

The Economic Impact of Devon's Visitor Economy 2013

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 2013.

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.

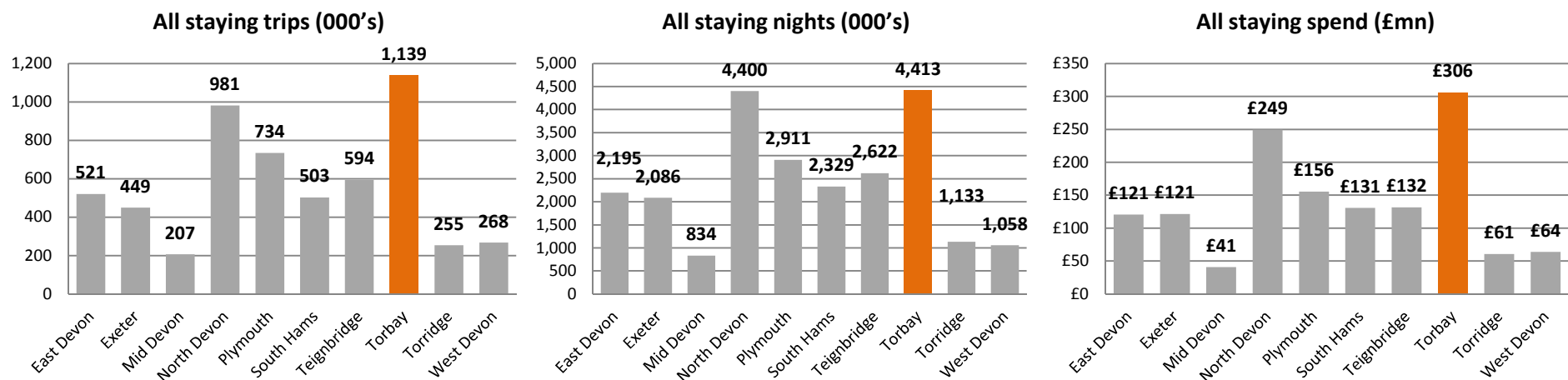
For an overview of 2013, including key facts about the economy, weather and key events please see Appendix 2 of this report.

Value of Tourism 2013

Torbay

Key Facts	
1,139,200	Staying visitor trips
4,413,200	Staying visitor nights
£306,026,000	Staying visitor spend
3,589,000	Day visits
£128,359,000	Day visitor spend
£434,385,000	Direct visitor spend
£10,376,000	Other related spend
£444,761,000	TOTAL VISITOR RELATED SPEND
12,657	Estimated actual employment
9,234	FTE employment
22%	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	470	51	1,779	416	£98	£23
Exeter	385	64	1,315	771	£73	£48
Mid Devon	186	21	670	164	£33	£8
North Devon	916	65	3,954	446	£223	£27
Plymouth	645	89	2,126	785	£111	£44
South Hams	462	41	1,961	368	£110	£21
Teignbridge	551	43	2,295	327	£115	£17
Torbay	1,027	112	3,685	728	£256	£50
Torrige	233	22	952	181	£51	£9
West Devon	240	28	853	205	£52	£13

Torbay - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	511,000	1,313,000	£138,352,000
Self catering	106,000	594,000	£42,712,000
Touring caravans /tents	37,000	171,000	£7,006,000
Static vans/holiday centres	156,000	822,000	£41,670,000
Group/campus	2,000	6,000	£231,000
Paying guest in private homes	0	0	£0
Second homes	10,000	39,000	£1,668,000
Boat moorings	6,000	27,000	£1,186,000
Other	8,000	15,000	£992,000
Staying with friends and relatives	192,000	697,000	£22,658,000
Total	1,027,000	3,685,000	£256,478,000

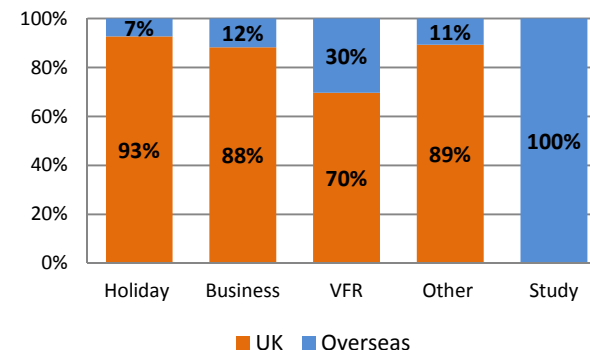
Overseas tourists	Trips	Nights	Spend
Serviced	72,200	291,800	£27,748,000
Self catering	5,300	70,200	£4,412,000
Touring caravans /tents	2,100	13,500	£631,000
Static vans/holiday centres	1,200	7,600	£389,000
Group/campus	600	12,900	£889,000
Paying guest in private homes	5,800	108,000	£6,385,000
Second homes	700	11,200	£567,000
Boat moorings	0	0	£0
Other	900	8,800	£400,000
Staying with friends and relatives	23,400	204,200	£8,127,000
Total	112,200	728,200	£49,548,000

Torbay - Staying visits by purpose

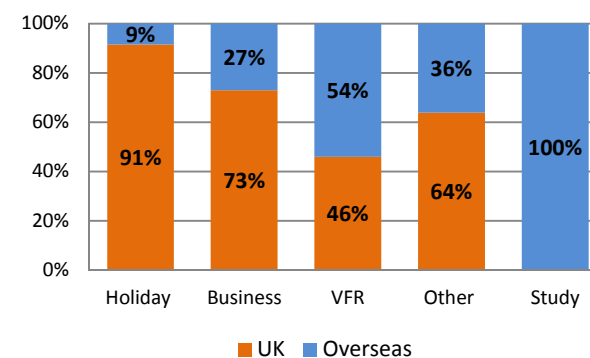
Domestic tourists	Trips	Nights	Spend
Holiday	862,000	3,278,000	£197,831,000
Business	100,000	228,000	£38,011,000
Visits to friends and relatives	51,000	131,000	£14,795,000
Other	14,000	48,000	£5,840,000
Study	0	0	£0
Total	1,027,000	3,685,000	£256,478,000

Overseas tourists	Trips	Nights	Spend
Holiday	69,200	304,900	£23,264,000
Business	13,400	84,800	£6,134,000
Visits to friends and relatives	22,200	153,700	£6,606,000
Other	1,700	27,100	£1,959,000
Study	5,700	157,700	£11,585,000
Total	112,200	728,200	£49,548,000

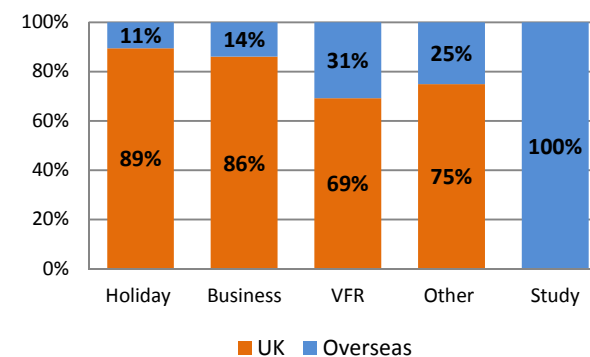
Trips



Nights

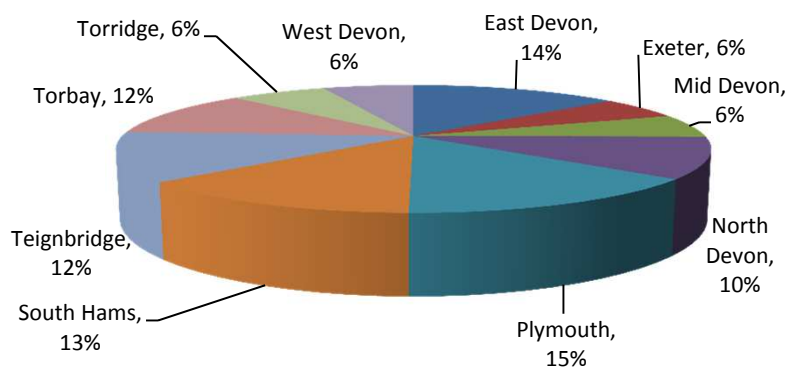


Spend

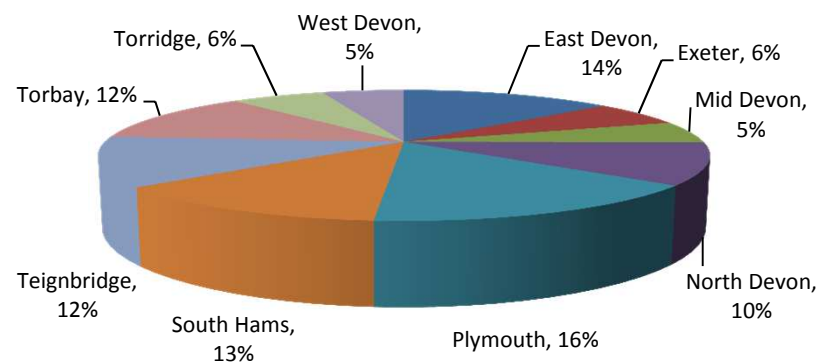


Torbay - Day visits in the county context

All day visits



All day visit spend

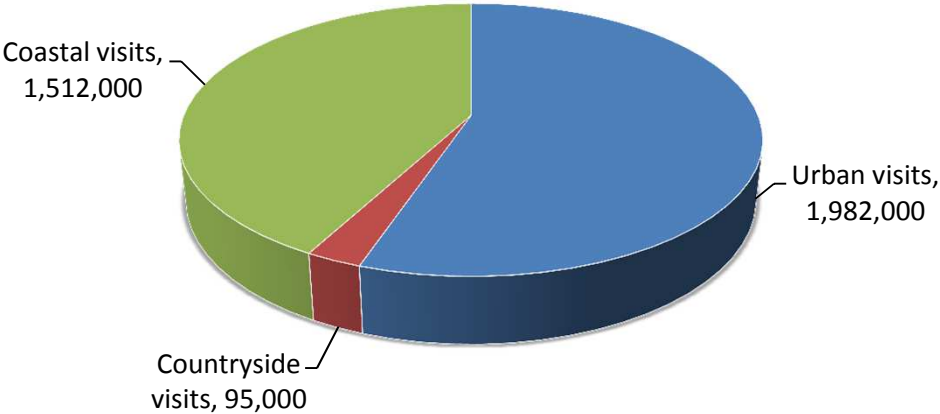


Area	Day visits	Day visit spend
East Devon	4.3	£142.5
Exeter	1.7	£63.0
Mid Devon	1.8	£55.7
North Devon	3.2	£108.2
Plymouth	4.5	£164.4
South Hams	4.2	£133.6
Teignbridge	3.9	£126.7
Torbay	3.6	£128.4
Torrige	2.0	£63.0
West Devon	1.9	£55.6

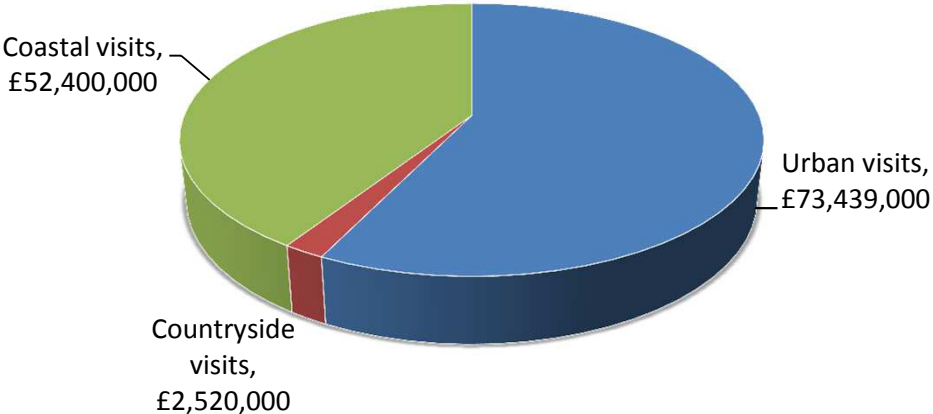
Torbay - Day visits by location

Total day visits	Total day visit spend
3,589,000	£128,359,000

Day visits



Day visit spend



Torbay – Direct visitor expenditure by category



Accommodation

- UK staying visitors £96,153,000
- Overseas staying visitors £15,370,000



Shopping

- UK staying visitors £31,355,000
- Overseas staying visitors £14,020,000
- Day visitors £38,051,000



Food & drink

- UK staying visitors £57,461,000
- Overseas staying visitors £10,008,000
- Day visitors £55,562,000



Attractions/entertainment

- UK staying visitors £26,495,000
- Overseas staying visitors £5,784,000
- Day visitors £13,082,000



Travel

- UK staying visitors £45,013,000
- Overseas staying visitors £4,365,000
- Day visitors £21,574,000

Torbay – Other visitor related expenditure by category



Second Homes

£905,000



Boats

£2,190,000



Visiting friends and relatives (non-visitor spend)

£7,281,000

- 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)

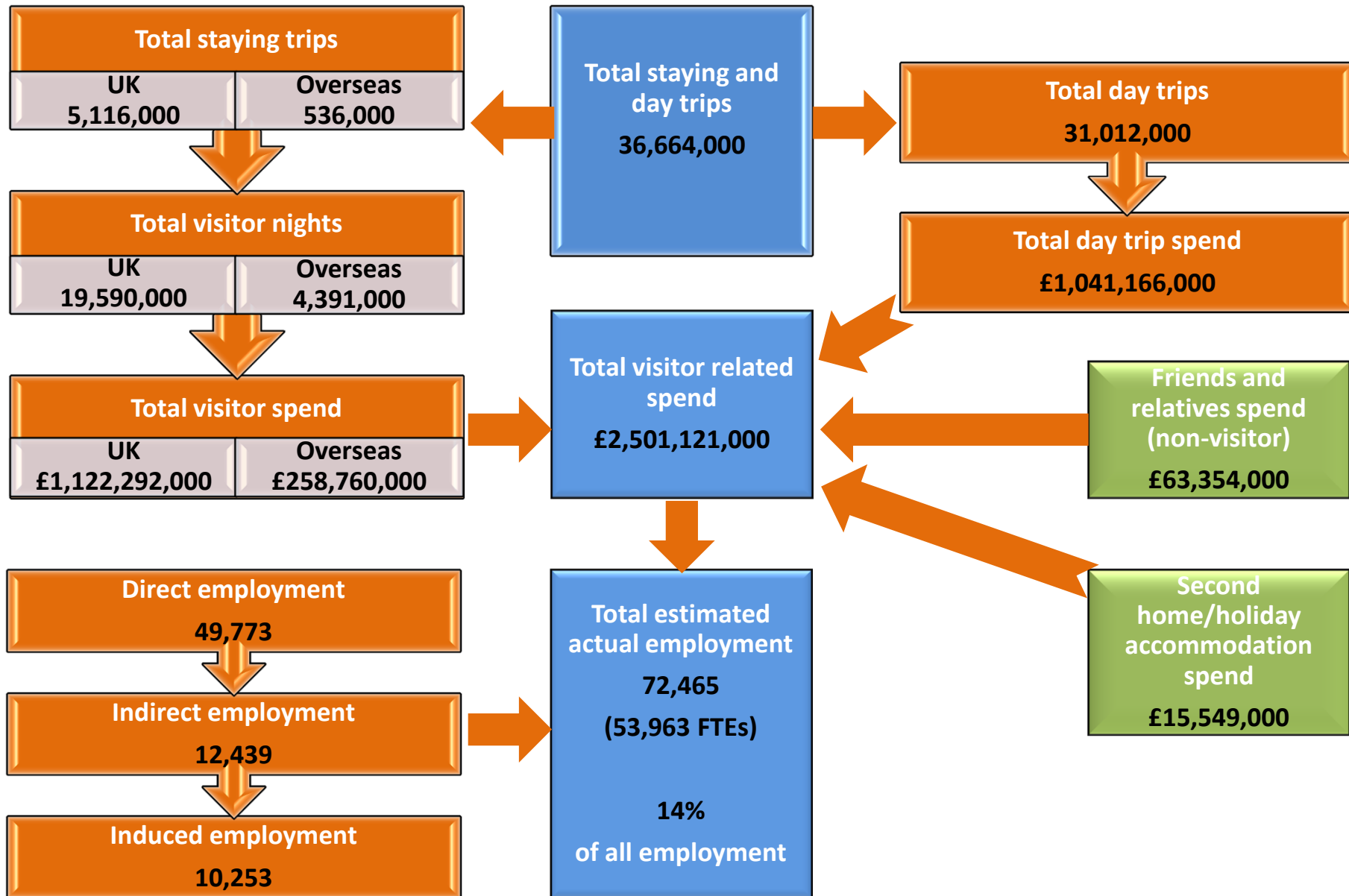


Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	2,130	21	2,151
Retailing	467	392	859
Catering	1,085	895	1,980
Attractions/entertainment	753	316	1,069
Transport	229	100	329
Arising from non trip spend	165	0	165
Total Direct	4,828	1,723	6,552

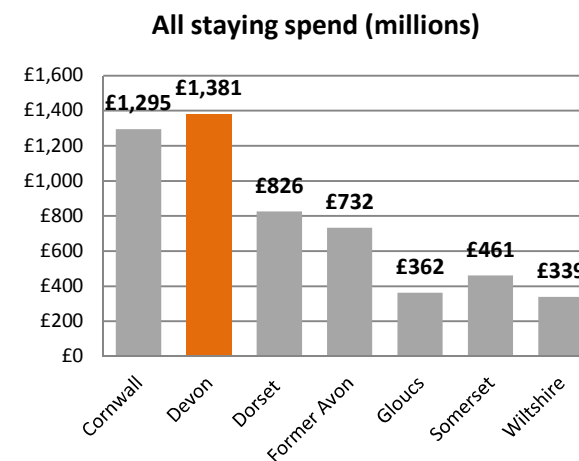
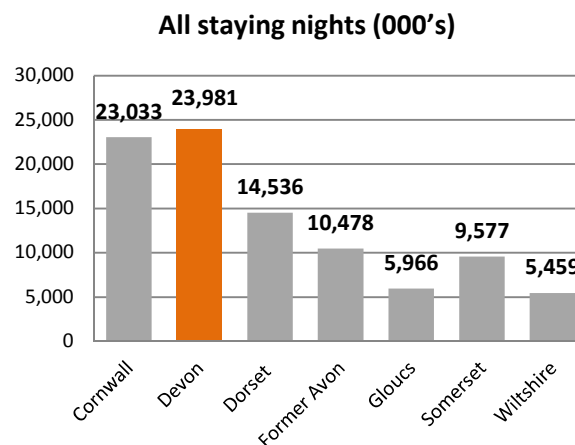
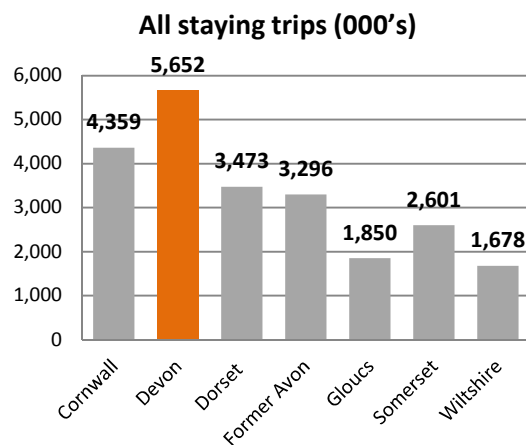
Devon 2013



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	4,040	319	20,720	2,313	£1,168	£127
Devon	5,116	536	19,590	4,391	£1,122	£259
Dorset	3,117	356	11,459	3,077	£649	£177
Former Avon	2,573	723	6,491	3,987	£472	£260
Gloucestershire	1,611	239	4,190	1,776	£248	£115
Somerset	2,389	212	8,072	1,505	£386	£75
Wiltshire	1,429	249	3,930	1,529	£255	£83

Devon - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	1,466,000	3,767,000	£396,885,000
Self catering	538,000	3,005,000	£215,911,000
Touring caravans /tents	544,000	2,492,000	£101,918,000
Static vans/holiday centres	637,000	3,363,000	£170,513,000
Group/campus	84,000	331,000	£12,209,000
Paying guest in private homes	0	0	£0
Second homes	86,000	350,000	£15,078,000
Boat moorings	19,000	92,000	£3,995,000
Other	71,000	127,000	£8,635,000
Staying with friends and relatives	1,671,000	6,063,000	£197,148,000
Total	5,116,000	19,590,000	£1,122,292,000

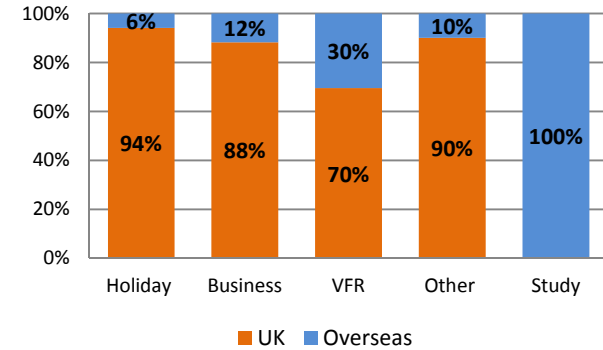
Overseas tourists	Trips	Nights	Spend
Serviced	207,000	837,000	£79,600,000
Self catering	27,000	355,000	£22,303,000
Touring caravans /tents	30,000	196,000	£9,180,000
Static vans/holiday centres	5,000	31,000	£1,590,000
Group/campus	31,000	681,000	£46,901,000
Paying guest in private homes	18,000	336,000	£19,864,000
Second homes	6,000	101,000	£5,129,000
Boat moorings	0	0	£0
Other	8,000	77,000	£3,483,000
Staying with friends and relatives	204,000	1,777,000	£70,710,000
Total	536,000	4,391,000	£258,760,000

Devon - Staying visits by purpose

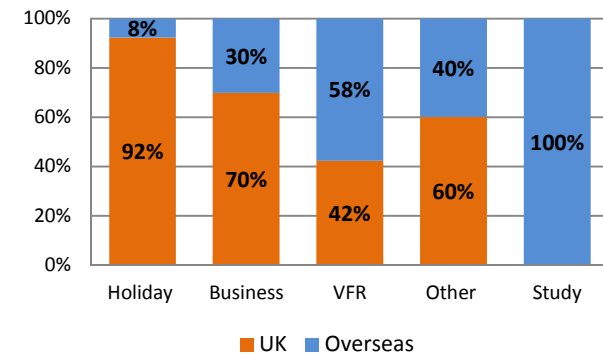
Domestic tourists	Trips	Nights	Spend
Holiday	4,178,000	17,018,000	£977,799,000
Business	372,000	906,000	£75,684,000
Visits to friends and relatives	440,000	1,223,000	£49,334,000
Other	126,000	443,000	£19,475,000
Study	0	0	£0
Total	5,116,000	19,590,000	£1,122,292,000

Overseas tourists	Trips	Nights	Spend
Holiday	261,000	1,430,000	£102,658,000
Business	50,000	392,000	£26,672,000
Visits to friends and relatives	193,000	1,664,000	£67,285,000
Other	14,000	294,000	£19,953,000
Study	18,000	611,000	£42,192,000
Total	536,000	4,391,000	£258,760,000

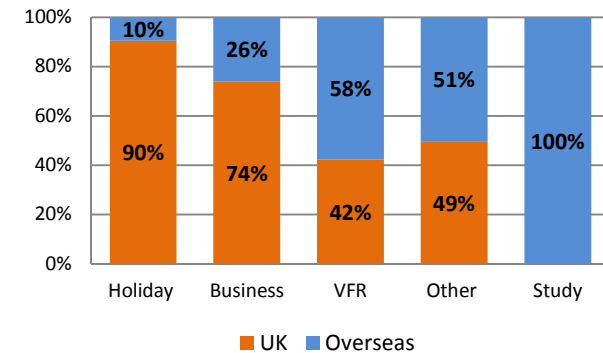
Trips



Nights

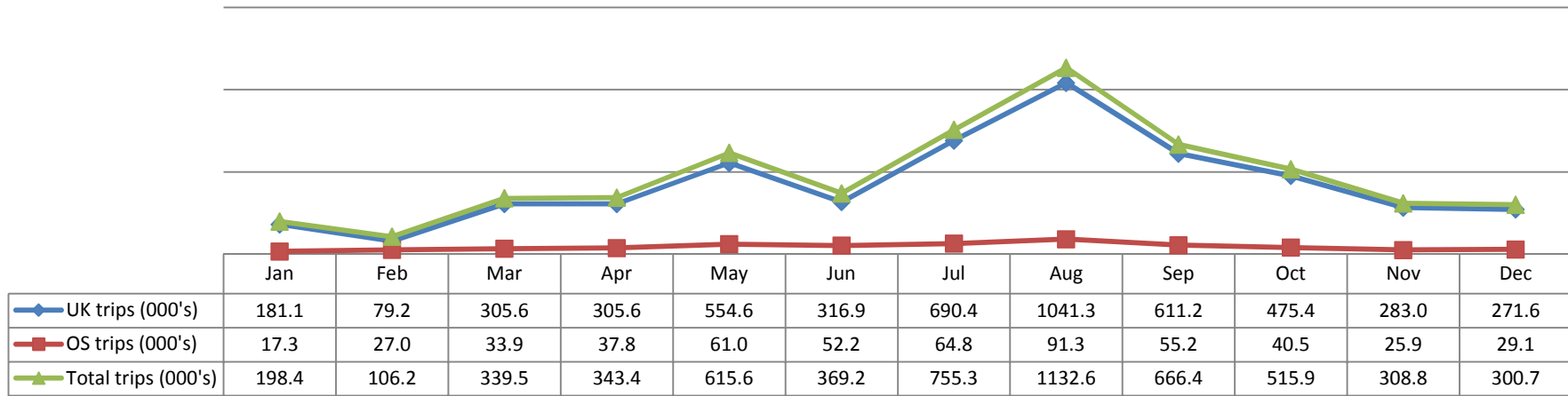


Spend

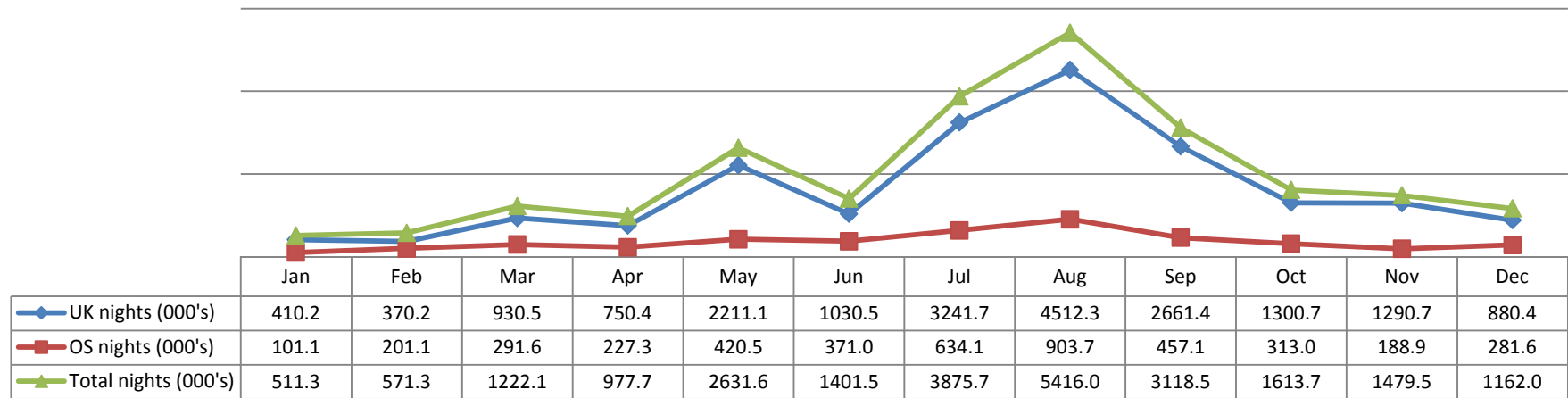


Devon - Estimated seasonality of staying visits

Seasonality - trips

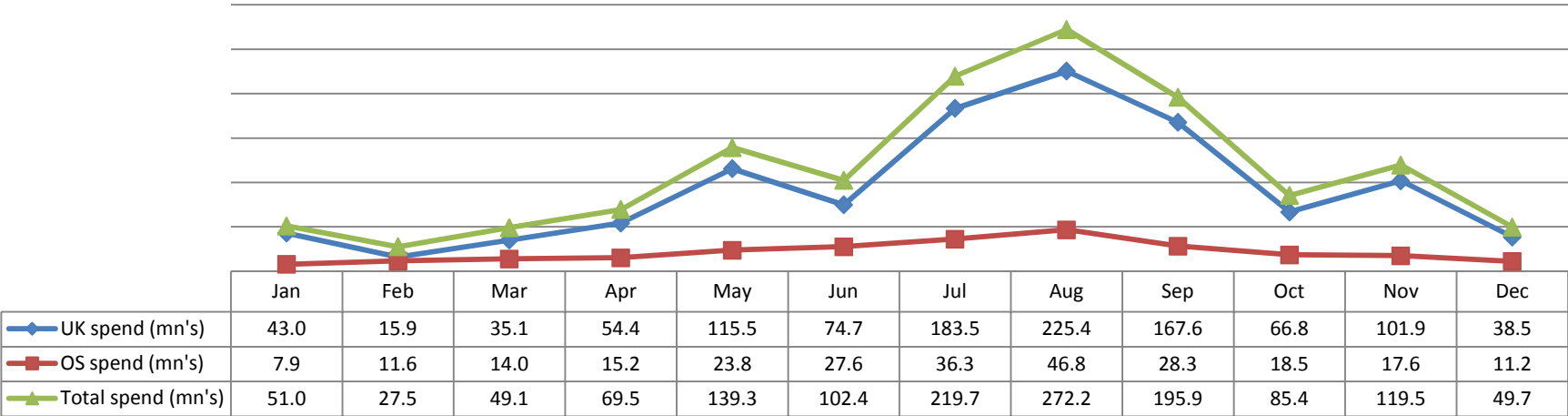


Seasonality - nights

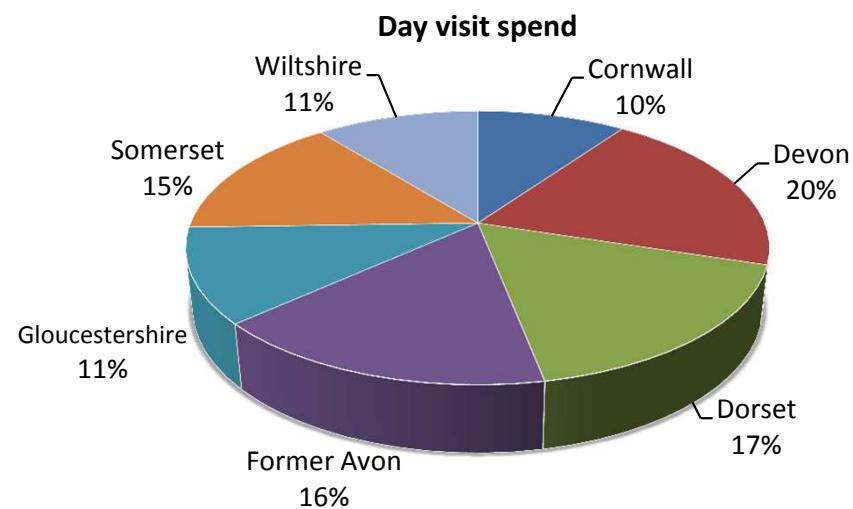
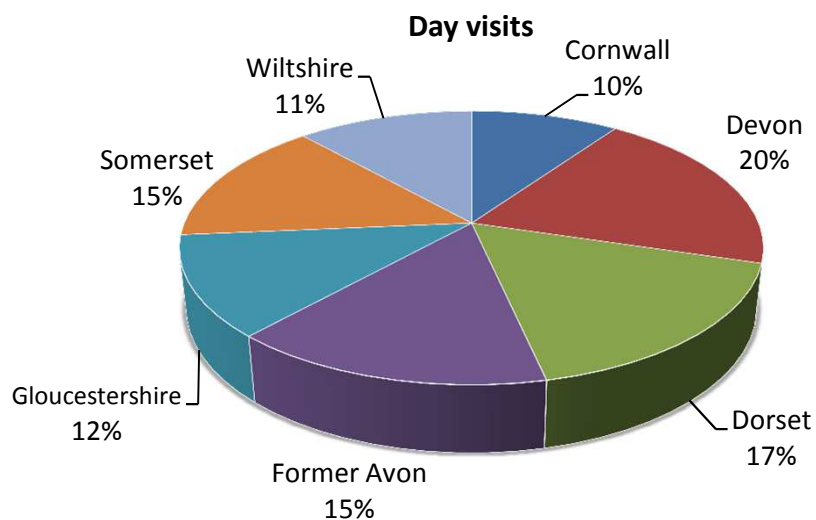


Devon - Estimated seasonality of staying visits

Seasonality - spend



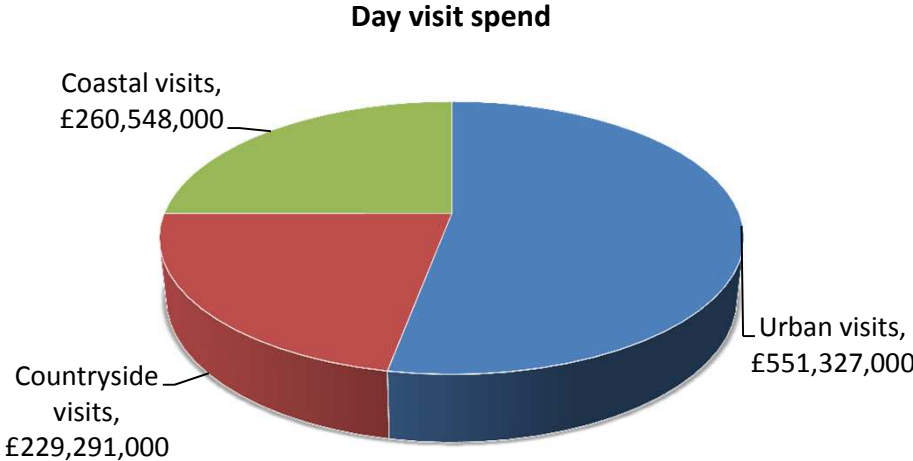
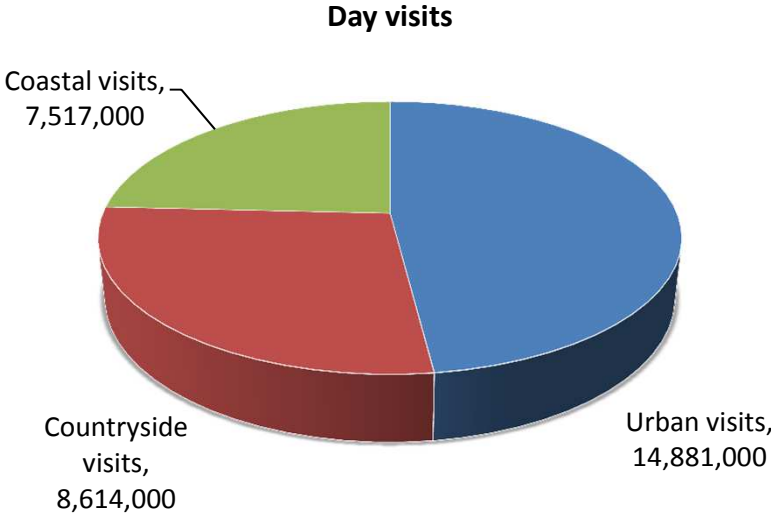
Devon - Day visits in the regional context



Area	Day visits (millions)	Day visit spend (millions)
Cornwall	15.2	£509.1
Devon	31.0	£1,041.2
Dorset	26.3	£887.6
Former Avon	23.6	£851.2
Gloucestershire	18.5	£581.7
Somerset	23.0	£766.9
Wiltshire	18.0	£557.7

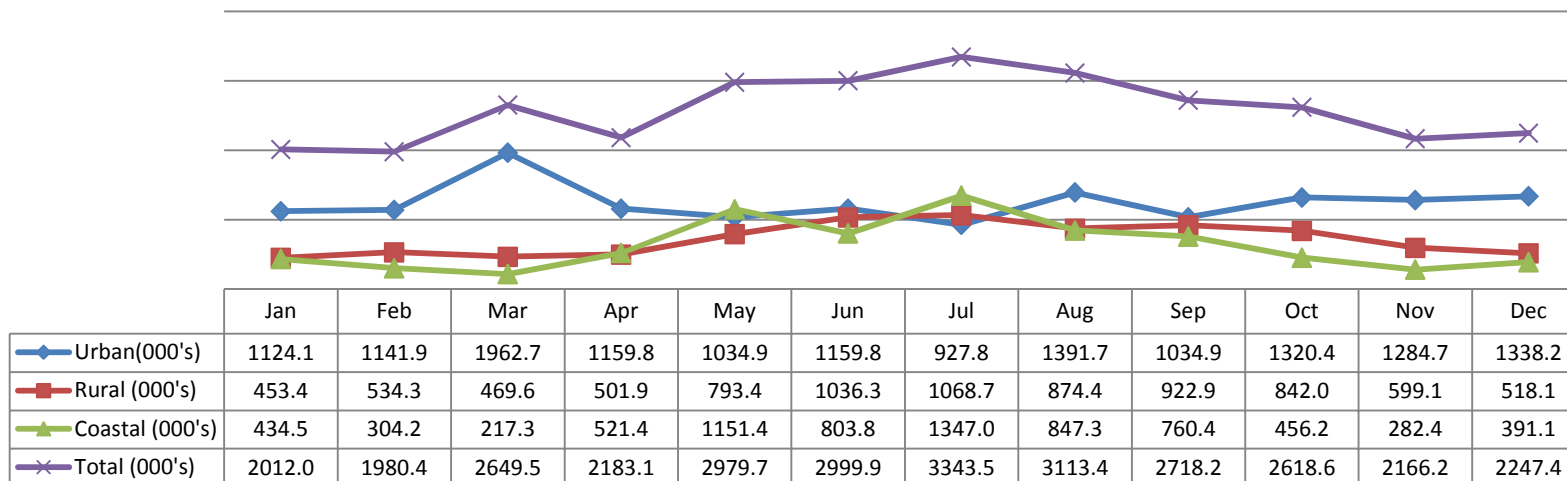
Devon - Day visits by location

Total day visits	Total day visit spend
31,012,000	£1,041,166,000

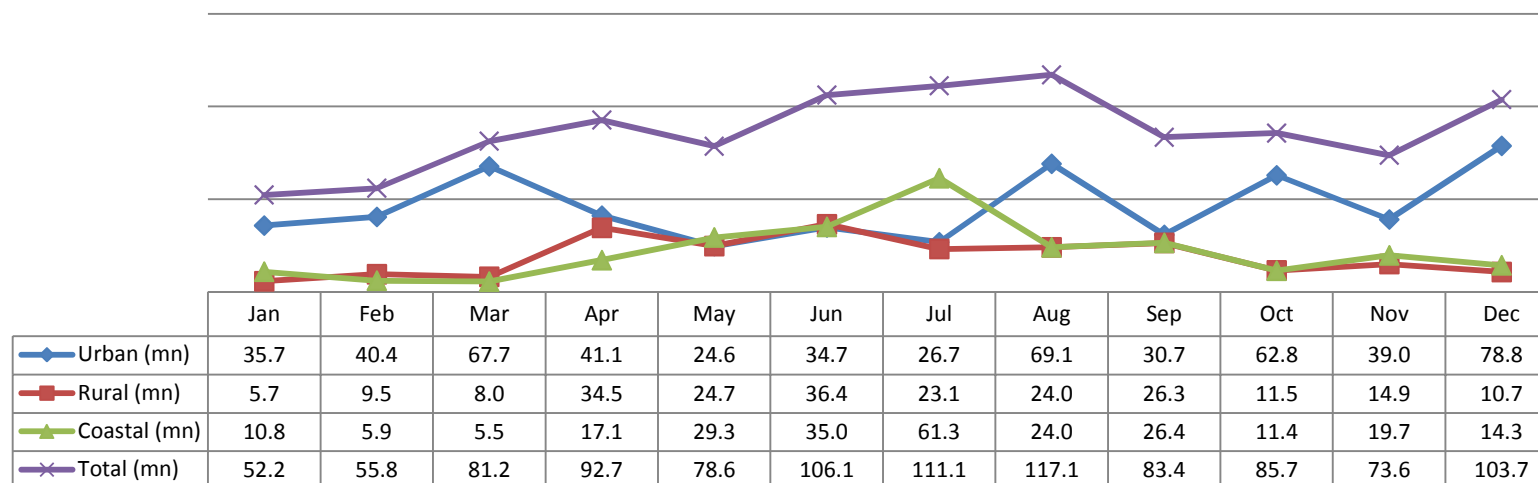


Devon - Estimated seasonality of day visits

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	£496,037,000	£529,853,000	£749,551,000	£274,330,000	£372,447,000	£2,422,218,000
%	20%	22%	31%	11%	15%	



Devon – Direct visitor expenditure by category



Accommodation

- UK staying visitors £421,400,000
- Overseas staying visitors £74,637,000



Shopping

- UK staying visitors £142,368,000
- Overseas staying visitors £75,211,000
- Day visitors £312,274,000



Food & drink

- UK staying visitors £248,662,000
- Overseas staying visitors £54,284,000
- Day visitors £446,605,000



Attractions/entertainment

- UK staying visitors £121,507,000
- Overseas staying visitors £30,846,000
- Day visitors £121,977,000



Travel

- UK staying visitors £188,356,000
- Overseas staying visitors £23,781,000
- Day visitors £160,310,000

Devon – Other visitor related expenditure by category



Second Homes
£8,175,000



Boats
£7,374,000



Visiting friends and relatives (non-visitor spend)
£63,354,000

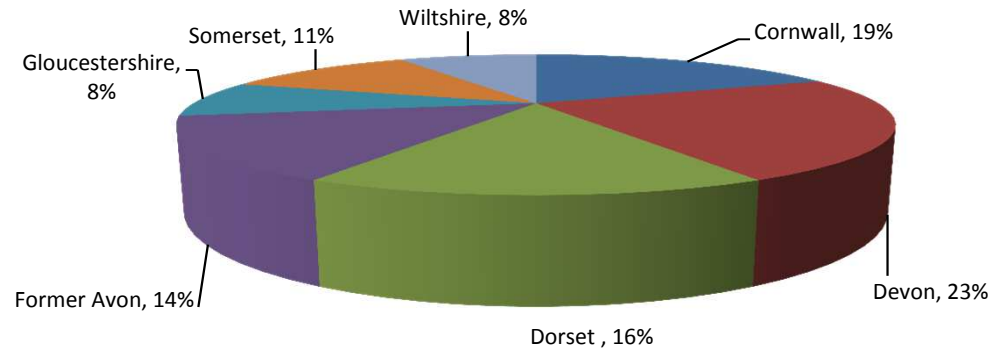
Devon – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£502,096,000	£8,932,000	£511,028,000
Retailing	£215,403,000	£309,151,000	£524,554,000
Catering	£293,858,000	£433,207,000	£727,065,000
Attractions/entertainment	£157,559,000	£129,566,000	£287,125,000
Transport	£127,282,000	£96,186,000	£223,468,000
Arising from non trip spend	£78,903,000	£0	£78,903,000
Total Direct	£1,375,101,000	£977,042,000	£2,352,143,000

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£1,375,101,000	£977,042,000	£2,352,143,000
Supplier and income induced	£800,052,000	£453,970,000	£1,254,022,000
Total	£2,175,153,000	£1,431,012,000	£3,606,165,000

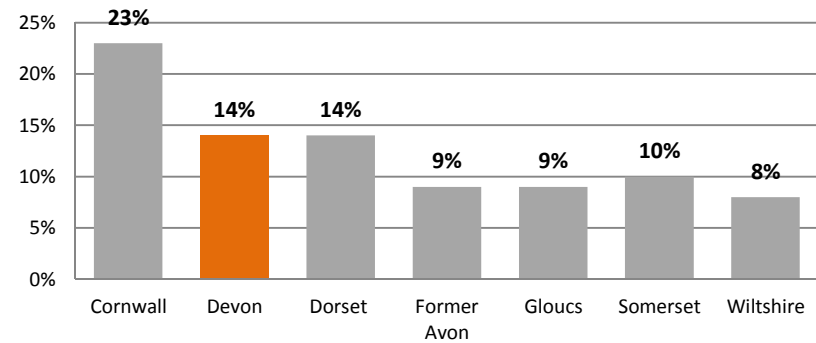
Devon – Tourism related employment in the regional context

Distribution of tourism related employment (FTE's)



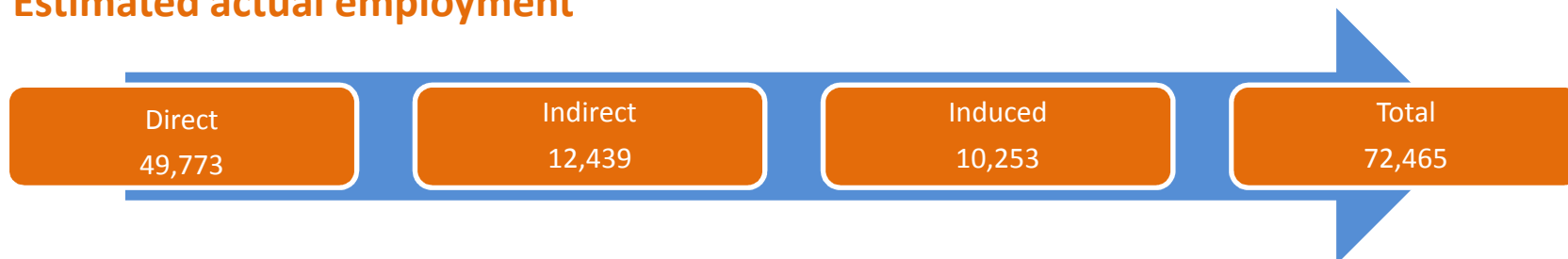
Area	Number of FTE's
Cornwall	43,109
Devon	53,963
Dorset	36,217
Former Avon	32,645
Gloucestershire	19,047
Somerset	26,156
Wiltshire	19,272

% 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	8,794	156	8,951
Retailing	2,079	2,983	5,062
Catering	4,522	6,666	11,187
Attractions/entertainment	3,295	2,710	6,005
Transport	912	689	1,602
Arising from non trip spend	1,252	0	1,252
Total Direct	20,854	13,204	34,058