

# The Economic Impact of the Torbay Visitor Economy 2021



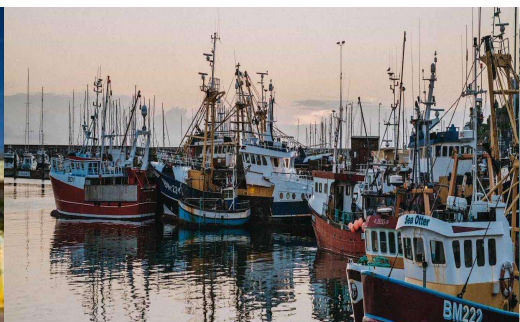
Produced on behalf of the English Riviera BID Company

By

The South West Research Company Ltd



October 2022



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# Introduction

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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 2021. 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 16 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 2021, including key facts about the economy, weather and key events please see Appendix 2 of this report.

## Methodology note

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This year's outputs are for the Covid hit year of 2021 and as a result our approach to the project again needed to change. There has been very limited national survey data available for the subject year due to the pandemic and certainly nothing at a regional level or below, so as a result 2019 outputs were used as the foundation from which 2021 outputs were estimated.

Covid impact data was gathered by TSWRC from February 2020 onwards which was used alongside other local survey data and national level outputs and forecasts and applied to the 2019 outputs for each area to model the 2021 input data. Once the input data was calculated the Cambridge Model was then used to produce the outputs for 2021 and as such, they are comparable with previous years whilst noting the changes above.

Employment figures show a decrease compared to the 2019 data. However, many more tourism jobs will have been supported by Government support schemes in place in 2021 due to the pandemic e.g. furlough scheme. So the 2021 figure is an estimate of jobs supported by the 2021 visitor spend rather than an actual change in the employment numbers when compared to previous years.

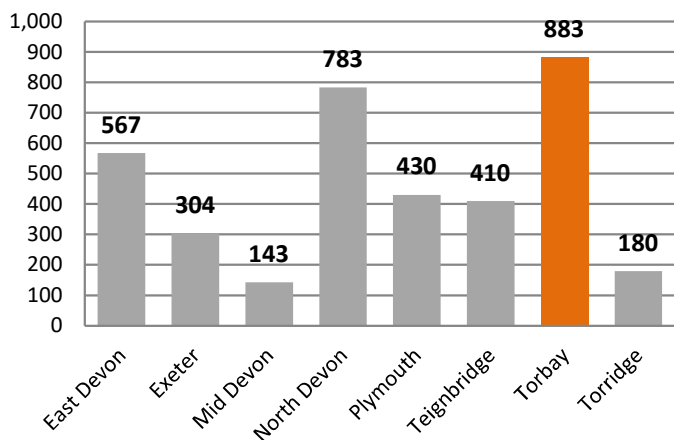
# Value of Tourism 2021

## Torbay

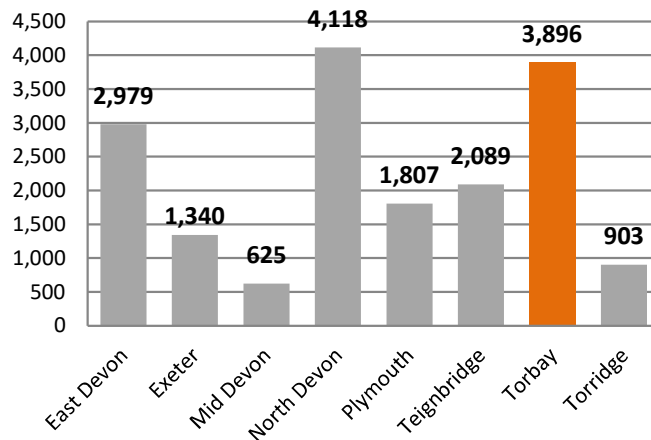
Key Facts	
882,700	Staying visitor trips
3,895,700	Staying visitor nights
£223,503,000	Staying visitor spend
2,739,000	Day visits
£104,027,000	Day visitor spend
£327,530,000	Direct visitor spend
£5,969,760	Other related spend
£333,499,760	TOTAL VISITOR RELATED SPEND
7,698	Estimated actual employment
5,658	FTE employment
13%	Proportion of all employment

# Torbay - Staying visits in the county context

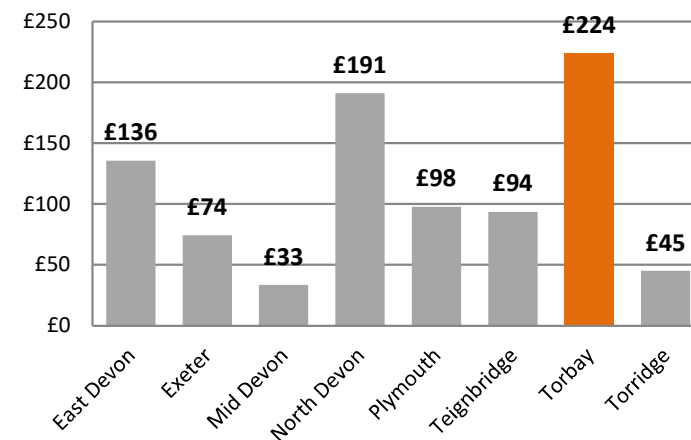
All staying trips (000's)



All staying nights (000's)



All staying spend (£mn)



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	558	9	2,859	120	£132	£4
Exeter	295	9	1,165	175	£69	£6
Mid-Devon	139	4	572	53	£32	£2
North Devon	773	10	4,013	105	£187	£4
Plymouth	416	14	1,579	228	£91	£7
Teignbridge	402	8	1,996	93	£91	£3
Torbay	868	15	3,735	161	£217	£7
Torrige	176	4	854	49	£43	£2

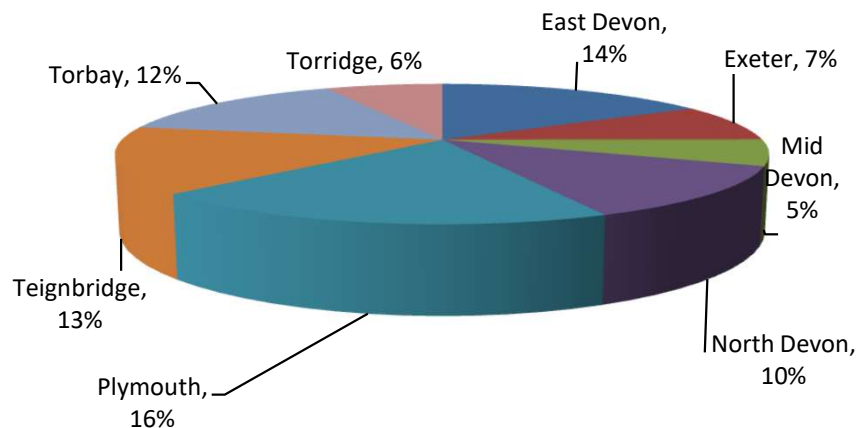
## Torbay - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	509,000	1,716,000	£128,013,000
Self catering	94,000	628,000	£33,389,000
Touring caravans /tents	30,000	180,000	£5,642,000
Static vans/holiday centres	129,000	798,000	£30,654,000
Group/campus	1,000	3,000	£129,000
Paying guest in private homes	0	0	£0
Second homes	9,000	33,000	£1,554,000
Boat moorings	9,000	34,000	£1,579,000
Other	2,000	9,000	£442,000
Staying with friends and relatives	86,000	333,000	£15,589,000
<b>Total</b>	<b>868,000</b>	<b>3,735,000</b>	<b>£216,991,000</b>

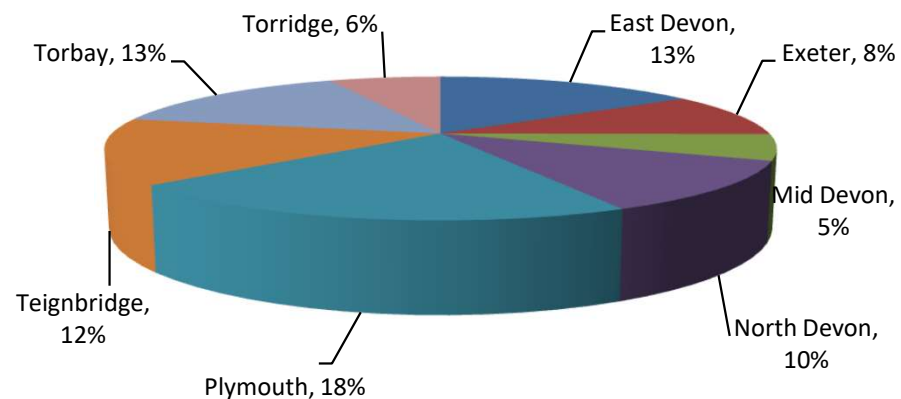
Overseas tourists	Trips	Nights	Spend
Serviced	8,200	47,500	£3,178,000
Self catering	600	8,000	£396,000
Touring caravans /tents	200	2,100	£74,000
Static vans/holiday centres	100	1,000	£41,000
Group/campus	0	1,300	£40,000
Paying guest in private homes	300	24,700	£754,000
Second homes	0	1,300	£45,000
Boat moorings	0	0	£0
Other	200	3,300	£145,000
Staying with friends and relatives	5,100	71,600	£1,838,000
<b>Total</b>	<b>14,700</b>	<b>160,700</b>	<b>£6,512,000</b>

# Torbay - Day visits in the county context

All day visits



All day visit spend



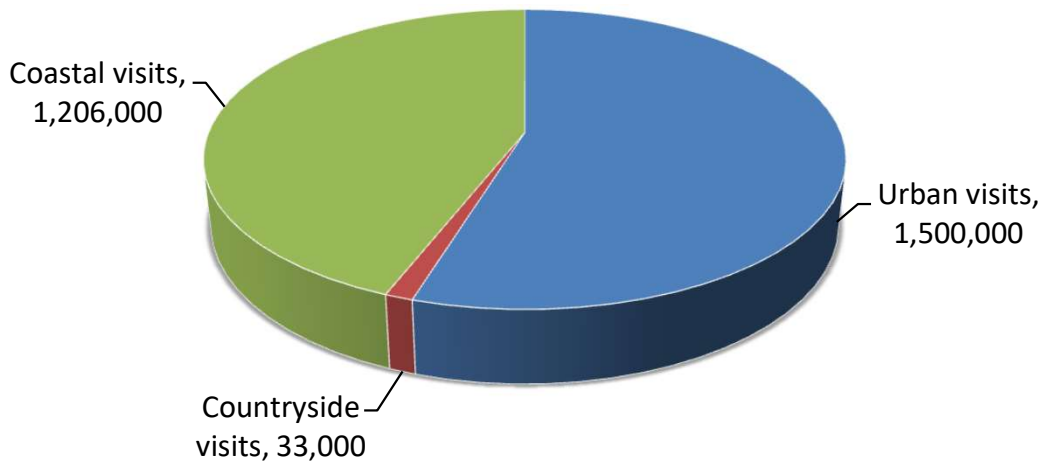
Area	Day visits (mn)	Day visit spend (£mn)
East Devon	3.0	£107.2
Exeter	1.6	£67.3
Mid-Devon	1.1	£40.6
North Devon	2.3	£80.4
Plymouth	3.6	£146.9
Teignbridge	2.8	£102.2
Torbay	2.7	£104.0
Torrige	1.3	£45.6



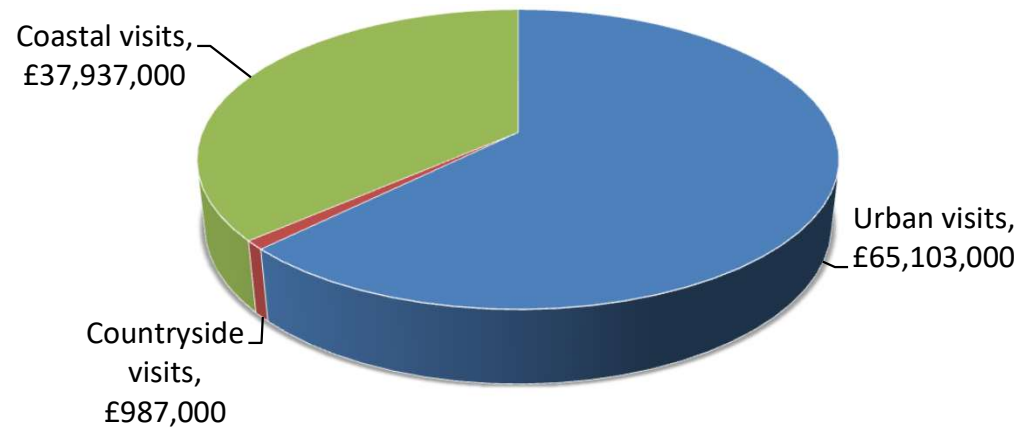
# Torbay - Day visits by location

Total day visits	Total day visit spend
2,739,000	£104,027,000

Day visits



Day visit spend



## Torbay - Direct visitor expenditure by category

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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 £87,428,000
- Overseas staying visitors £1,513,000

## Totals

**£88,941,000 (27%)**



## Shopping

- UK staying visitors £29,222,000
- Overseas staying visitors £2,105,000
- Day visitors £33,536,000

**£64,863,000 (20%)**



## Food & drink

- UK staying visitors £53,200,000
- Overseas staying visitors £1,739,000
- Day visitors £48,764,000

**£103,703,000 (32%)**



## Attractions/entertainment

- UK staying visitors £17,873,000
- Overseas staying visitors £521,000
- Day visitors £7,852,000

**£26,246,000 (8%)**



## Travel

- UK staying visitors £29,268,000
- Overseas staying visitors £634,000
- Day visitors £13,875,000

**£43,777,000 (13%)**

## Torbay – Other visitor related expenditure by category



Second Homes  
£430,000



Boats  
£1,817,000



Visiting friends and relatives (non-visitor spend)  
£3,723,000

- 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

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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.

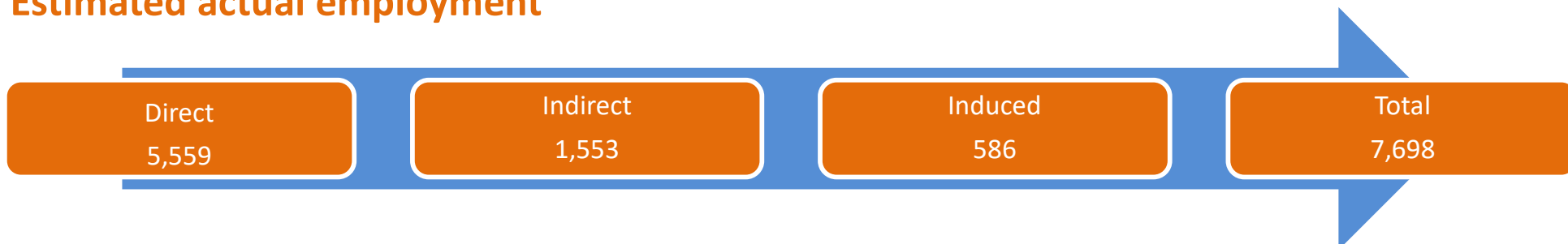
This section of the report looks at employment on three levels;

- **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	1,317	14	1,332
Retailing	248	266	514
Catering	656	582	1,238
Attractions/entertainment	308	139	446
Transport	111	52	163
Arising from non trip spend	89	0	89
<b>Total Direct</b>	<b>2,730</b>	<b>1,052</b>	<b>3,782</b>

## Torbay – Impacts of Covid-19

Staying visitor measures % change compared to 2019	Trips	Nights	Spend
UK staying visitors	-15%	-1%	-17%
Overseas staying visitors	-84%	-70%	-82%
All staying visitors	-20%	-10%	-25%

Day visitor measures % change compared to 2019	Trips	Spend
Urban day visitors	-21%	-17%
Countryside day visitors	-39%	-35%
Coastal day visitors	-18%	-14%
All day visitors	-20%	-16%

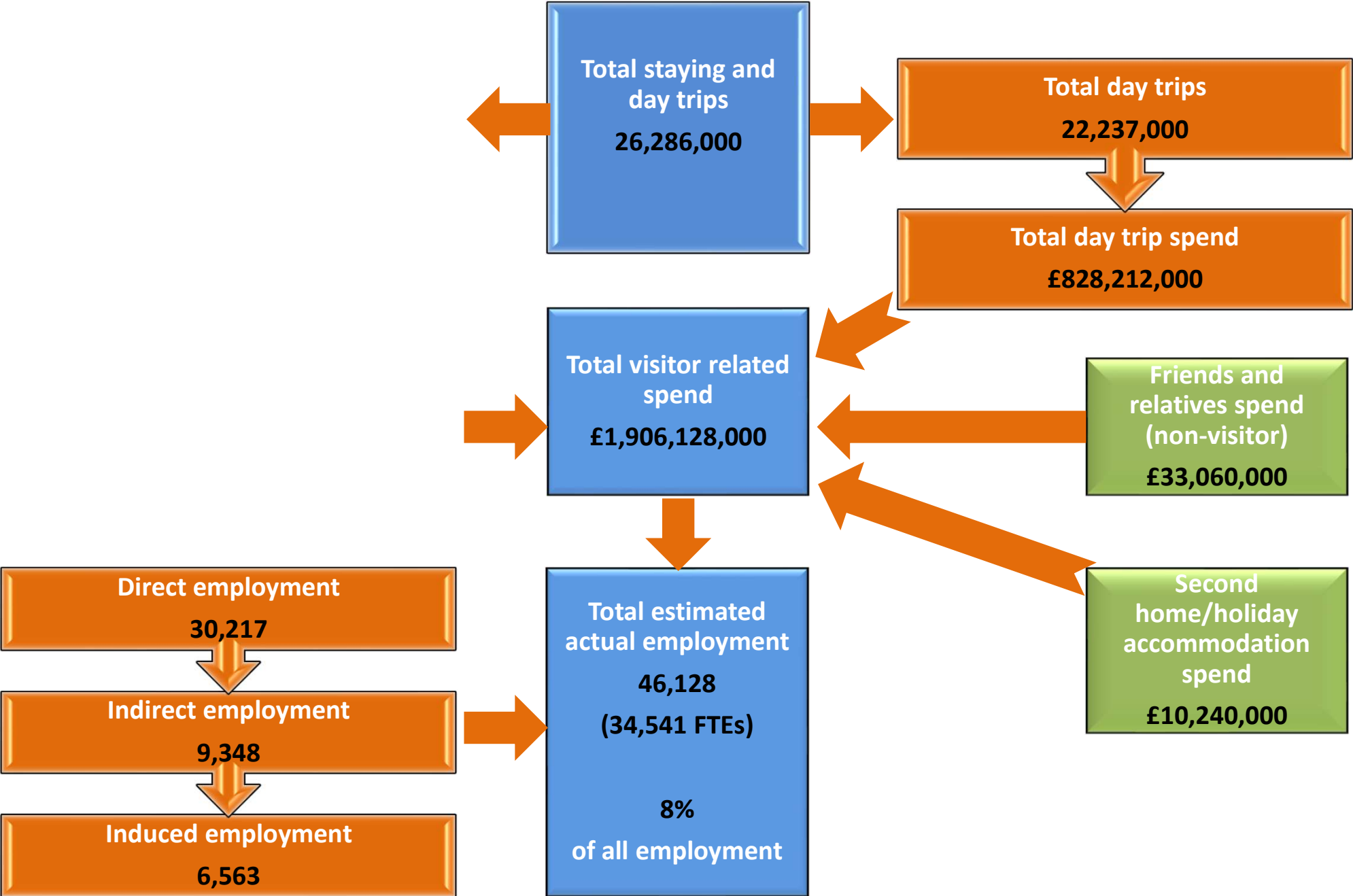
Business turnover change compared to 2019	Staying visitor related	Day visitor related	Total visitor related
Value lost	£99,483,000	£22,646,000	£122,129,000

# Devon 2021





# Devon - Key facts at a glance



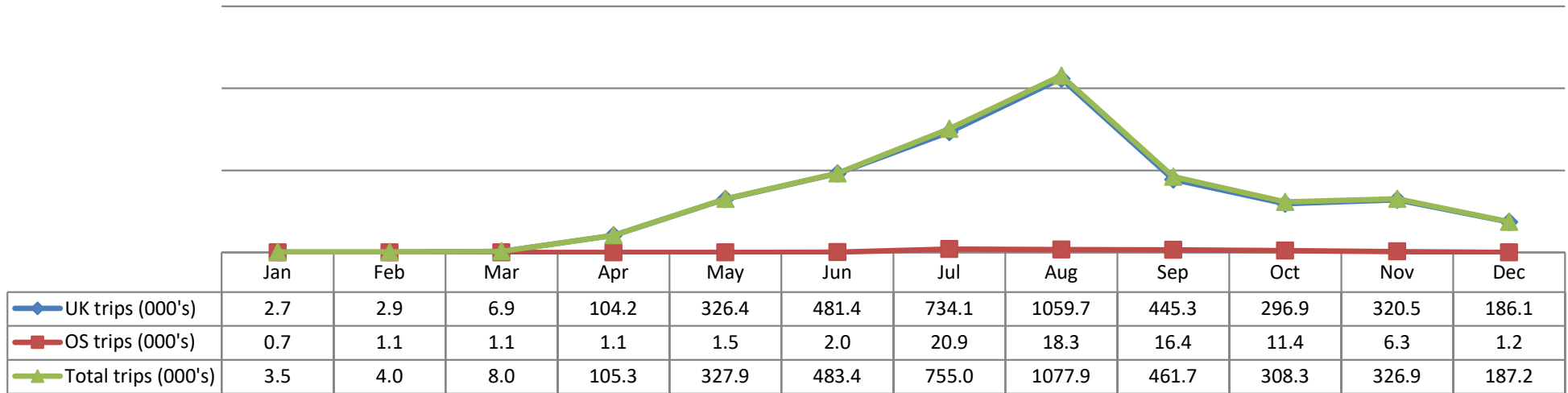
## Devon - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	1,554,000	5,238,000	£390,648,000
Self catering	496,000	3,313,000	£176,128,000
Touring caravans /tents	438,000	2,622,000	£82,074,000
Static vans/holiday centres	730,000	4,520,000	£173,593,000
Group/campus	69,000	270,000	£12,615,000
Paying guest in private homes	0	0	£0
Second homes	77,000	300,000	£14,046,000
Boat moorings	30,000	118,000	£5,517,000
Other	22,000	84,000	£3,925,000
Staying with friends and relatives	762,000	2,960,000	£138,450,000
<b>Total</b>	<b>3,967,000</b>	<b>18,113,000</b>	<b>£996,996,000</b>

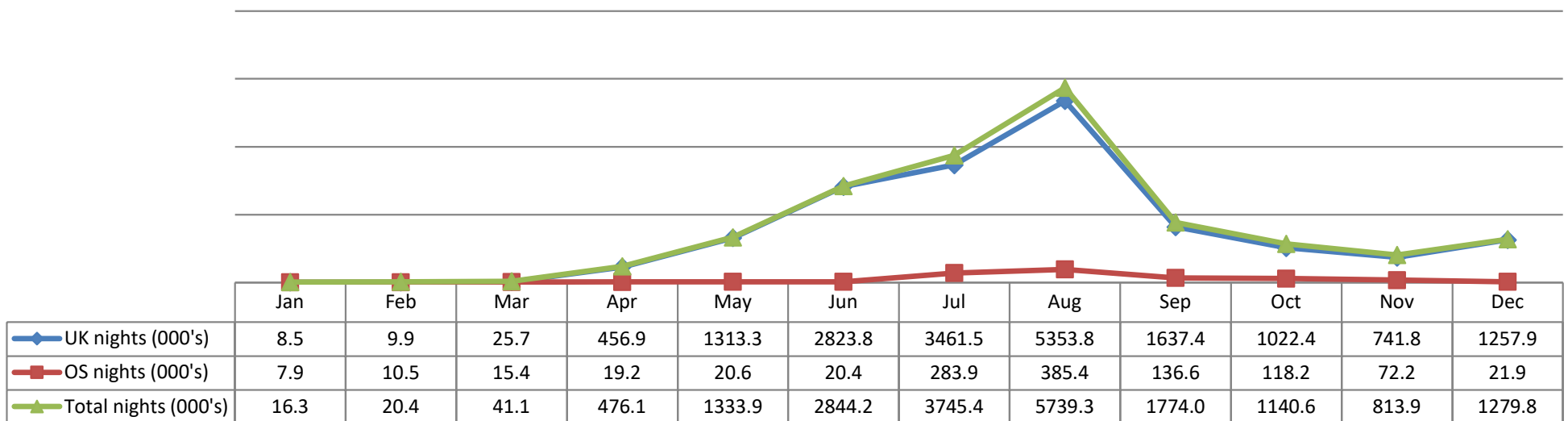
Overseas tourists	Trips	Nights	Spend
Serviced	25,000	145,000	£9,697,000
Self catering	3,000	42,000	£2,091,000
Touring caravans /tents	3,000	30,000	£1,073,000
Static vans/holiday centres	1,000	6,000	£244,000
Group/campus	2,000	127,000	£3,896,000
Paying guest in private homes	1,000	85,000	£2,598,000
Second homes	0	12,000	£408,000
Boat moorings	0	0	£0
Other	2,000	29,000	£1,289,000
Staying with friends and relatives	45,000	636,000	£16,324,000
<b>Total</b>	<b>82,000</b>	<b>1,112,000</b>	<b>£37,620,000</b>

# Devon - Estimated seasonality of staying visits

## Seasonality - trips

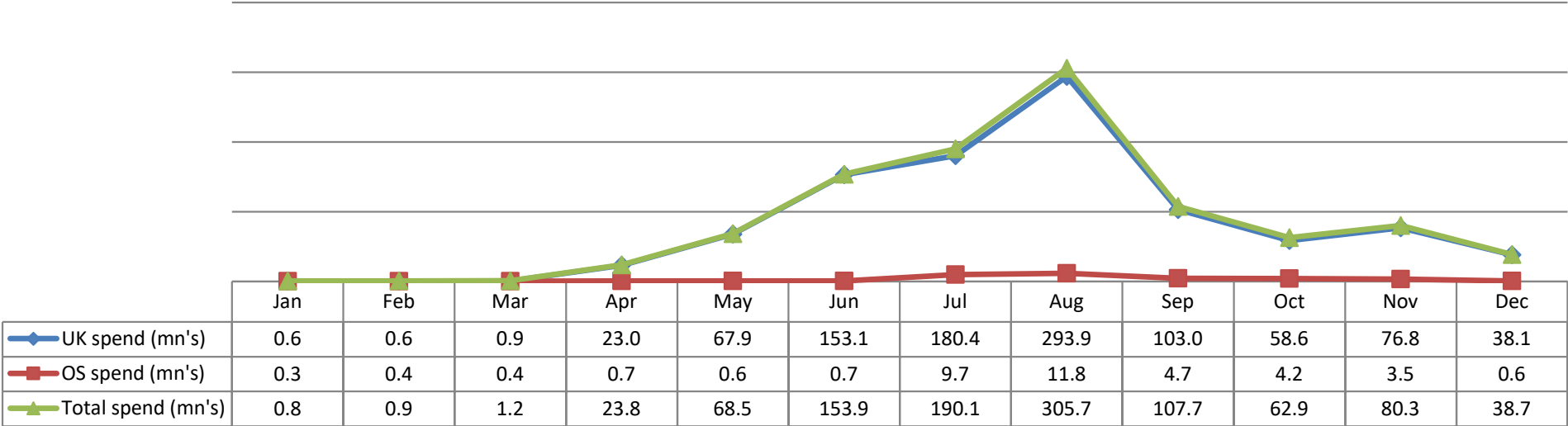


## Seasonality - nights



# Devon - Estimated seasonality of staying visits

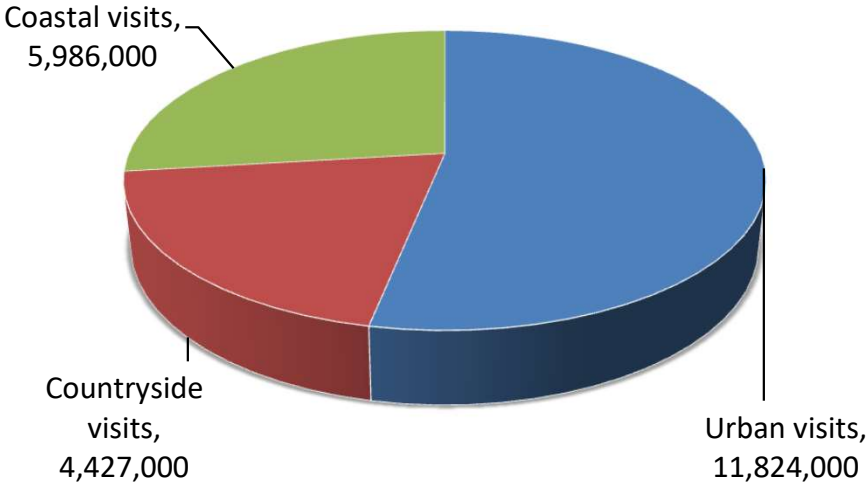
Seasonality - spend



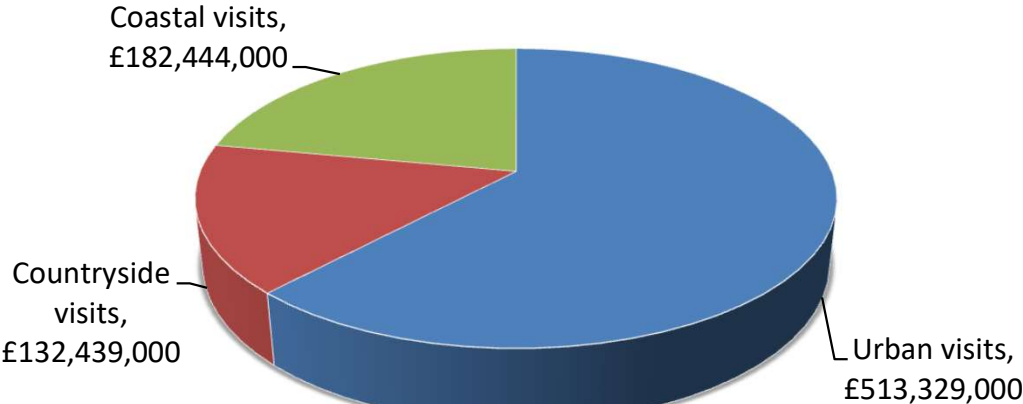
# Devon - Day visits by location

Total day visits	Total day visit spend
22,237,000	£828,212,000

Day visits

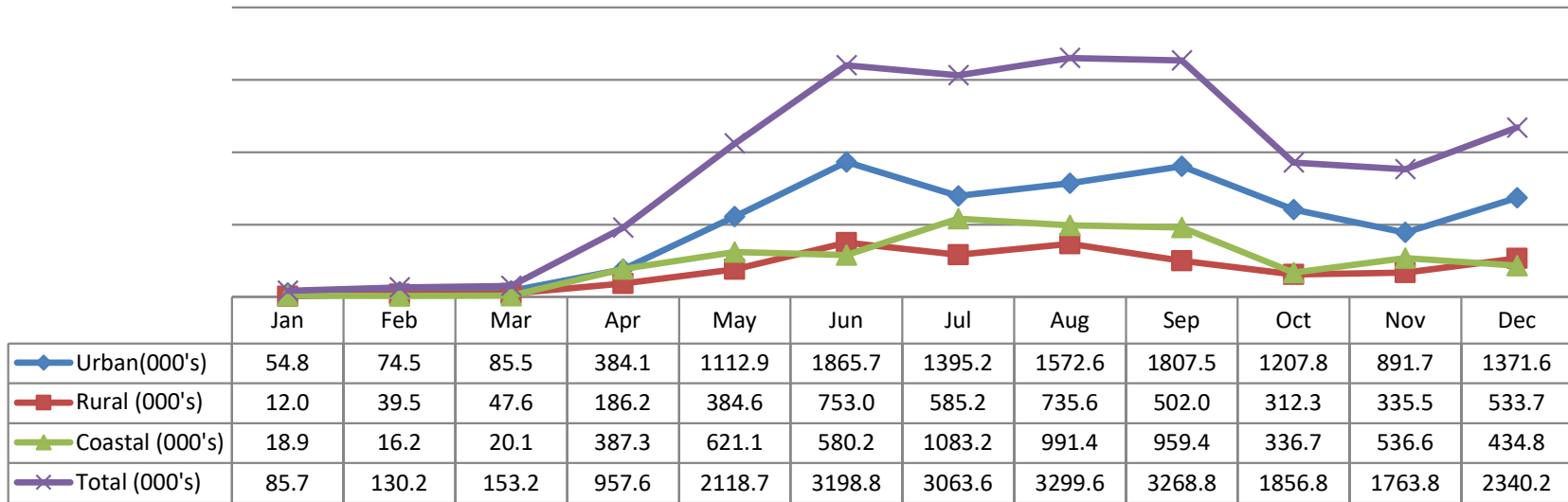


Day visit spend

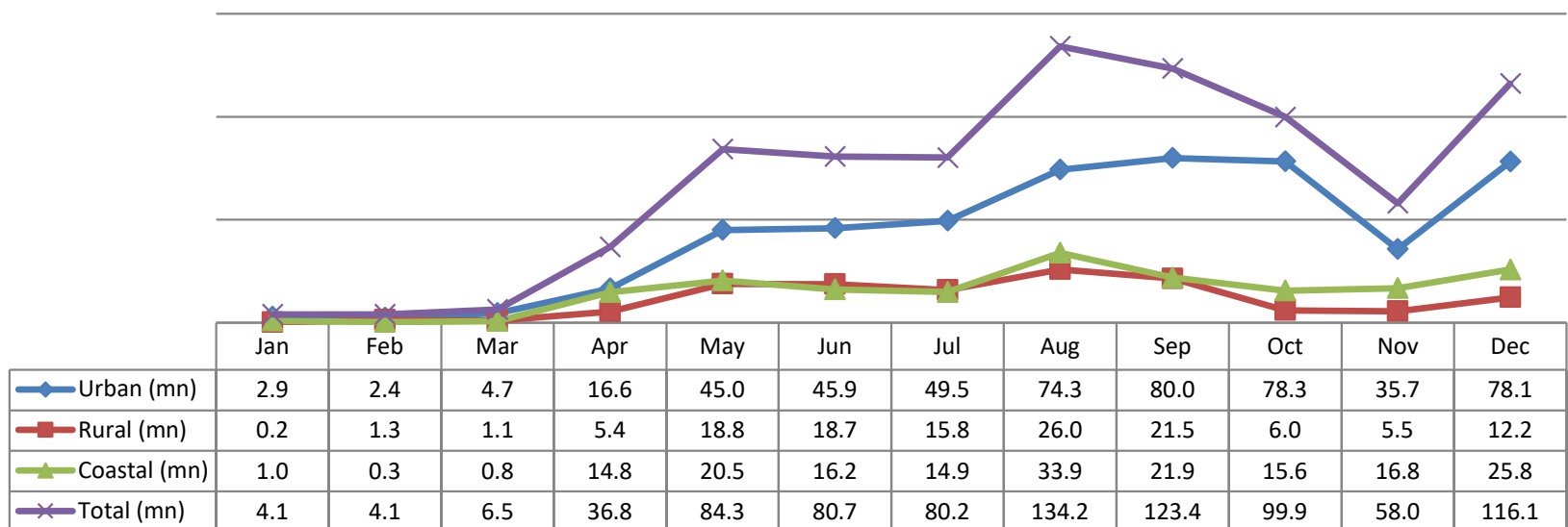


# Devon - Estimated seasonality of day visits

Seasonality - day visits (000's)



Seasonality - day visit spend (millions)



# Devon – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £401,701,000
- Overseas staying visitors £8,740,000

### Totals

**£410,441,000 (22%)**



## Shopping

- UK staying visitors £134,265,000
- Overseas staying visitors £12,164,000
- Day visitors £276,887,000

**£423,316,000 (23%)**



## Food & drink

- UK staying visitors £244,436,000
- Overseas staying visitors £10,047,000
- Day visitors £381,577,000

**£636,060,000 (34%)**



## Attractions/entertainment

- UK staying visitors £82,120,000
- Overseas staying visitors £3,008,000
- Day visitors £69,448,000

**£154,576,000 (8%)**



## Travel

- UK staying visitors £134,475,000
- Overseas staying visitors £3,661,000
- Day visitors £100,302,000

**£238,438,000 (13%)**

## Devon – Other visitor related expenditure by category



Second Homes

£3,890,000



Boats

£6,350,000



Visiting friends and relatives (non-visitor spend)

£33,060,000



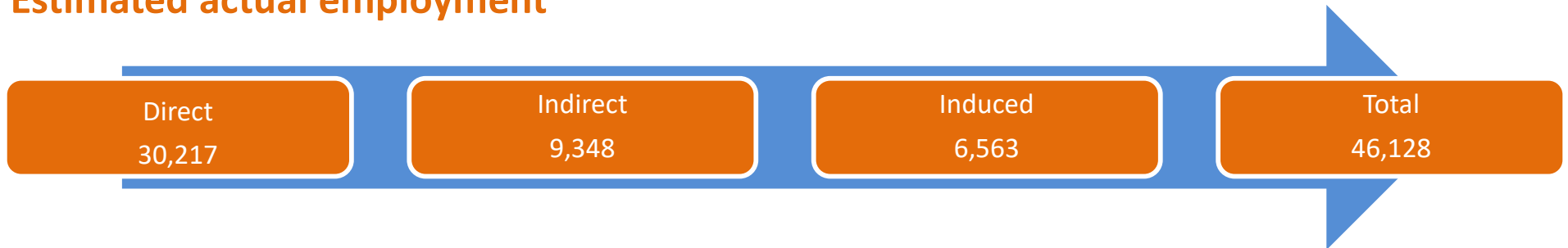
## Devon – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£415,531,000	£7,632,000	£423,163,000
Retailing	£144,964,000	£274,118,000	£419,082,000
Catering	£246,849,000	£370,129,000	£616,978,000
Attractions/entertainment	£89,137,000	£76,033,000	£165,170,000
Transport	£82,881,000	£60,181,000	£143,062,000
Arising from non trip spend	£43,299,536	£0	£43,299,536
<b>Total Direct</b>	<b>£1,022,661,536</b>	<b>£788,093,000</b>	<b>£1,810,754,536</b>

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£1,022,661,536	£788,093,000	£1,810,754,536
Supplier and income induced	£587,225,000	£344,633,000	£931,858,000
<b>Total</b>	<b>£1,609,886,536</b>	<b>£1,132,726,000</b>	<b>£2,742,612,536</b>

# 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	5,866	108	5,974
Retailing	1,120	2,119	3,239
Catering	2,930	4,393	7,323
Attractions/entertainment	1,373	1,171	2,545
Transport	496	360	855
Arising from non trip spend	649	0	649
<b>Total Direct</b>	<b>12,434</b>	<b>8,151</b>	<b>20,584</b>

# Impacts of Covid-19

## 2021 compared to 2019 (pre-pandemic)



## Devon – Impacts on staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	-6%	10%	-19%
Self catering	-6%	11%	-19%
Touring caravans /tents	-24%	-14%	-23%
Static vans/holiday centres	14%	43%	9%
Group/campus	-31%	-4%	-20%
Paying guest in private homes	0%	0%	0%
Second homes	-36%	-50%	-20%
Boat moorings	3%	-14%	-20%
Other	-63%	-20%	-20%
Staying with friends and relatives	-51%	-45%	-20%
<b>Total</b>	<b>-25%</b>	<b>-12%</b>	<b>-16%</b>

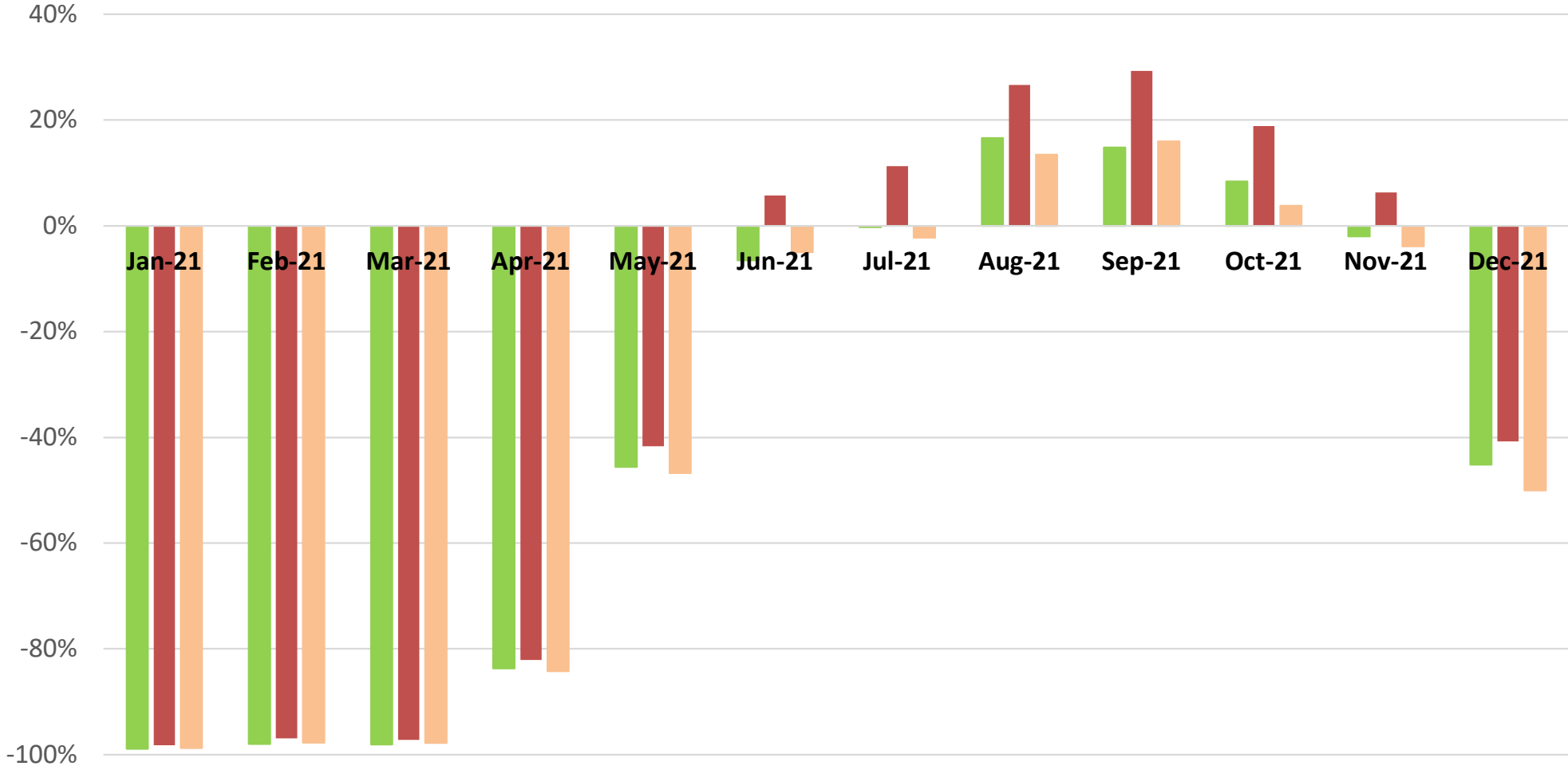
Overseas tourists	Trips	Nights	Spend
Serviced	-87%	-79%	-85%
Self catering	-86%	-79%	-85%
Touring caravans /tents	-88%	-79%	-85%
Static vans/holiday centres	-67%	-65%	-73%
Group/campus	-92%	-73%	-89%
Paying guest in private homes	-94%	-74%	-85%
Second homes	NA	-79%	-88%
Boat moorings	0%	0%	0%
Other	-88%	-68%	-54%
Staying with friends and relatives	-72%	-54%	-68%
<b>Total</b>	<b>-82%</b>	<b>-67%</b>	<b>-81%</b>

## Devon – Impacts on staying visits by accommodation type

All staying visits combined	Trips	Nights	Spend
Serviced	-15%	-1%	-27%
Self catering	-9%	5%	-23%
Touring caravans /tents	-27%	-17%	-27%
Static vans/holiday centres	14%	42%	8%
Group/campus	-43%	-47%	-67%
Paying guest in private homes	-94%	-74%	-85%
Second homes	-37%	-52%	-31%
Boat moorings	3%	-14%	-20%
Other	-68%	-42%	-32%
Staying with friends and relatives	-53%	-47%	-31%
Total	-29%	-19%	-25%

# Devon – Staying visits impacts by month

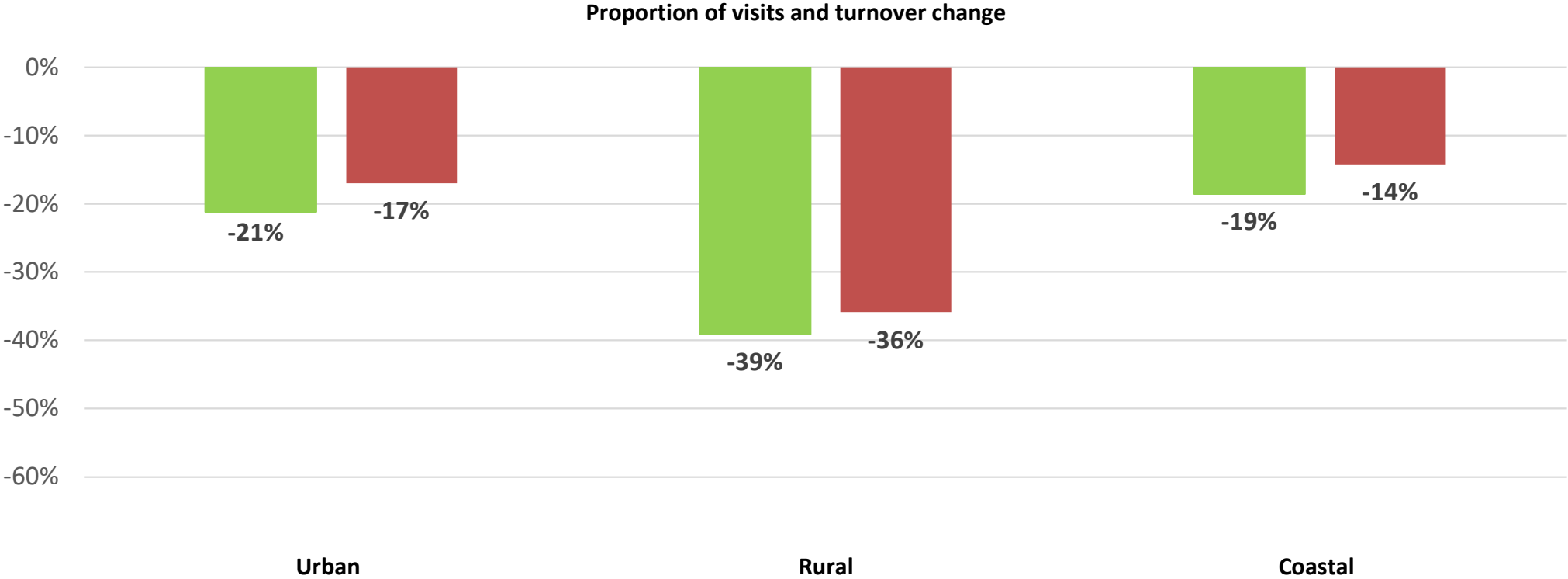
Proportions of staying visitor measures change



	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21
Trips	-99%	-98%	-98%	-84%	-46%	-7%	0%	17%	15%	8%	-2%	-45%
Nights	-98%	-97%	-97%	-82%	-42%	6%	11%	27%	29%	19%	6%	-41%
Spend	-99%	-98%	-98%	-84%	-47%	-5%	-2%	13%	16%	4%	-4%	-50%

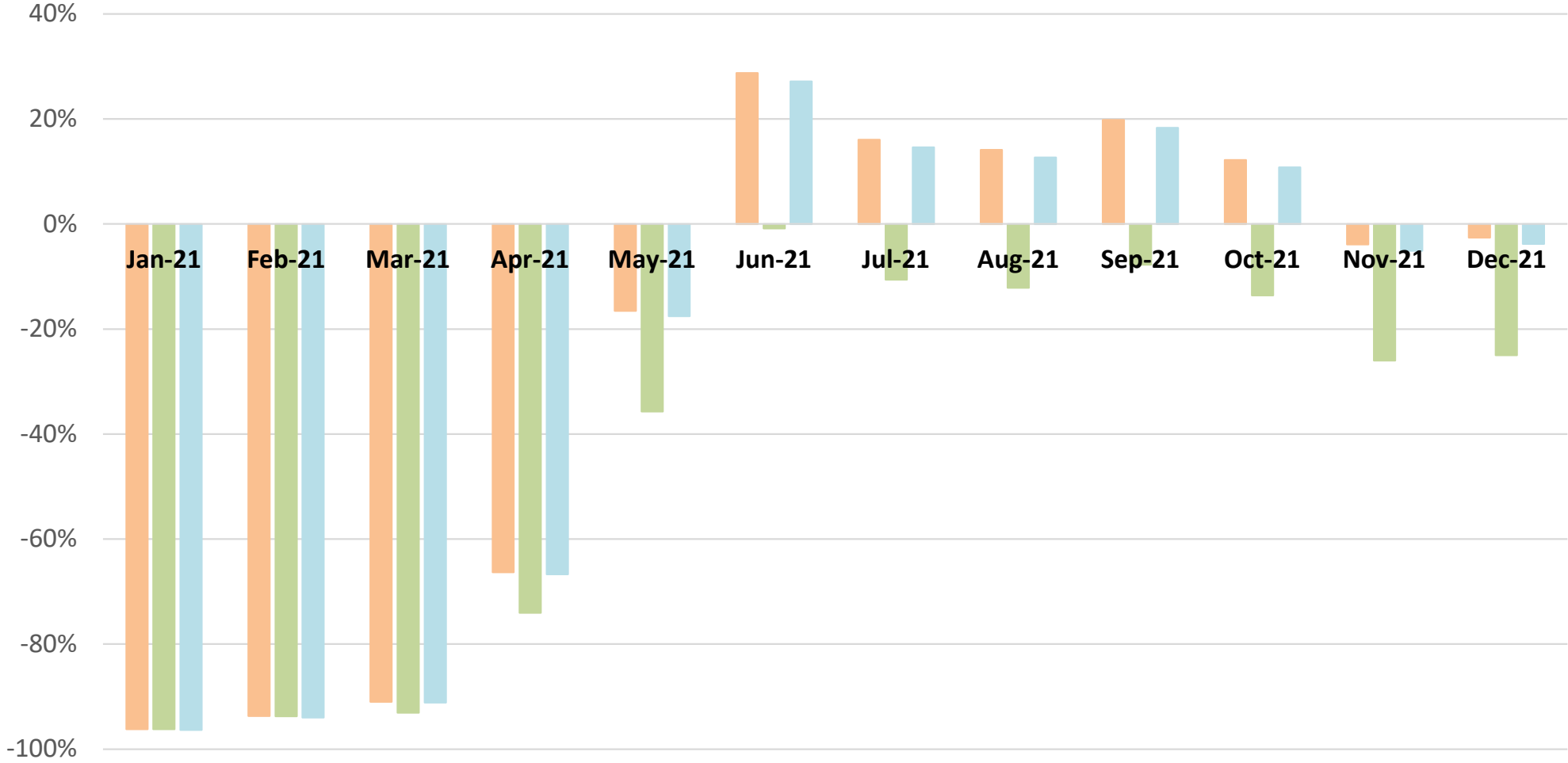
# Devon – Impacts on day visits by location

Total day visits	Total day visit spend
-25%	-20%



# Devon – Day visits volume impacts by month and location type

Proportions of day visits change

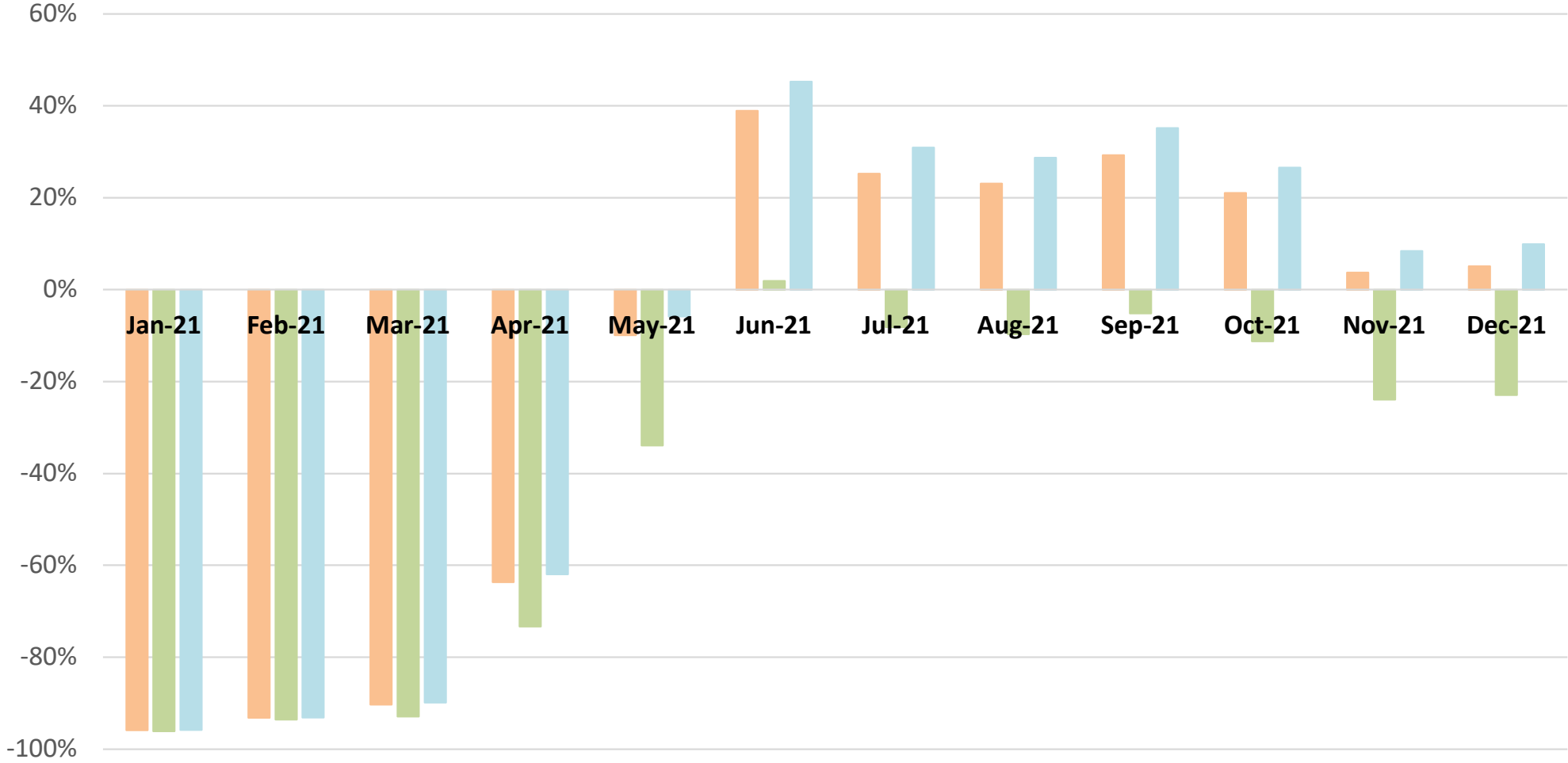


	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21
Urban	-96%	-94%	-91%	-66%	-17%	29%	16%	14%	20%	12%	-4%	-3%
Rural	-96%	-94%	-93%	-74%	-36%	-1%	-11%	-12%	-8%	-14%	-26%	-25%
Coastal	-96%	-94%	-91%	-67%	-18%	27%	15%	13%	18%	11%	-5%	-4%



# Devon – Day visits spend impacts by month and location type

Proportions of day visits spend change



	Jan-21	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21
Urban	-96%	-93%	-90%	-64%	-10%	39%	25%	23%	29%	21%	4%	5%
Rural	-96%	-94%	-93%	-73%	-34%	2%	-8%	-10%	-5%	-11%	-24%	-23%
Coastal	-96%	-93%	-90%	-62%	-6%	45%	31%	29%	35%	27%	8%	10%

## Devon – Impacts on business turnover

Decrease in turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£84,611,000	£1,086,000	£85,697,000
Retailing	£62,930,000	£55,069,000	£117,999,000
Catering	£51,872,000	£52,719,000	£104,591,000
Attractions/entertainment	£67,181,000	£50,878,000	£118,059,000
Transport	£48,468,000	£29,603,000	£78,071,000
Arising from non trip spend	£34,678,464	£0	£34,678,464
<b>Total Direct</b>	<b>£349,740,464</b>	<b>£189,355,000</b>	<b>£539,095,464</b>

Decrease in total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£349,740,464	£189,355,000	£539,095,464
Supplier and income induced	£161,589,000	£76,415,000	£238,004,000
<b>Total</b>	<b>£511,329,464</b>	<b>£265,770,000</b>	<b>£777,099,464</b>