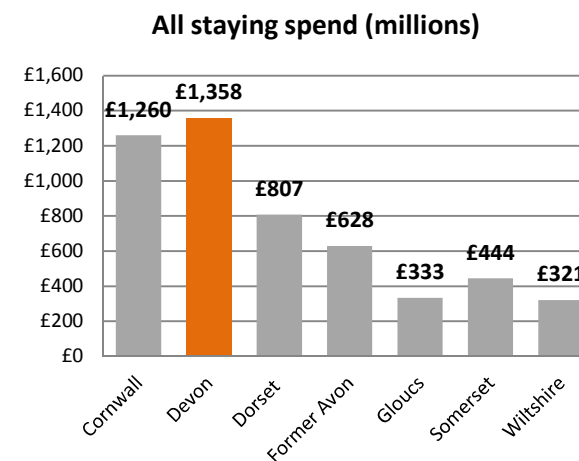
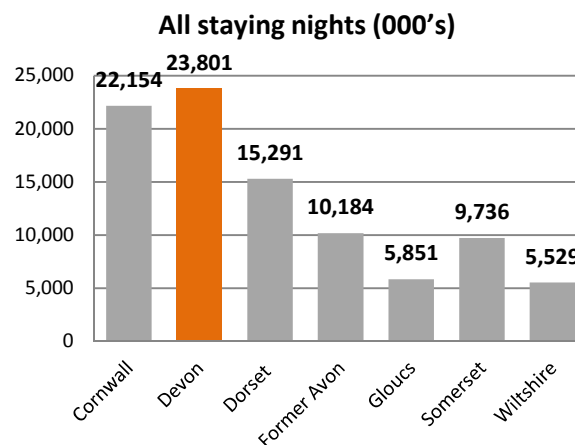
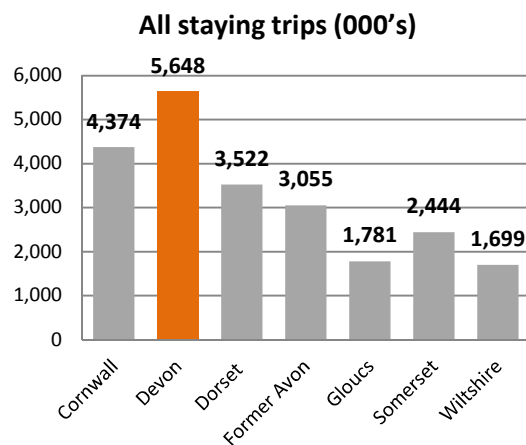
Devon 2012



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	4,070	304	20,100	2,054	£1,131	£129
Devon	5,260	388	20,250	3,551	£1,157	£201
Dorset	3,149	373	11,859	3,432	£607	£200
Former Avon	2,436	619	6,584	3,600	£431	£197
Gloucestershire	1,560	221	4,350	1,501	£240	£93
Somerset	2,260	184	8,355	1,381	£367	£77
Wiltshire	1,460	239	3,930	1,599	£248	£73

Devon - Staying visits by accommodation type

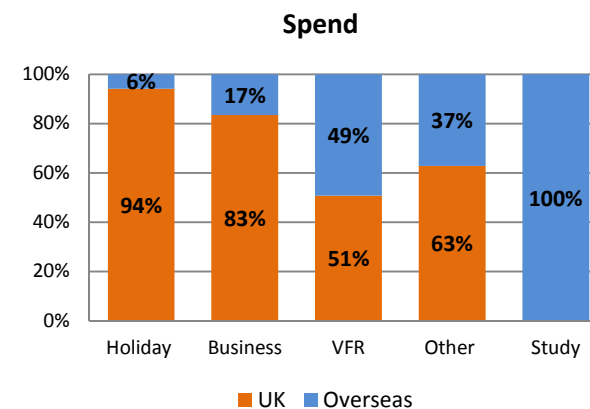
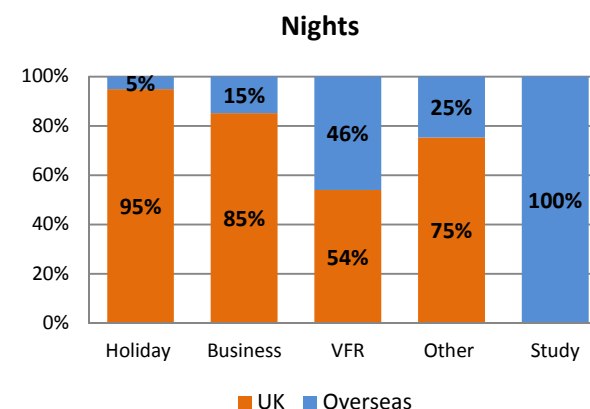
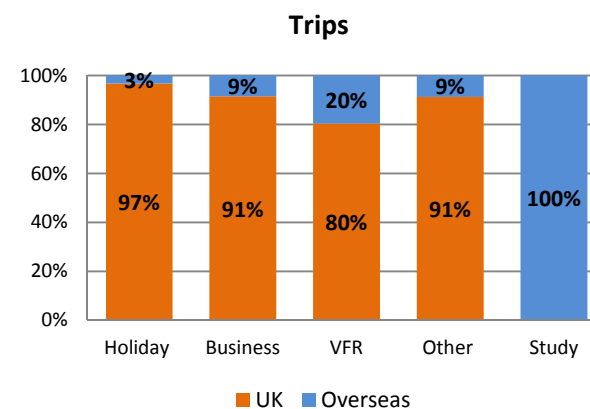
Domestic tourists	Trips	Nights	Spend
Serviced	1,401,000	3,788,000	£397,128,000
Self catering	478,000	2,807,000	£198,952,000
Touring caravans /tents	466,000	2,604,000	£85,673,000
Static vans/holiday centres	767,000	4,063,000	£213,143,000
Group/campus	126,000	340,000	£34,240,000
Paying guest in private homes	0	0	£0
Second homes	80,000	621,000	£13,948,000
Boat moorings	43,000	60,000	£10,175,000
Other	97,000	275,000	£9,356,000
Staying with friends and relatives	1,801,000	5,692,000	£194,385,000
Total	5,260,000	20,250,000	£1,157,000,000

Overseas tourists	Trips	Nights	Spend
Serviced	134,000	501,000	£50,318,000
Self catering	20,000	206,000	£12,407,000
Touring caravans /tents	18,000	162,000	£5,642,000
Static vans/holiday centres	5,000	41,000	£1,629,000
Group/campus	21,000	567,000	£35,711,000
Paying guest in private homes	24,000	462,000	£30,294,000
Second homes	4,000	74,000	£6,412,000
Boat moorings	0	0	£0
Other	6,000	22,000	£699,000
Staying with friends and relatives	155,000	1,517,000	£57,992,000
Total	387,000	3,551,000	£201,104,000

Devon - Staying visits by purpose

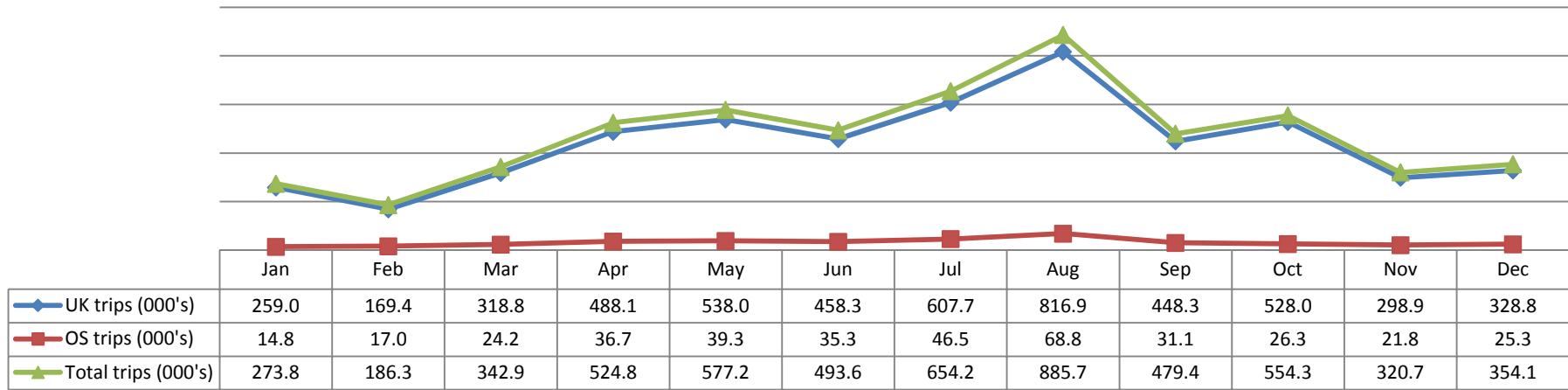
Domestic tourists	Trips	Nights	Spend
Holiday	3,964,000	16,827,000	£975,648,000
Business	450,000	1,097,000	£93,422,000
Visits to friends and relatives	700,000	1,713,000	£64,032,000
Other	146,000	612,000	£23,898,000
Study	0	0	£0
Total	5,260,000	20,250,000	£1,157,000,000

Overseas tourists	Trips	Nights	Spend
Holiday	136,000	904,000	£60,656,000
Business	42,000	191,000	£18,494,000
Visits to friends and relatives	171,000	1,460,000	£62,062,000
Other	14,000	201,000	£14,166,000
Study	24,000	797,000	£45,725,000
Total	387,000	3,551,000	£201,104,000

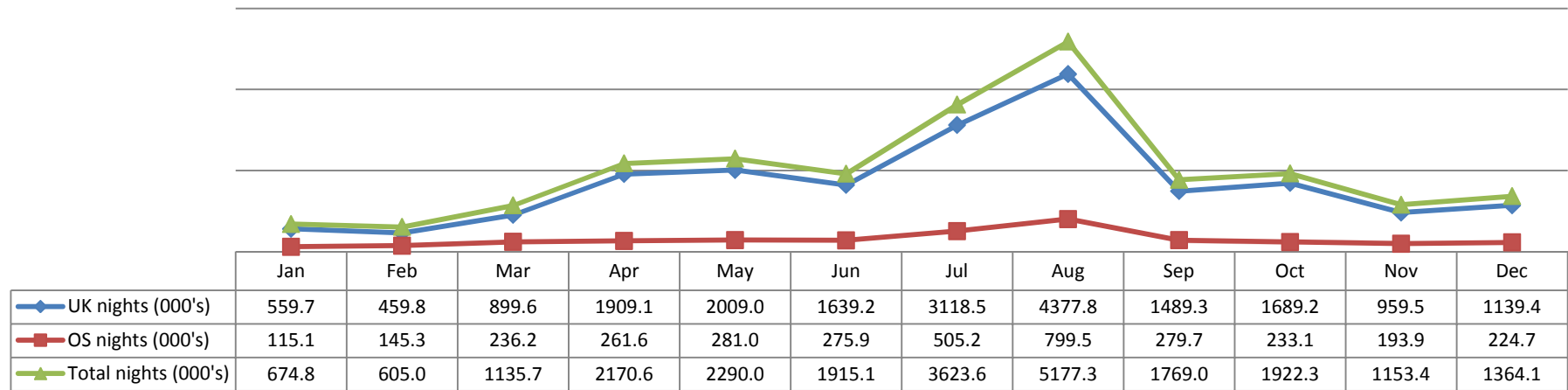


Devon - Estimated seasonality of staying visits

Seasonality - trips

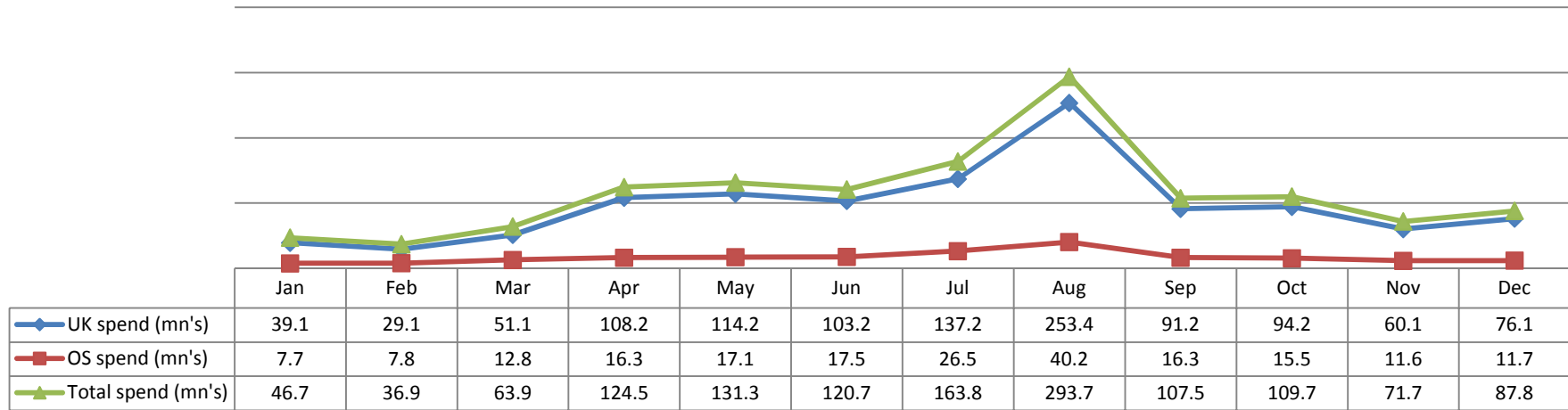


Seasonality - nights

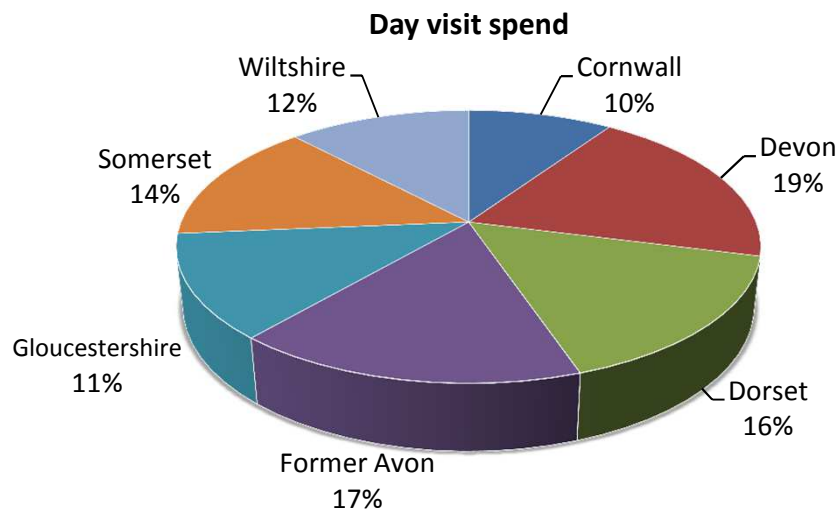
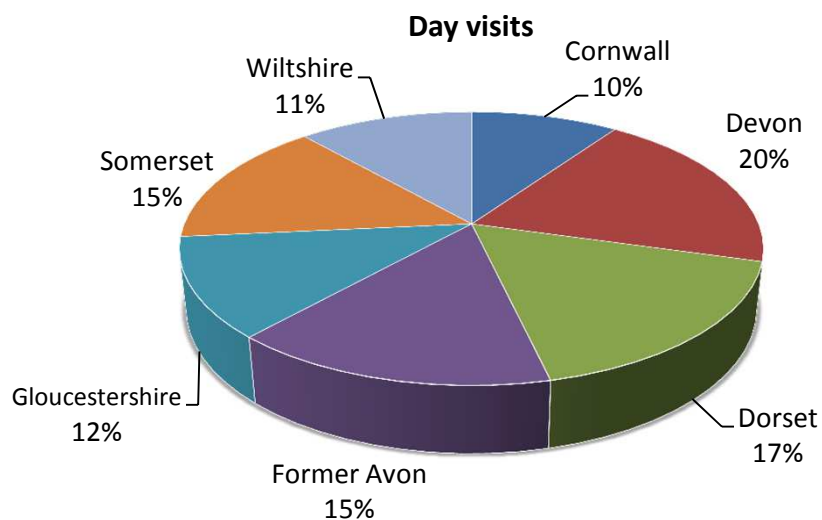


Devon - Estimated seasonality of staying visits

Seasonality - spend



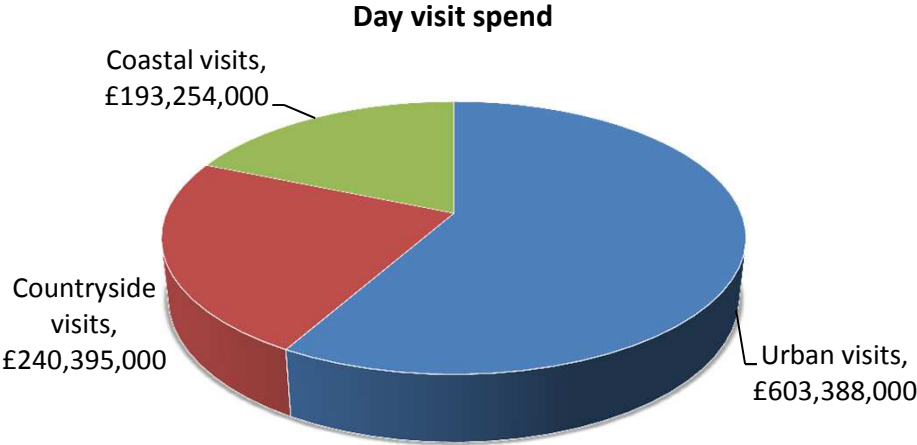
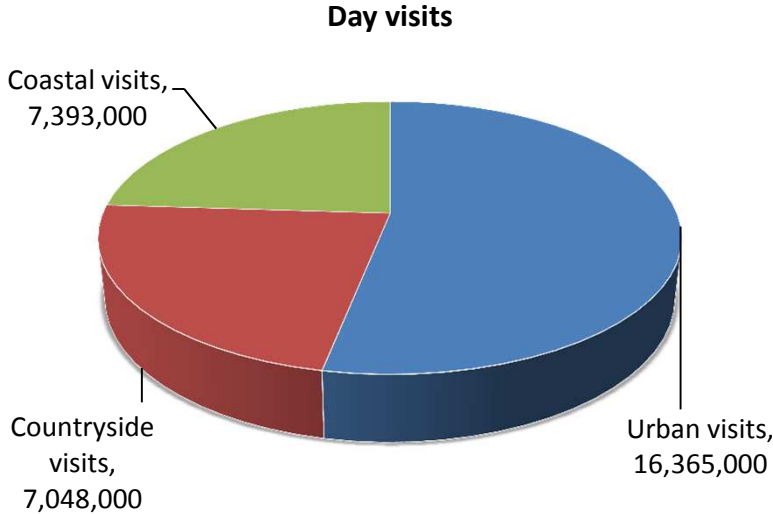
Devon - Day visits in the regional context



Area	Day visits (millions)	Day visit spend (millions)
Cornwall	15.2	£506.2
Devon	30.8	£1,037.0
Dorset	26.6	£842.9
Former Avon	24.0	£880.2
Gloucestershire	18.5	£657.6
Somerset	23.5	£765.3
Wiltshire	18.0	£638.4

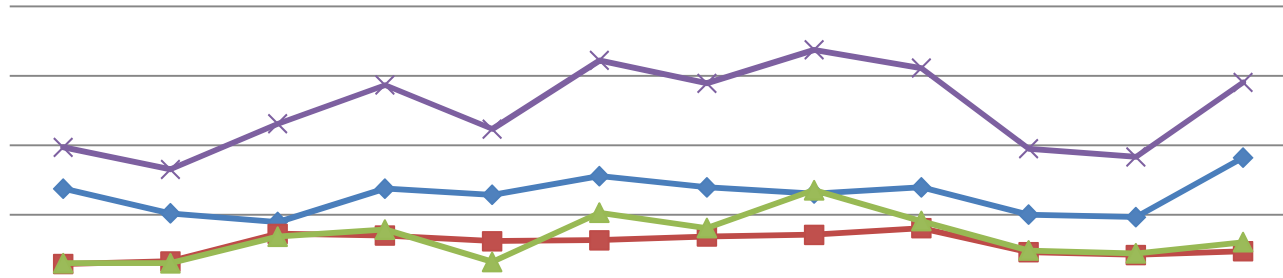
Devon - Day visits by location

Total day visits	Total day visit spend
30,806,000	£1,037,037,000



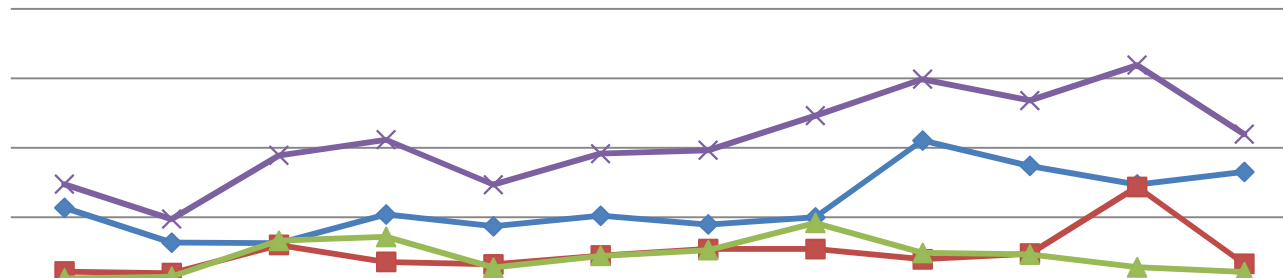
Devon - Estimated seasonality of day visits

Seasonality - day visits (000's)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban(000's)	688.5	509.7	447.1	688.5	643.8	777.9	697.5	652.8	697.5	500.7	482.9	912.1
Rural (000's)	145.5	165.4	363.8	350.6	310.9	317.5	344.0	357.2	403.5	231.5	211.7	238.2
Coastal (000's)	151.4	151.4	343.2	393.7	161.5	514.9	403.8	676.4	454.3	242.3	222.1	302.9
Total (000's)	985.5	826.5	1154.2	1432.9	1116.3	1610.4	1445.3	1686.4	1555.3	974.6	916.7	1453.1

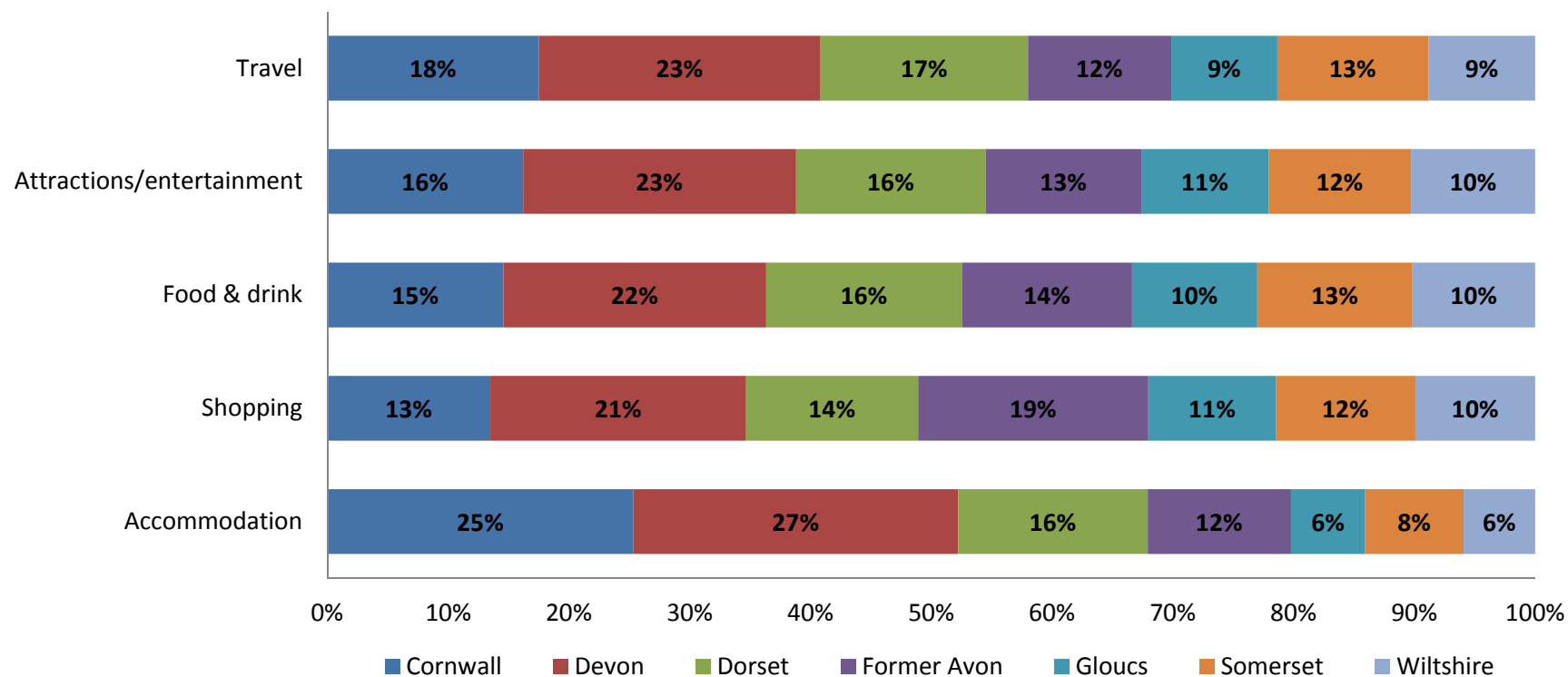
Seasonality - day visit spend (millions)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban (mn)	22.8	12.7	12.6	20.8	17.4	20.4	17.9	20.0	42.1	34.8	29.4	33.1
Rural (mn)	4.4	3.9	12.0	7.1	6.4	9.0	10.9	10.9	7.9	9.5	28.7	6.6
Coastal (mn)	2.4	2.9	13.2	14.4	5.5	8.9	10.5	18.4	9.8	9.3	5.6	4.2
Total (mn)	29.5	19.5	37.8	42.3	29.4	38.3	39.3	49.2	59.7	53.6	63.8	43.9

Devon – Direct visitor expenditure by category in the regional context

South West	Accommodation	Shopping	Food & drink	Attractions/entertainment	Travel	TOTAL
Spend	£1,858,768,000	£2,495,180,000	£3,370,065,000	£1,199,289,000	£1,555,565,000	£10,478,868,000
%	18%	24%	32%	11%	15%	100%



Devon – Direct visitor expenditure by category



Accommodation

- UK staying visitors £431,708,000
- Overseas staying visitors £55,203,000



Shopping

- UK staying visitors £146,115,000
- Overseas staying visitors £59,873,000
- Day visitors £330,516,000



Food & drink

- UK staying visitors £257,723,000
- Overseas staying visitors £41,544,000
- Day visitors £436,127,000



Attractions/entertainment

- UK staying visitors £124,623,000
- Overseas staying visitors £26,273,000
- Day visitors £121,842,000



Travel

- UK staying visitors £196,831,000
- Overseas staying visitors £18,207,000
- Day visitors £148,551,000

Devon – Other visitor related expenditure by category



Second Homes

£8,175,000



Boats

£7,374,000



Visiting friends and relatives (non-visitor spend)

£87,037,000

- 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.

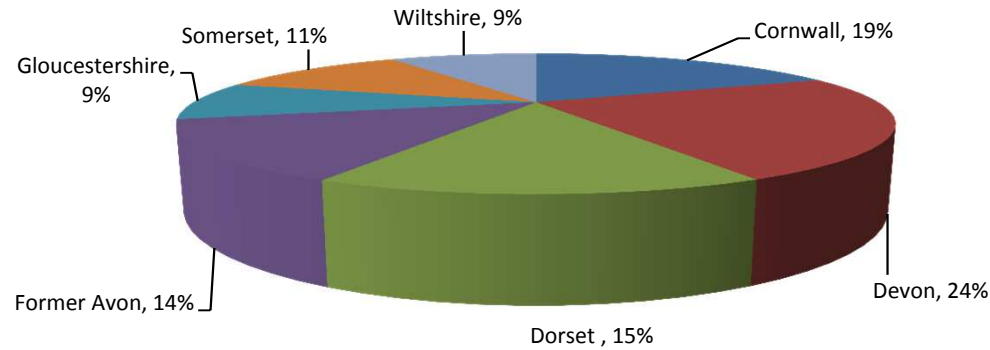
Devon – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£492,896,000	£8,723,000	£501,619,000
Retailing	£203,929,000	£327,211,000	£531,140,000
Catering	£290,292,000	£423,043,000	£713,335,000
Attractions/entertainment	£155,949,000	£129,508,000	£285,457,000
Transport	£129,023,000	£89,131,000	£218,154,000
Arising from non trip spend	£102,586,000	£0	£102,586,000
Total Direct	£1,374,675,000	£977,616,000	£2,352,291,000

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£1,374,675,000	£977,616,000	£2,352,291,000
Supplier and income induced	£798,186,000	£458,615,000	£1,256,801,000
Total	£2,172,861,000	£1,436,231,000	£3,609,092,000

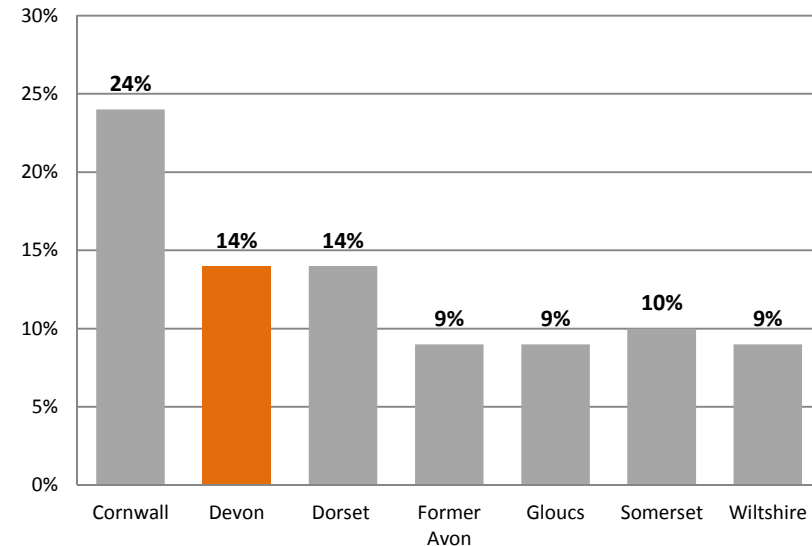
Devon – Tourism related employment in the regional context

Distribution of tourism related employment (FTE's)



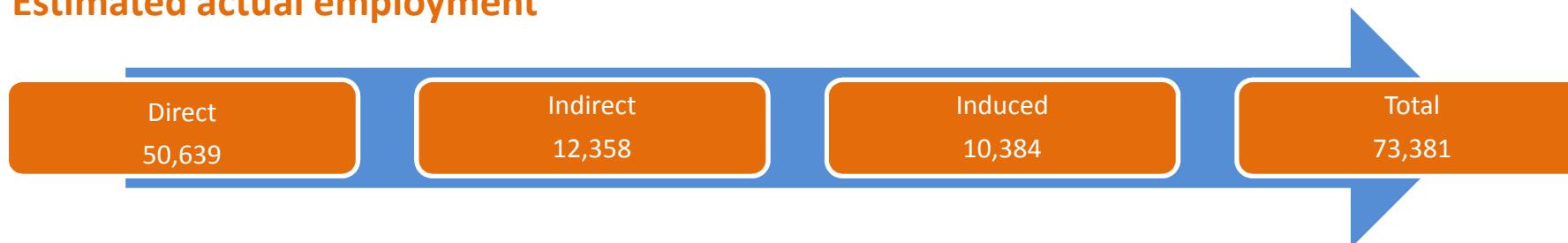
Area	Number of FTE's
Cornwall	43,212
Devon	54,410
Dorset	35,350
Former Avon	31,300
Gloucestershire	20,214
Somerset	26,167
Wiltshire	20,565

% of all county employment



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	8,435	149	8,584
Retailing	1,982	3,180	5,162
Catering	4,881	7,113	11,993
Attractions/entertainment	3,141	2,608	5,749
Transport	939	649	1,588
Arising from non trip spend	1,628	0	1,628
Total Direct	21,006	13,699	34,704