

The Economic Impact of Devon's Visitor Economy 2014

Torbay



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



October 2015



Contents

	Page
Introduction	3
Torbay data	4
Devon data	13



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 2014. 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 13 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.

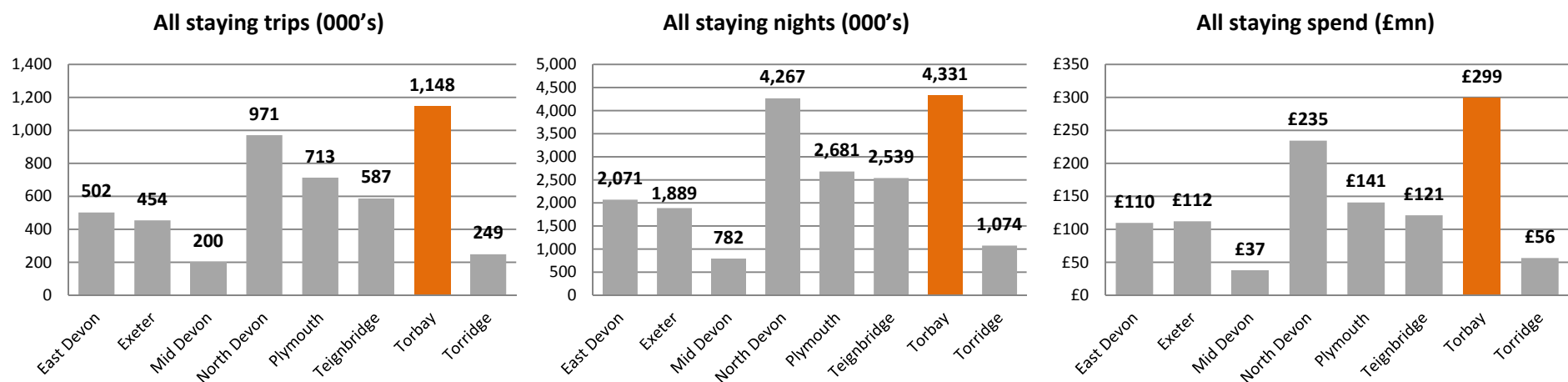
For an overview of 2014, including key facts about the economy, weather and key events please see Appendix 2 of this report.

Value of Tourism 2014

Torbay

Key Facts	
1,148,200	Staying visitor trips
4,331,200	Staying visitor nights
£298,856,000	Staying visitor spend
3,461,000	Day visits
£124,725,000	Day visitor spend
£423,581,000	Direct visitor spend
£9,892,000	Other related spend
£433,473,000	TOTAL VISITOR RELATED SPEND
11,627	Estimated actual employment
8,504	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	461	41	1,776	295	£93	£17
Exeter	402	52	1,347	542	£77	£35
Mid Devon	183	17	667	115	£32	£6
North Devon	916	55	3,932	335	£214	£21
Plymouth	641	72	2,134	547	£109	£32
Teignbridge	553	34	2,310	229	£109	£12
Torbay	1,051	97	3,806	525	£261	£38
Torridge	231	18	947	127	£49	£7

Torbay - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	520,000	1,415,000	£144,527,000
Self catering	98,000	554,000	£41,549,000
Touring caravans /tents	35,000	160,000	£5,808,000
Static vans/holiday centres	179,000	879,000	£42,866,000
Group/campus	2,000	7,000	£370,000
Paying guest in private homes	0	0	£0
Second homes	10,000	47,000	£1,569,000
Boat moorings	6,000	25,000	£1,096,000
Other	10,000	23,000	£847,000
Staying with friends and relatives	192,000	695,000	£21,974,000
Total	1,051,000	3,806,000	£260,605,000

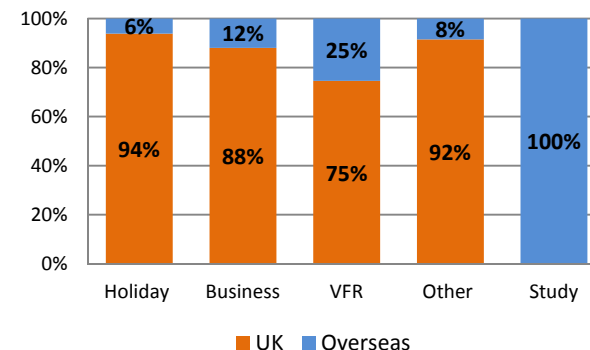
Overseas tourists	Trips	Nights	Spend
Serviced	64,900	223,700	£22,581,000
Self catering	4,500	50,100	£3,326,000
Touring caravans /tents	1,900	10,400	£504,000
Static vans/holiday centres	1,000	5,100	£299,000
Group/campus	500	9,100	£637,000
Paying guest in private homes	4,400	70,500	£4,327,000
Second homes	600	7,500	£392,000
Boat moorings	0	0	£0
Other	800	5,300	£247,000
Staying with friends and relatives	18,800	143,400	£5,940,000
Total	97,200	525,200	£38,251,000

Torbay - Staying visits by purpose

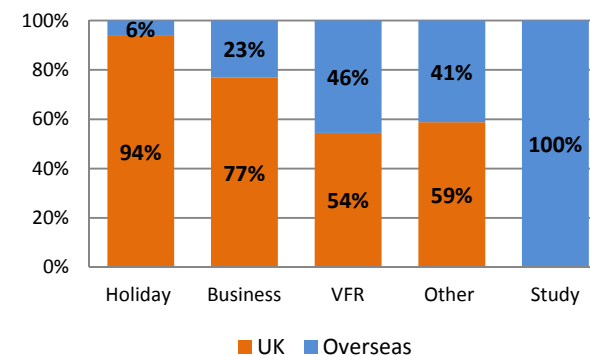
Domestic tourists	Trips	Nights	Spend
Holiday	858,000	3,364,000	£223,057,000
Business	129,000	276,000	£15,517,000
Visits to friends and relatives	51,000	130,000	£13,837,000
Other	14,000	35,000	£8,194,000
Study	0	0	£0
Total	1,051,000	3,806,000	£260,605,000

Overseas tourists	Trips	Nights	Spend
Holiday	56,100	224,100	£17,587,000
Business	17,500	83,300	£8,052,000
Visits to friends and relatives	17,400	108,800	£5,193,000
Other	1,300	24,500	£1,705,000
Study	4,800	84,500	£5,714,000
Total	97,200	525,200	£38,251,000

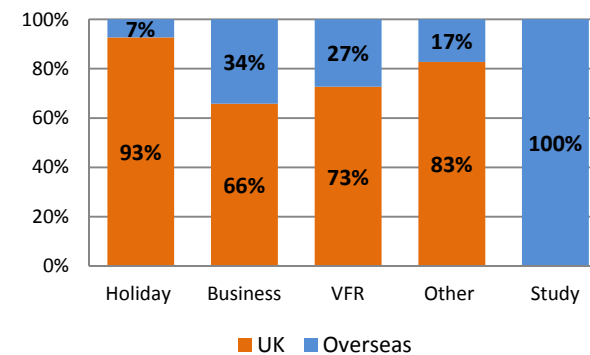
Trips



Nights

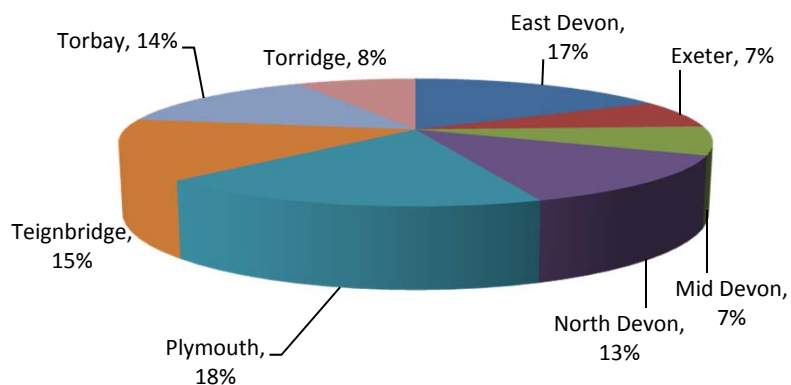


Spend

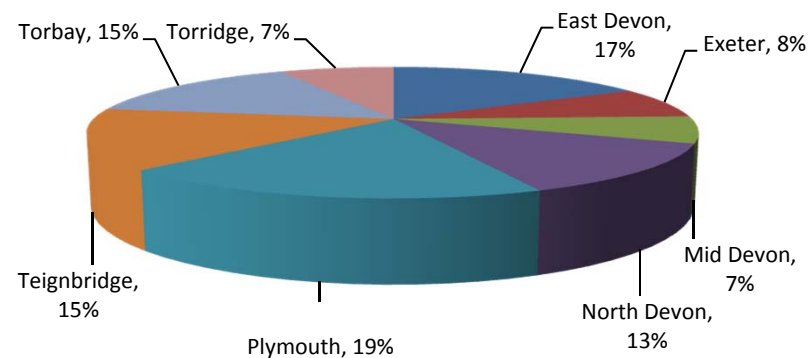


Torbay - Day visits in the county context

All day visits



All day visit spend

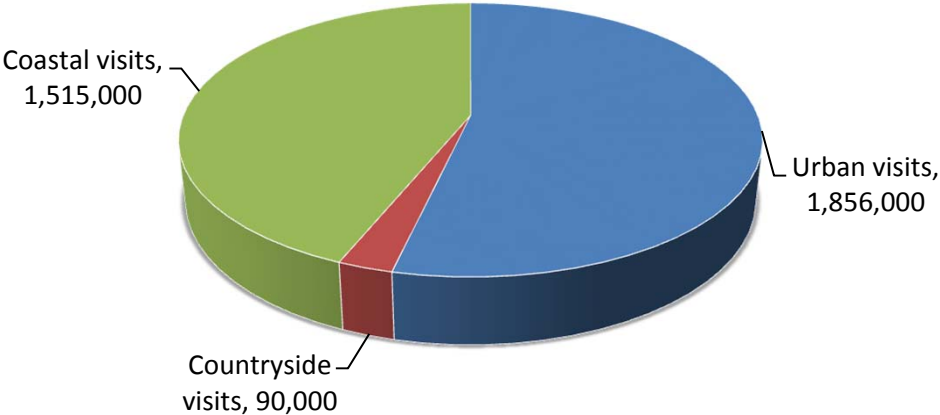


Area	Day visits	Day visit spend
East Devon	4.1	£139.6
Exeter	1.7	£62.7
Mid Devon	1.7	£54.8
North Devon	3.1	£105.3
Plymouth	4.3	£159.4
Teignbridge	3.7	£123.5
Torbay	3.5	£124.7
Torrige	1.9	£61.5

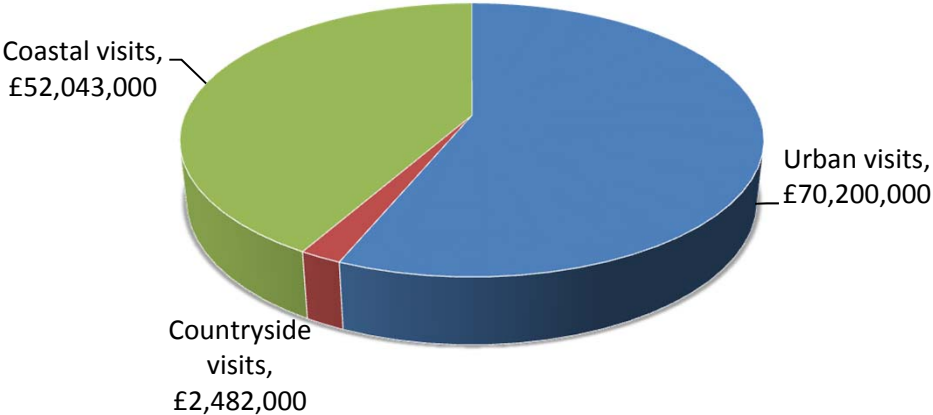
Torbay - Day visits by location

Total day visits	Total day visit spend
3,461,000	£124,725,000

Day visits



Day visit spend



Torbay – Direct visitor expenditure by category



Accommodation

- UK staying visitors £97,137,000
- Overseas staying visitors £12,482,000



Shopping

- UK staying visitors £33,220,000
- Overseas staying visitors £10,270,000
- Day visitors £36,583,000



Food & drink

- UK staying visitors £57,921,000
- Overseas staying visitors £7,913,000
- Day visitors £54,247,000



Attractions/entertainment

- UK staying visitors £28,434,000
- Overseas staying visitors £4,082,000
- Day visitors £12,726,000



Travel

- UK staying visitors £43,894,000
- Overseas staying visitors £3,503,000
- Day visitors £21,169,000

Torbay – Other visitor related expenditure by category



Second Homes

£905,000



Boats

£2,190,000



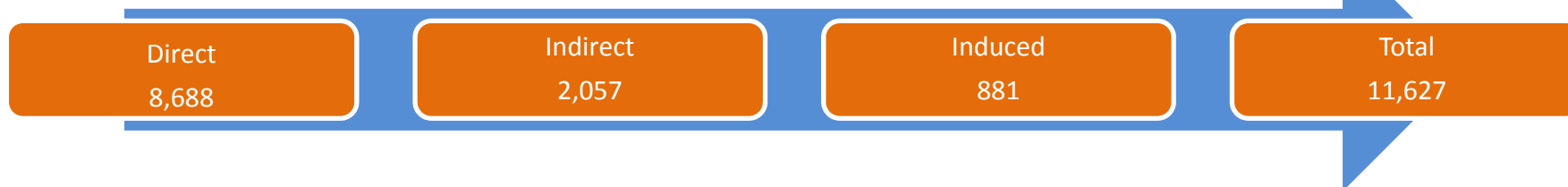
Visiting friends and relatives (non-visitor spend)

£6,797,000

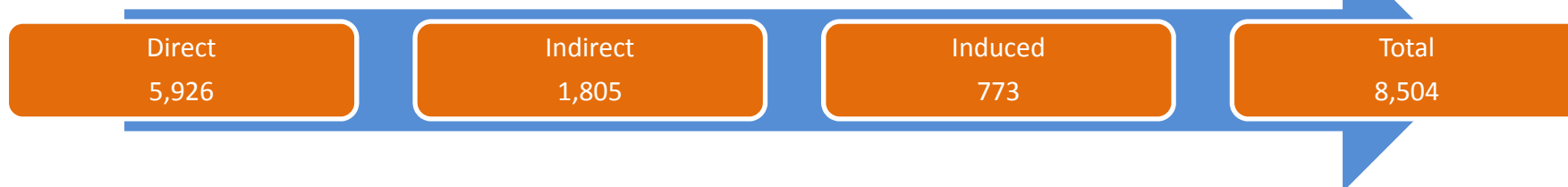
- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay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

Torbay – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)

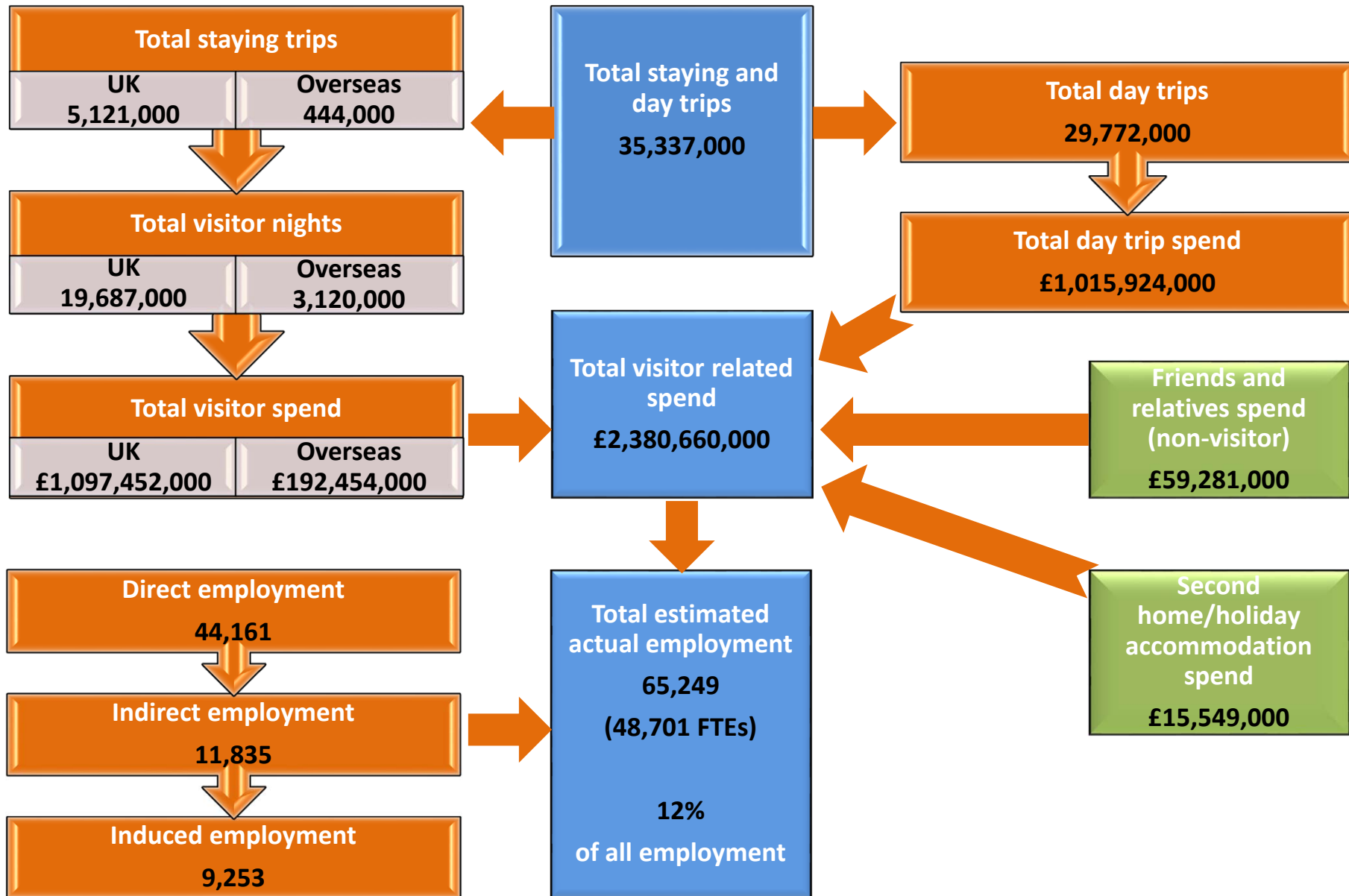


Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	1,966	19	1,985
Retailing	424	356	780
Catering	1,006	829	1,835
Attractions/entertainment	618	251	869
Transport	208	93	301
Arising from non trip spend	157	0	157
Total Direct	4,378	1,548	5,926

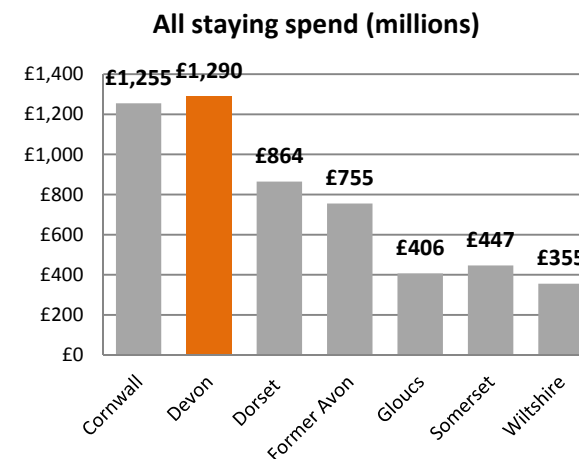
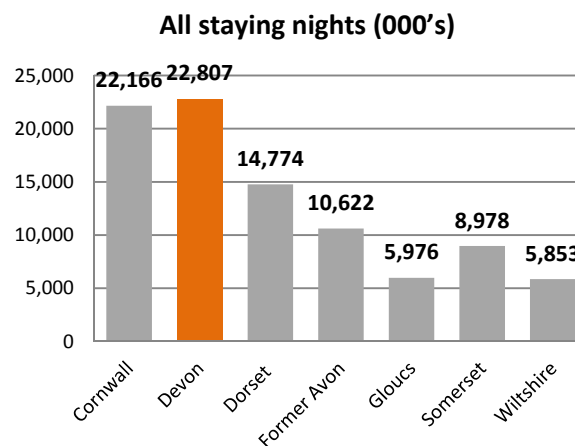
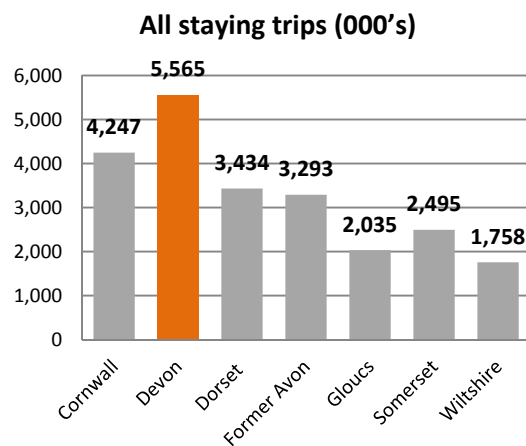
Devon 2014



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	3,912	335	19,821	2,345	£1,117	£138
Devon	5,121	444	19,687	3,120	£1,097	£192
Dorset	3,098	336	11,705	3,069	£682	£183
Former Avon	2,592	701	6,465	4,157	£498	£257
Gloucestershire	1,751	284	4,201	1,775	£290	£116
Somerset	2,303	192	7,631	1,347	£380	£66
Wiltshire	1,471	287	4,099	1,754	£258	£97

Devon - Staying visits by accommodation type

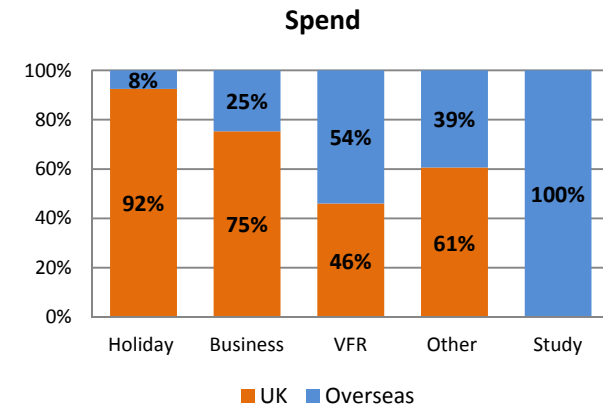
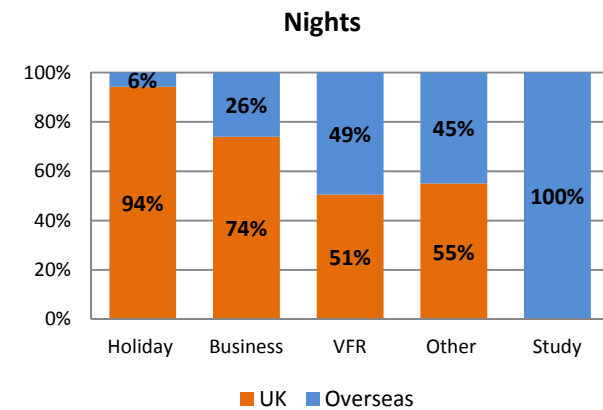
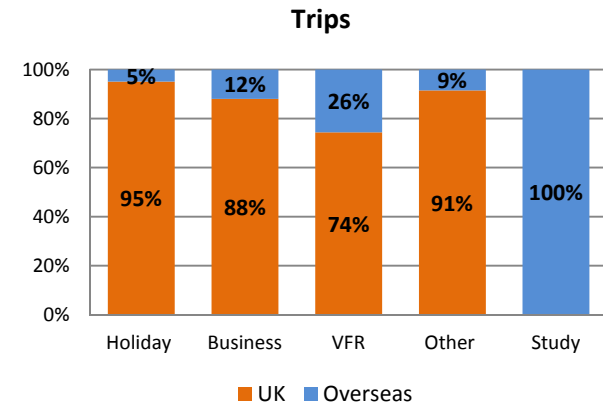
Domestic tourists	Trips	Nights	Spend
Serviced	1,403,000	3,814,000	£389,608,000
Self catering	497,000	2,821,000	£211,469,000
Touring caravans /tents	511,000	2,327,000	£84,483,000
Static vans/holiday centres	732,000	3,595,000	£175,406,000
Group/campus	113,000	349,000	£19,594,000
Paying guest in private homes	0	0	£0
Second homes	91,000	429,000	£14,181,000
Boat moorings	19,000	85,000	£3,692,000
Other	84,000	204,000	£7,382,000
Staying with friends and relatives	1,671,000	6,063,000	£191,636,000
Total	5,121,000	19,687,000	£1,097,452,000

Overseas tourists	Trips	Nights	Spend
Serviced	175,000	603,000	£60,872,000
Self catering	23,000	255,000	£16,928,000
Touring caravans /tents	27,000	152,000	£7,326,000
Static vans/holiday centres	4,000	21,000	£1,223,000
Group/campus	24,000	481,000	£33,701,000
Paying guest in private homes	15,000	243,000	£14,903,000
Second homes	5,000	68,000	£3,541,000
Boat moorings	0	0	£0
Other	7,000	46,000	£2,153,000
Staying with friends and relatives	164,000	1,251,000	£51,807,000
Total	444,000	3,120,000	£192,454,000

Devon - Staying visits by purpose

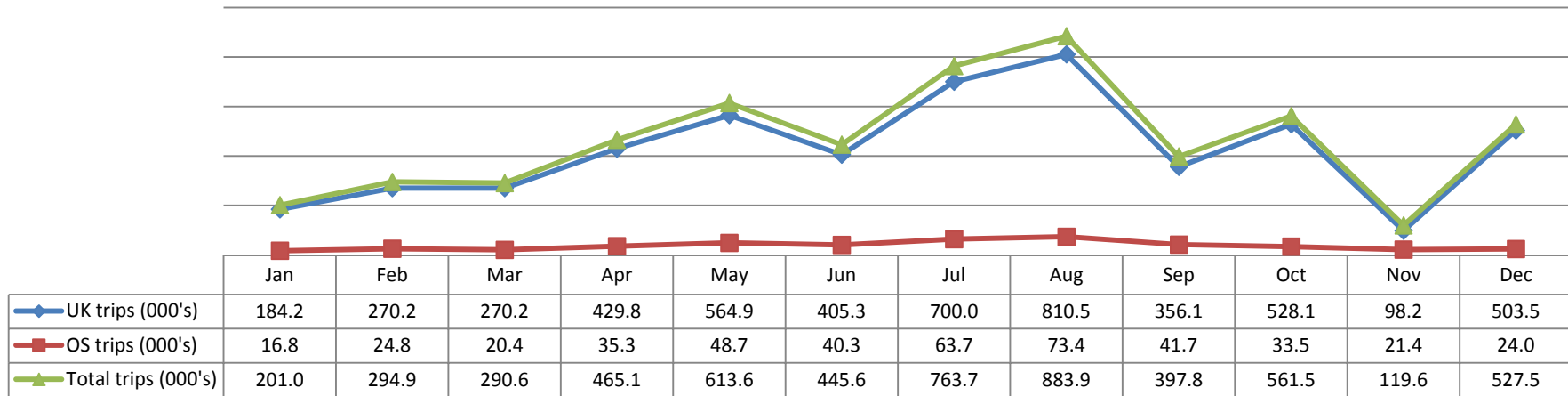
Domestic tourists	Trips	Nights	Spend
Holiday	4,223,000	17,409,000	£953,978,000
Business	339,000	766,000	£73,497,000
Visits to friends and relatives	441,000	1,191,000	£43,950,000
Other	118,000	321,000	£26,026,000
Study	0	0	£0
Total	5,121,000	19,687,000	£1,097,452,000

Overseas tourists	Trips	Nights	Spend
Holiday	218,000	1,066,000	£77,526,000
Business	46,000	269,000	£24,133,000
Visits to friends and relatives	152,000	1,165,000	£51,503,000
Other	11,000	262,000	£16,907,000
Study	17,000	357,000	£22,385,000
Total	444,000	3,120,000	£192,454,000

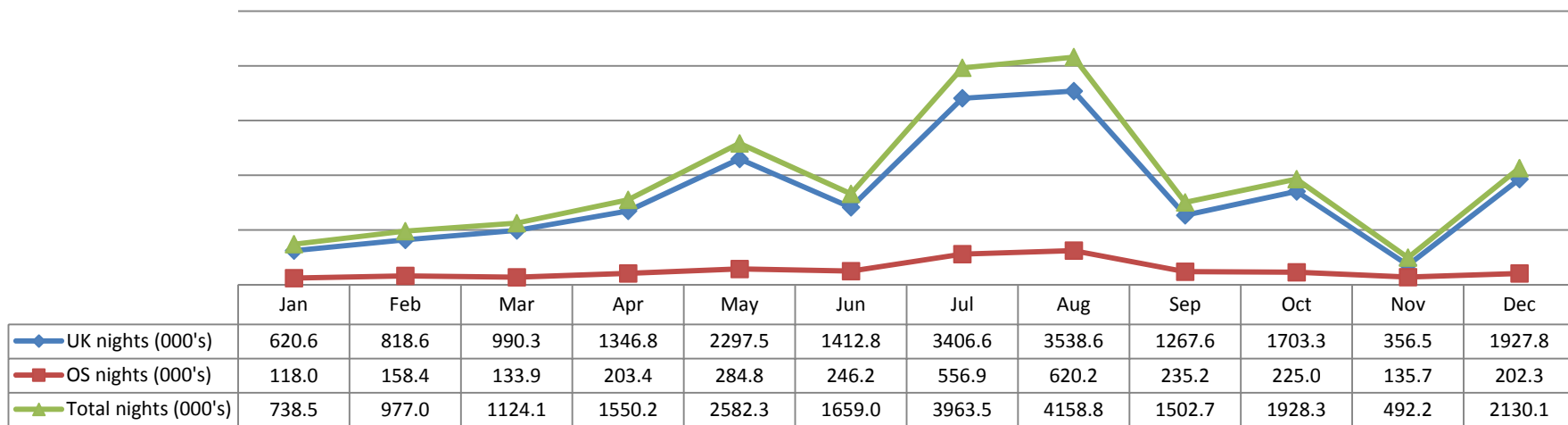


Devon - Estimated seasonality of staying visits

Seasonality - trips

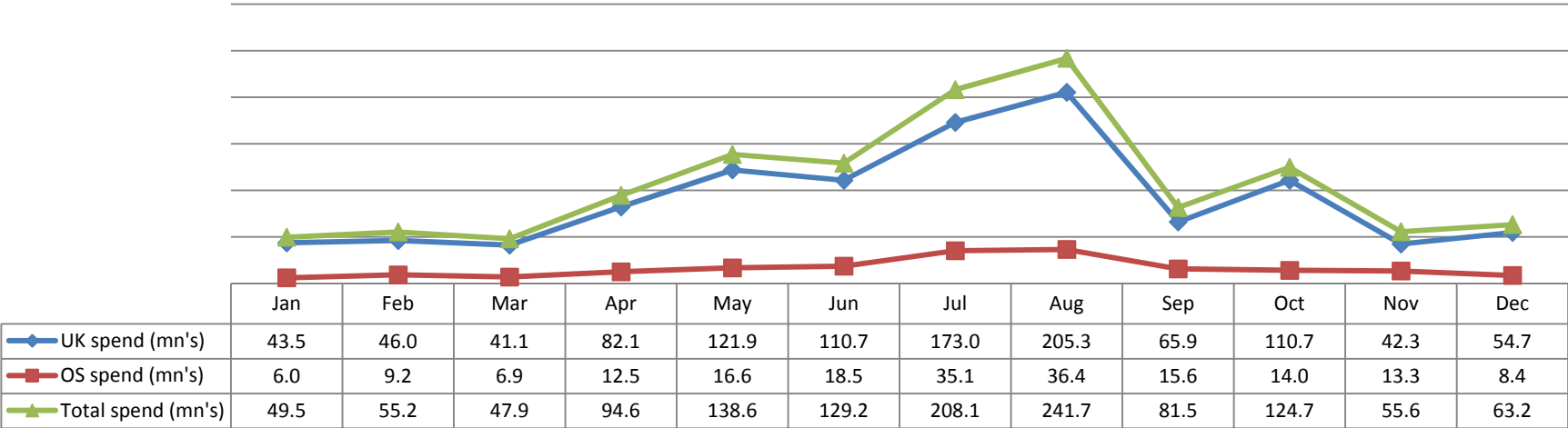


Seasonality - nights

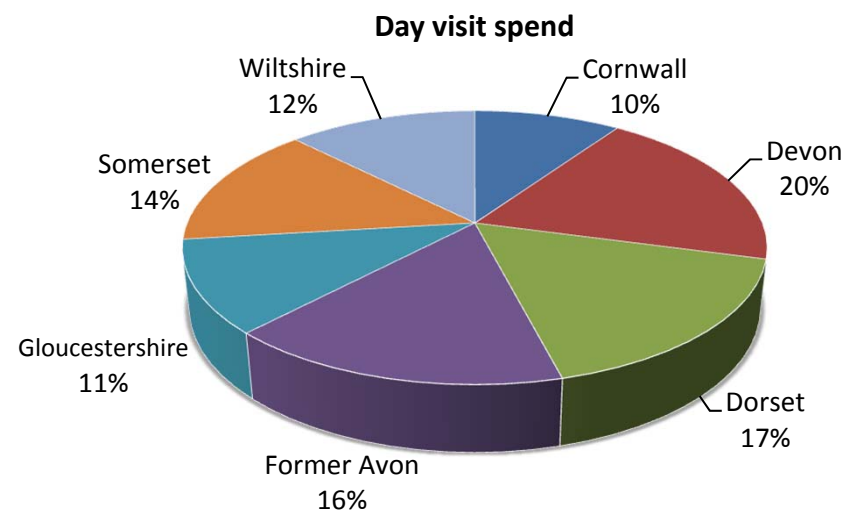
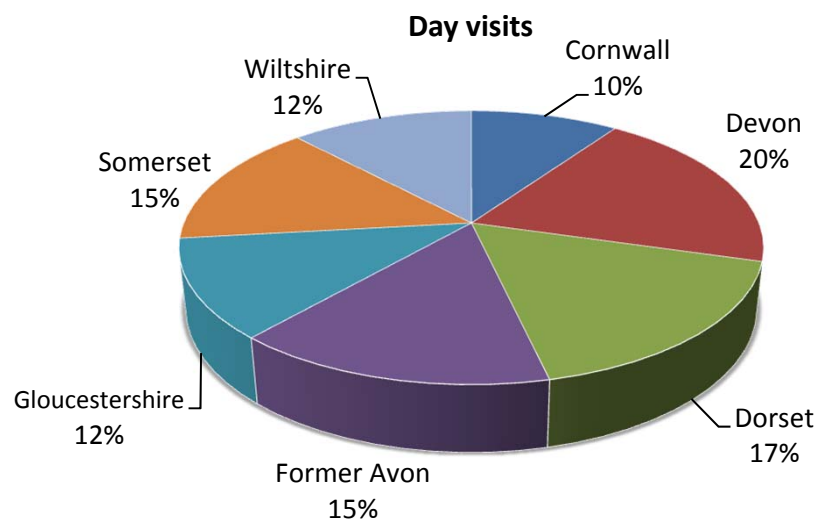


Devon - Estimated seasonality of staying visits

Seasonality - spend



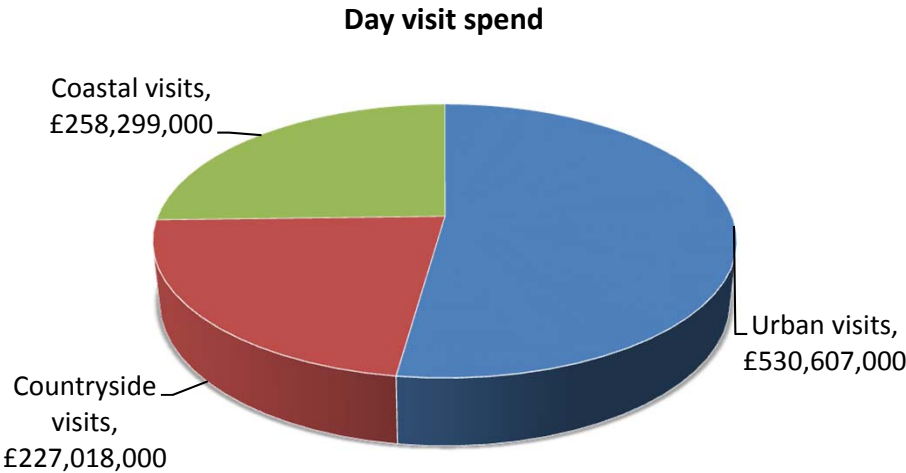
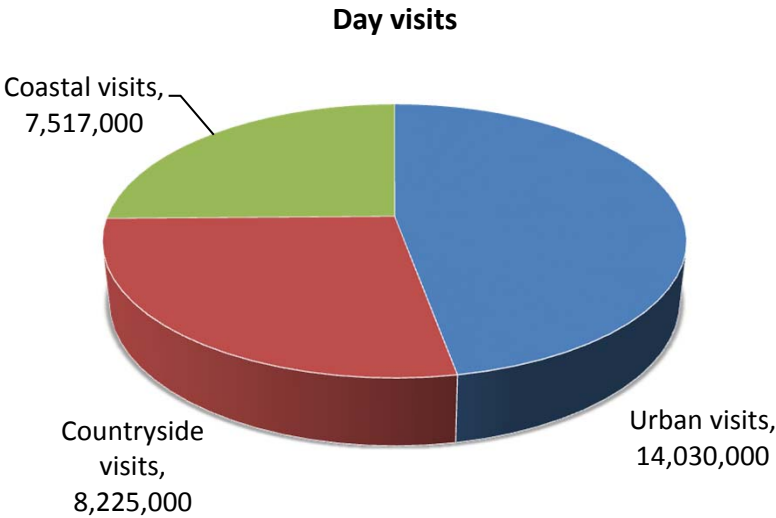
Devon - Day visits in the regional context



Area	Day visits (millions)	Day visit spend (millions)
Cornwall	14.6	£499.8
Devon	29.8	£1,015.9
Dorset	25.5	£870.8
Former Avon	22.8	£839.3
Gloucestershire	17.7	£568.9
Somerset	22.3	£751.4
Wiltshire	18.1	£646.2

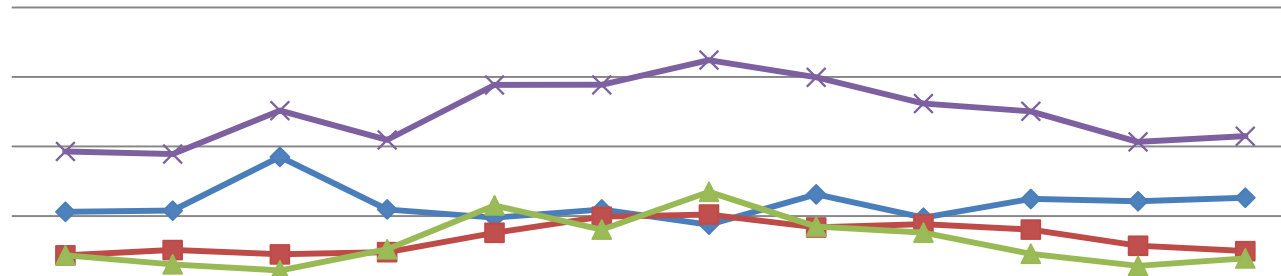
Devon - Day visits by location

Total day visits	Total day visit spend
29,772,000	£1,015,924,000



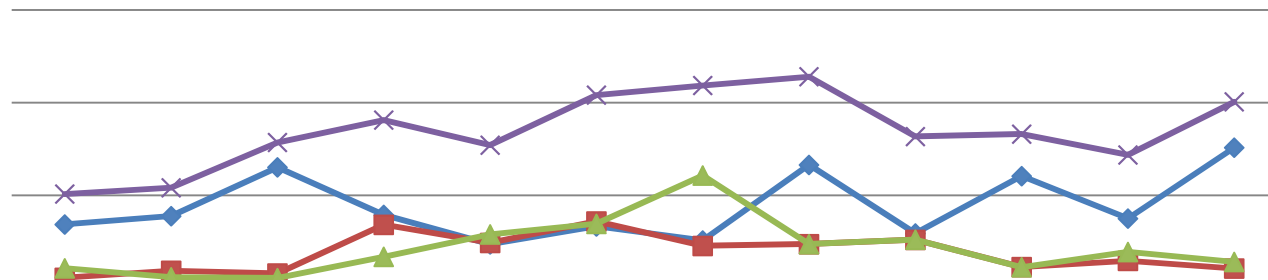
Devon - Estimated seasonality of day visits

Seasonality - day visits (000's)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban(000's)	1059.8	1076.6	1850.5	1093.5	975.7	1093.5	874.8	1312.2	975.7	1244.9	1211.2	1261.7
Rural (000's)	432.9	510.2	448.4	479.3	757.6	989.5	1020.4	834.9	881.3	803.9	572.0	494.7
Coastal (000's)	434.5	304.2	217.3	521.4	1151.4	803.8	1347.0	847.3	760.4	456.2	282.4	391.1
Total (000's)	1927.2	1891.0	2516.1	2094.2	2884.7	2886.8	3242.1	2994.3	2617.3	2505.0	2065.7	2147.5

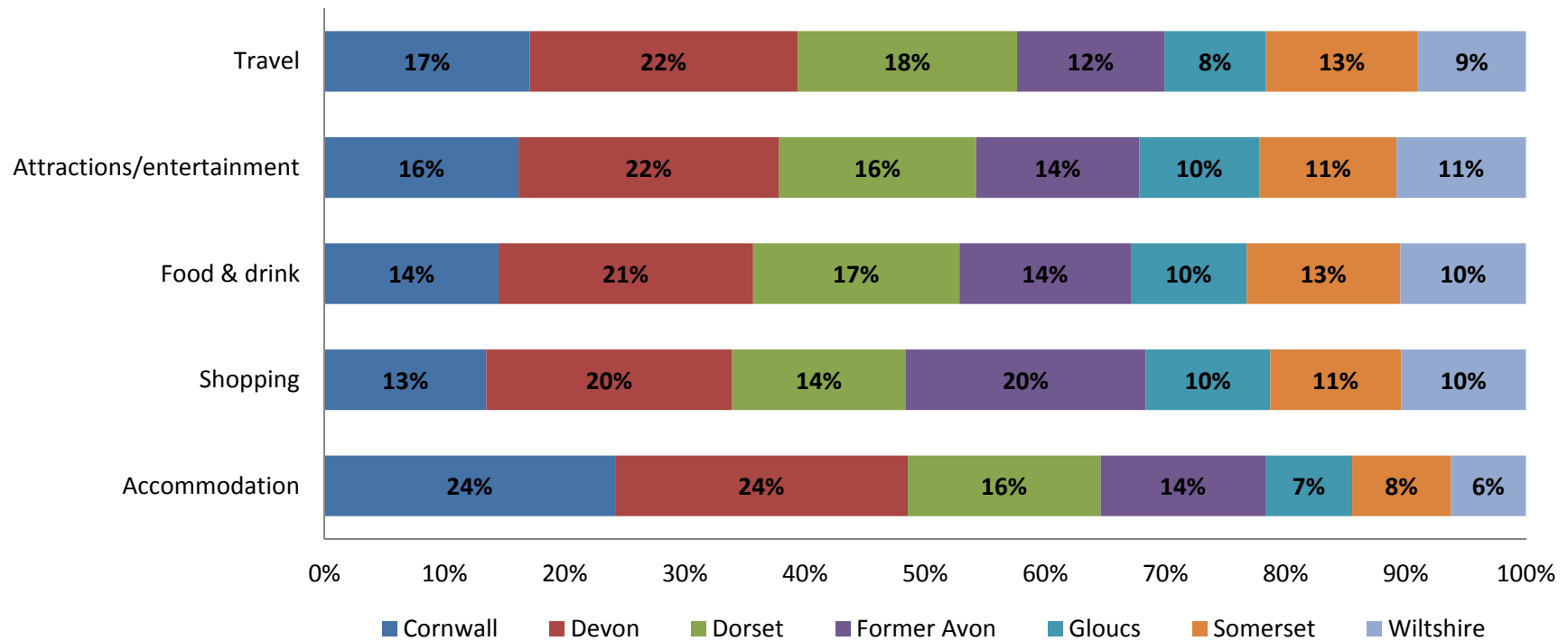
Seasonality - day visit spend (millions)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban (mn)	34.4	38.9	65.2	39.5	23.7	33.4	25.7	66.5	29.6	60.5	37.6	75.8
Rural (mn)	5.6	9.4	7.9	34.2	24.5	36.0	22.8	23.8	26.1	11.4	14.7	10.6
Coastal (mn)	10.7	5.9	5.5	16.9	29.0	34.7	60.8	23.8	26.2	11.3	19.5	14.1
Total (mn)	50.7	54.2	78.5	90.6	77.1	104.1	109.3	114.0	81.8	83.1	71.9	100.5

Devon – Direct visitor expenditure by category in the regional context

Devon	Accommodation	Shopping	Food & drink	Attractions/entertainment	Travel	TOTAL
Spend	£469,277,000	£496,760,000	£720,428,000	£260,179,000	£359,186,000	£2,305,830,000
%	20%	22%	31%	11%	16%	



Devon – Direct visitor expenditure by category



Accommodation

- UK staying visitors £412,974,000
- Overseas staying visitors £56,303,000



Shopping

- UK staying visitors £139,121,000
- Overseas staying visitors £55,137,000
- Day visitors £302,502,000



Food & drink

- UK staying visitors £242,809,000
- Overseas staying visitors £40,929,000
- Day visitors £436,690,000



Attractions/entertainment

- UK staying visitors £118,765,000
- Overseas staying visitors £22,079,000
- Day visitors £119,335,000



Travel

- UK staying visitors £183,783,000
- Overseas staying visitors £18,006,000
- Day visitors £157,397,000

Devon – Other visitor related expenditure by category



Second Homes

£8,175,000



Boats

£7,374,000



Visiting friends and relatives (non-visitor spend)

£59,281,000

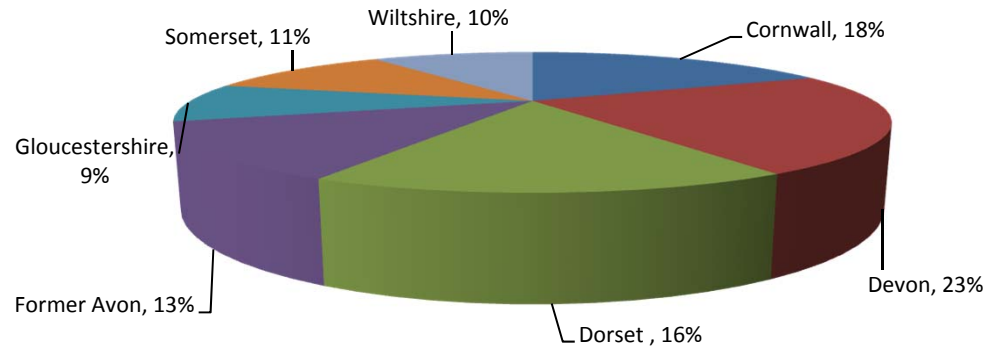
Devon – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£474,952,000	£8,734,000	£483,686,000
Retailing	£192,315,000	£299,477,000	£491,792,000
Catering	£275,226,000	£423,589,000	£698,815,000
Attractions/entertainment	£145,624,000	£126,727,000	£272,351,000
Transport	£121,074,000	£94,438,000	£215,512,000
Arising from non trip spend	£74,830,000	£0	£74,830,000
Total Direct	£1,284,021,000	£952,965,000	£2,236,986,000

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£1,284,021,000	£952,965,000	£2,236,986,000
Supplier and income induced	£733,762,000	£431,622,000	£1,165,384,000
Total	£2,017,783,000	£1,384,587,000	£3,402,370,000

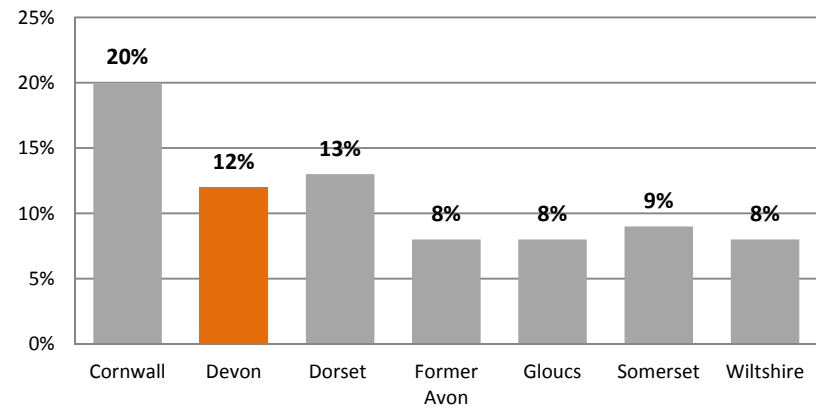
Devon – Tourism related employment in the regional context

Distribution of tourism related employment (FTE's)



Area	Number of FTE's
Cornwall	39,336
Devon	48,701
Dorset	35,054
Former Avon	27,279
Gloucestershire	18,915
Somerset	23,777
Wiltshire	20,937

% 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	7,876	145	8,021
Retailing	1,771	2,757	4,528
Catering	4,057	6,244	10,301
Attractions/entertainment	2,508	2,183	4,690
Transport	829	646	1,475
Arising from non trip spend	1,188	0	1,188
Total Direct	18,228	11,975	30,203