

# The Economic Impact of the Torbay Visitor Economy 2022



Produced on behalf of the English Riviera BID Company  
By  
The South West Research Company Ltd



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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 and districts in 2022.

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 2022, including key facts about the economy, weather and key events please see Appendix 2 of this report.

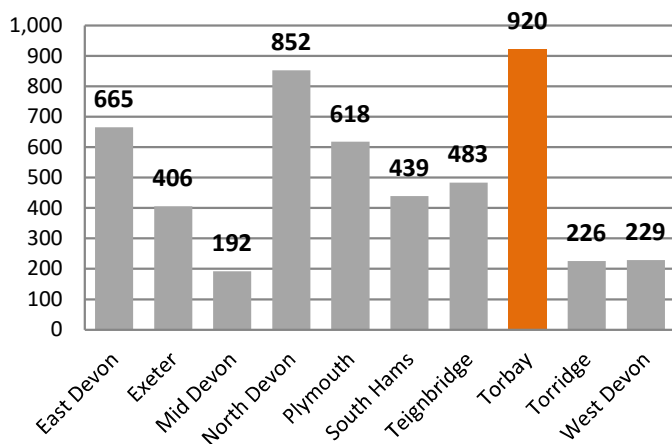
# Value of Tourism 2022

## Torbay

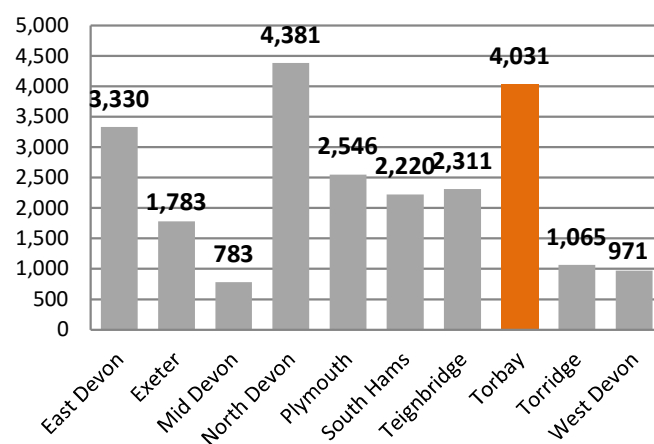
Key Facts	
920,300	Staying visitor trips
4,030,900	Staying visitor nights
£280,246,000	Staying visitor spend
3,039,000	Day visits
£120,498,000	Day visitor spend
£400,744,000	Direct visitor spend
£11,189,000	Other related spend
£411,933,000	TOTAL VISITOR RELATED SPEND
9,102	Estimated actual employment
6,700	FTE employment
15%	Proportion of all employment

# Torbay - Staying visits in the county context

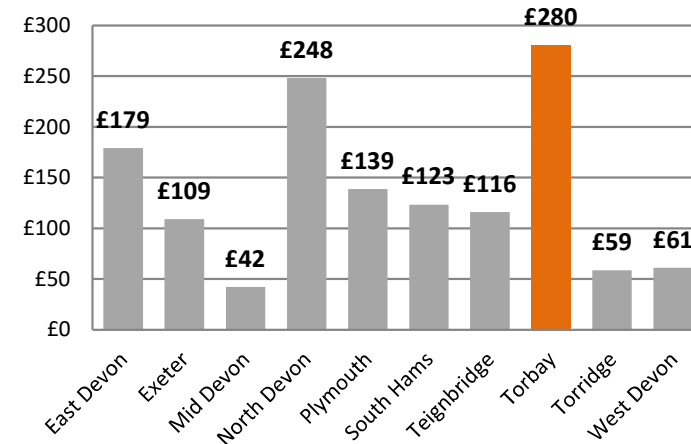
All staying trips (000's)



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	632	33	3,068	262	£164	£15
Exeter	368	38	1,324	459	£81	£28
Mid-Devon	177	15	678	105	£36	£6
North Devon	811	41	4,113	268	£230	£18
Plymouth	564	54	2,016	530	£108	£30
South Hams	413	26	2,016	204	£111	£12
Teignbridge	456	27	2,122	189	£106	£10
<b>Torbay</b>	<b>858</b>	<b>62</b>	<b>3,635</b>	<b>396</b>	<b>£251</b>	<b>£30</b>
Torrige	211	15	956	109	£52	£6
West Devon	212	17	858	113	£53	£8

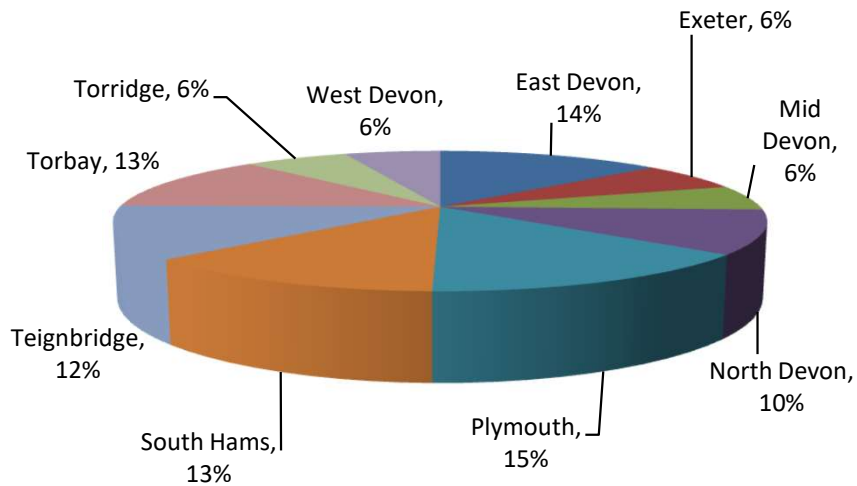
## Torbay - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	407,000	1,336,000	£135,389,000
Self catering	88,000	572,000	£41,302,000
Touring caravans /tents	33,000	194,000	£7,759,000
Static vans/holiday centres	137,000	827,000	£43,173,000
Group/campus	1,000	3,000	£152,000
Paying guest in private homes	0	0	£0
Second homes	15,000	75,000	£2,178,000
Boat moorings	8,000	36,000	£1,816,000
Other	6,000	11,000	£519,000
Staying with friends and relatives	163,000	580,000	£18,312,000
<b>Total</b>	<b>858,000</b>	<b>3,635,000</b>	<b>£250,599,000</b>

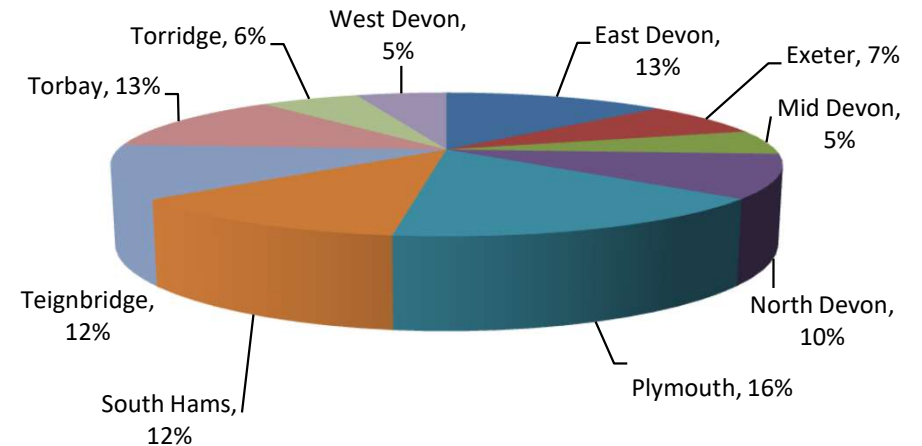
Overseas tourists	Trips	Nights	Spend
Serviced	37,400	141,000	£17,142,000
Self catering	3,900	40,400	£2,812,000
Touring caravans /tents	1,200	6,300	£328,000
Static vans/holiday centres	800	5,100	£339,000
Group/campus	200	4,500	£286,000
Paying guest in private homes	2,300	59,800	£3,180,000
Second homes	500	6,900	£318,000
Boat moorings	0	0	£0
Other	1,200	3,300	£85,000
Staying with friends and relatives	14,800	128,700	£5,157,000
<b>Total</b>	<b>62,300</b>	<b>395,900</b>	<b>£29,647,000</b>

# Torbay - Day visits in the county context

All day visits



All day visit spend

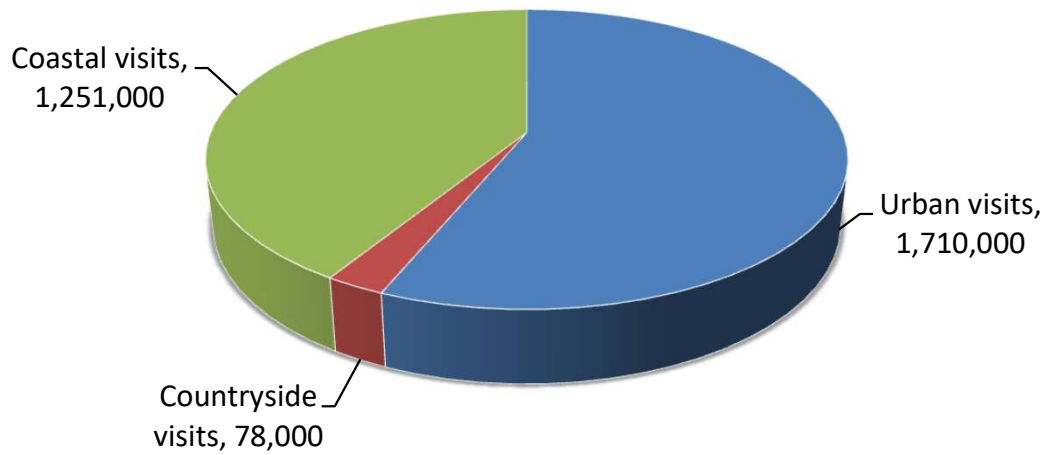


Area	Day visits (mn)	Day visit spend (£mn)
East Devon	3.2	£123.0
Exeter	1.5	£70.5
Mid-Devon	1.4	£51.3
North Devon	2.4	£92.1
Plymouth	3.5	£153.4
South Hams	3.1	£113.6
Teignbridge	2.9	£112.1
Torbay	3.0	£120.5
Torrige	1.5	£54.8
West Devon	1.4	£50.1

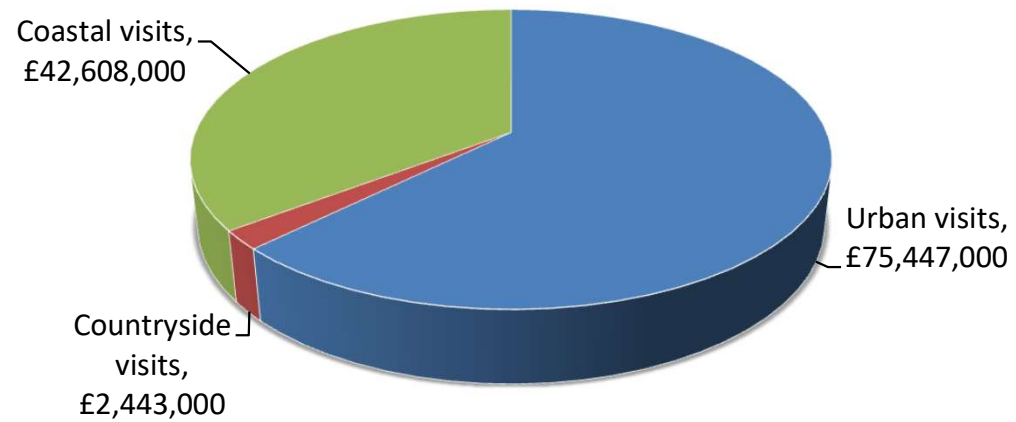
# Torbay - Day visits by location

Total day visits	Total day visit spend
3,039,000	£120,498,000

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 £89,505,000
- Overseas staying visitors £7,816,000

## Totals

**£97,321,000 (24%)**



## Shopping

- UK staying visitors £35,355,000
- Overseas staying visitors £9,586,000
- Day visitors £40,472,000

**£85,413,000 (21%)**



## Food & drink

- UK staying visitors £50,269,000
- Overseas staying visitors £5,938,000
- Day visitors £46,147,000

**£102,354,000 (26%)**



## Attractions/entertainment

- UK staying visitors £24,769,000
- Overseas staying visitors £2,844,000
- Day visitors £11,000,000

**£38,613,000 (10%)**



## Travel

- UK staying visitors £50,701,000
- Overseas staying visitors £3,462,000
- Day visitors £22,881,000

**£77,044,000 (19%)**

## Torbay – Other visitor related expenditure by category



Second Homes  
£1,048,000



Boats  
£2,409,000



Visiting friends and relatives (non-visitor spend)  
£7,732,000

- 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.

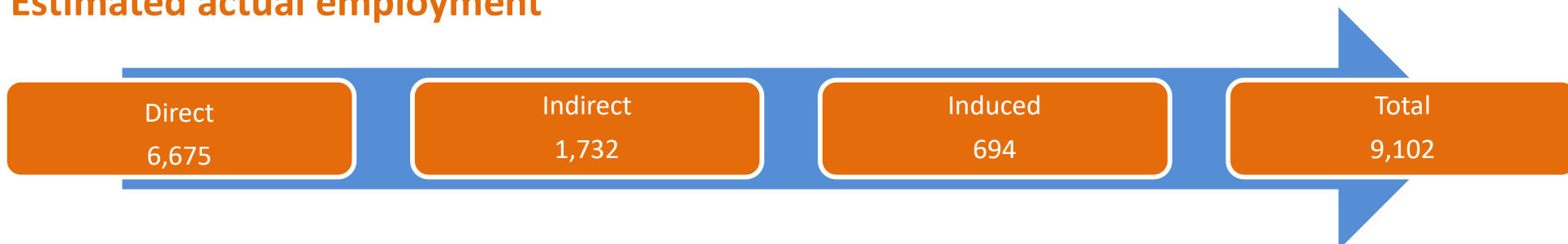
This section of the report looks at employment on three levels;

- **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)

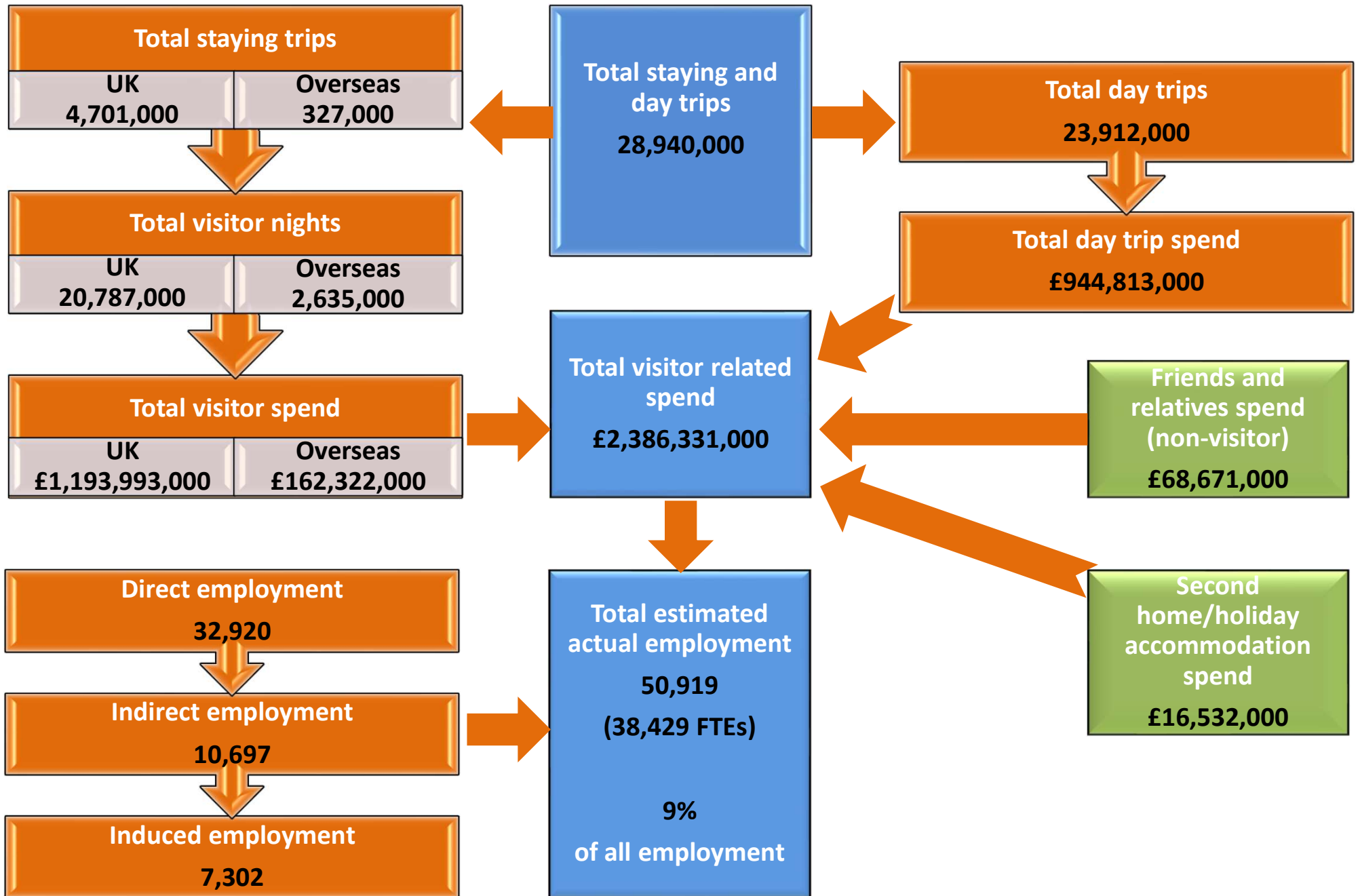


Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	1,377	13	1,390
Retailing	359	323	682
Catering	709	582	1,292
Attractions/entertainment	521	216	737
Transport	213	90	304
Arising from non trip spend	168	0	168
<b>Total Direct</b>	<b>3,347</b>	<b>1,224</b>	<b>4,571</b>

# Devon 2022



# Devon - Key facts at a glance



## Devon - Staying visits by accommodation type

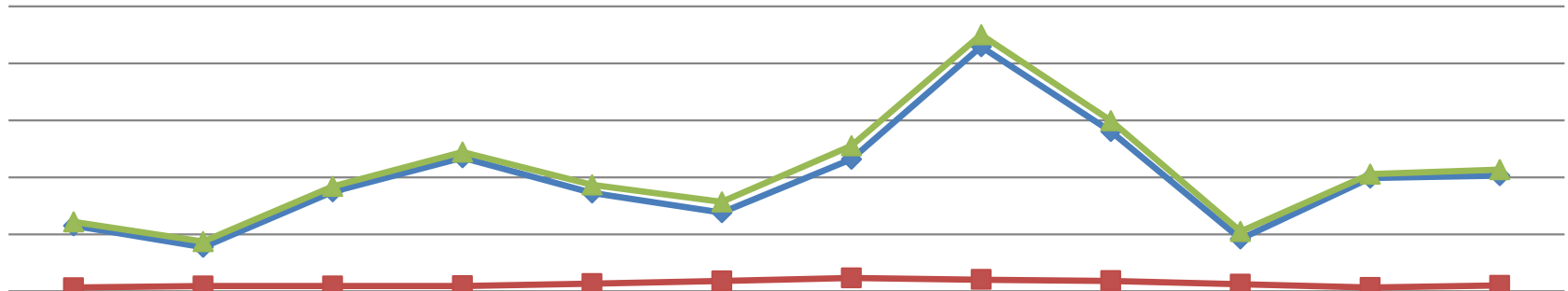
Domestic tourists	Trips	Nights	Spend
Serviced	1,253,000	4,112,000	£416,652,000
Self catering	470,000	3,056,000	£220,728,000
Touring caravans /tents	484,000	2,825,000	£112,864,000
Static vans/holiday centres	758,000	4,575,000	£238,716,000
Group/campus	93,000	266,000	£14,818,000
Paying guest in private homes	0	0	£0
Second homes	111,000	571,000	£16,498,000
Boat moorings	27,000	130,000	£6,481,000
Other	55,000	100,000	£4,610,000
Staying with friends and relatives	1,450,000	5,152,000	£162,626,000
<b>Total</b>	<b>4,701,000</b>	<b>20,787,000</b>	<b>£1,193,993,000</b>

Overseas tourists	Trips	Nights	Spend
Serviced	115,000	434,000	£52,752,000
Self catering	21,000	216,000	£15,030,000
Touring caravans /tents	18,000	91,000	£4,769,000
Static vans/holiday centres	4,000	29,000	£1,956,000
Group/campus	15,000	435,000	£27,896,000
Paying guest in private homes	8,000	206,000	£10,953,000
Second homes	4,000	52,000	£2,411,000
Boat moorings	0	0	£0
Other	11,000	29,000	£751,000
Staying with friends and relatives	131,000	1,143,000	£45,804,000
<b>Total</b>	<b>327,000</b>	<b>2,635,000</b>	<b>£162,322,000</b>



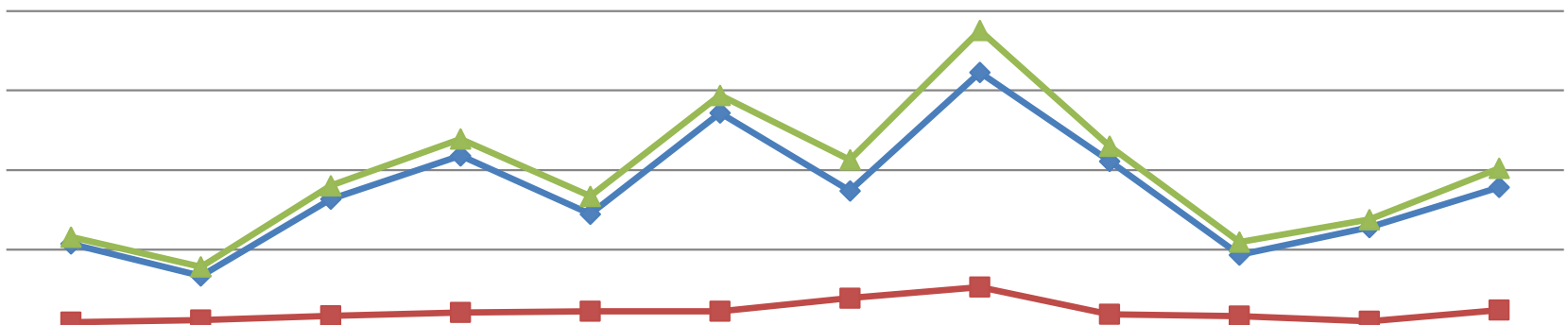
# Devon - Estimated seasonality of staying visits

## Seasonality - trips



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK trips (000's)	230.4	155.3	349.8	469.5	346.2	277.0	463.7	859.0	561.1	184.9	397.8	406.2
OS trips (000's)	13.6	19.5	19.3	19.9	27.9	37.3	47.9	41.9	37.7	26.1	14.5	21.6
Total trips (000's)	244.0	174.8	369.1	489.4	374.1	314.3	511.7	900.9	598.8	211.1	412.2	427.7

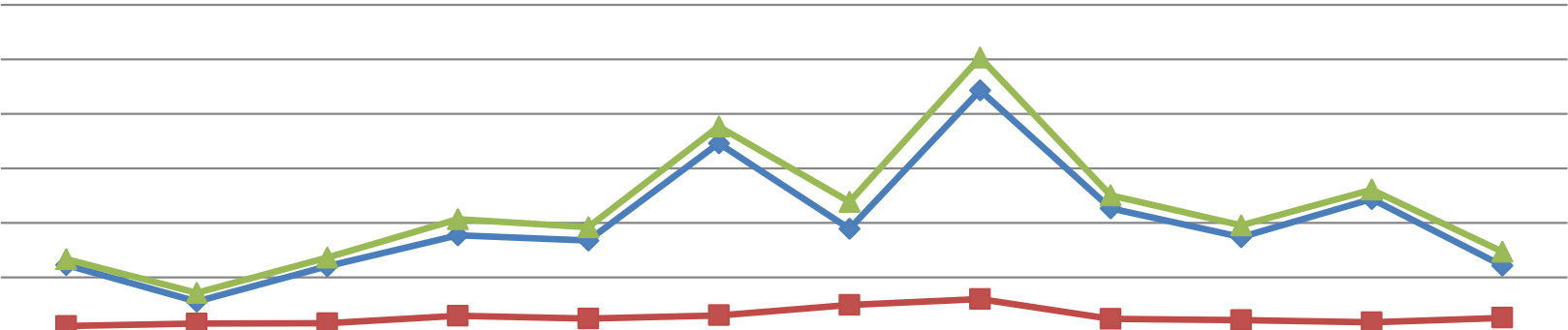
## Seasonality - nights



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK nights (000's)	1071.6	670.0	1634.5	2179.0	1445.7	2717.0	1738.5	3226.3	2111.3	933.1	1278.5	1781.7
OS nights (000's)	86.0	114.4	168.5	210.4	225.2	223.1	389.8	529.3	187.6	162.3	99.1	239.3
Total nights (000's)	1157.6	784.4	1802.9	2389.4	1670.9	2940.1	2128.4	3755.6	2298.9	1095.3	1377.6	2021.0

# Devon - Estimated seasonality of staying visits

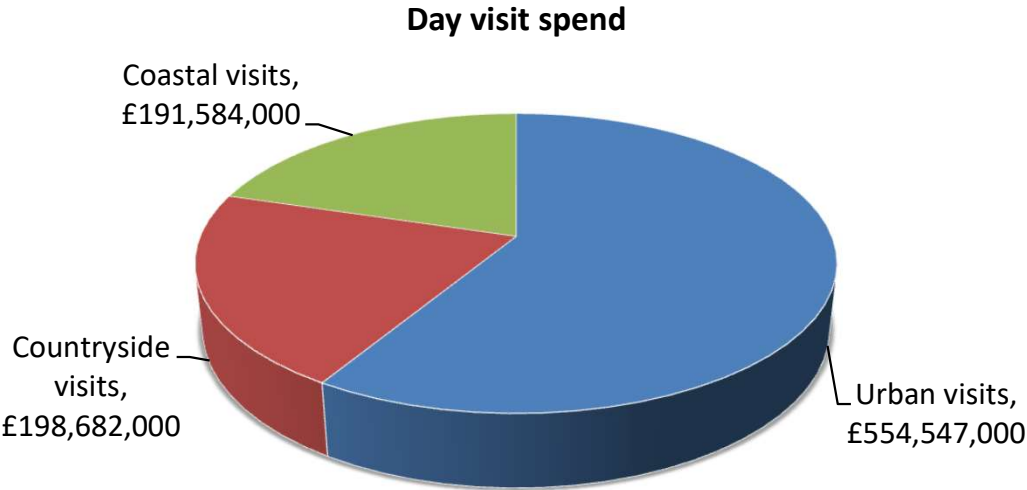
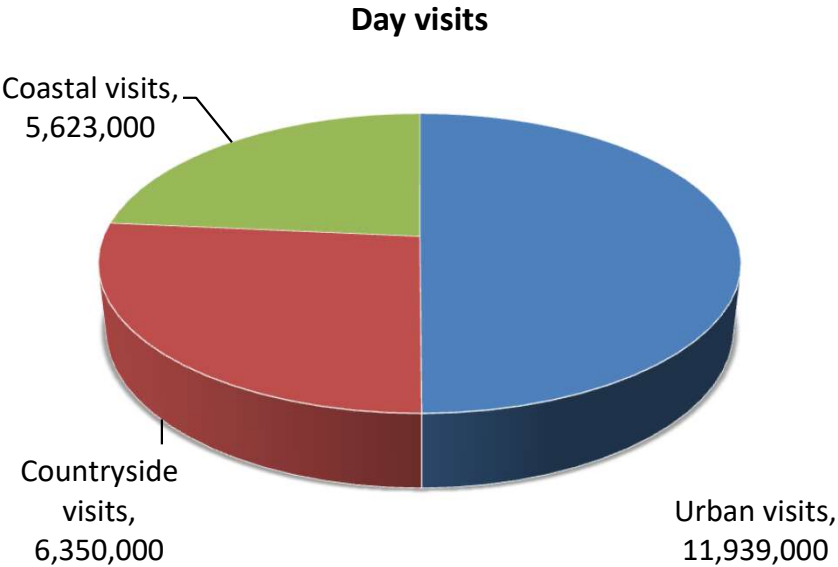
Seasonality - spend



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK spend (mn's)	61.4	27.8	60.1	88.7	83.8	173.0	94.7	221.7	113.3	87.0	121.7	60.7
OS spend (mn's)	5.4	7.8	7.9	14.7	12.3	15.2	24.6	30.0	11.9	10.7	8.8	12.9
Total spend (mn's)	66.8	35.6	68.1	103.4	96.1	188.2	119.3	251.7	125.2	97.7	130.5	73.6

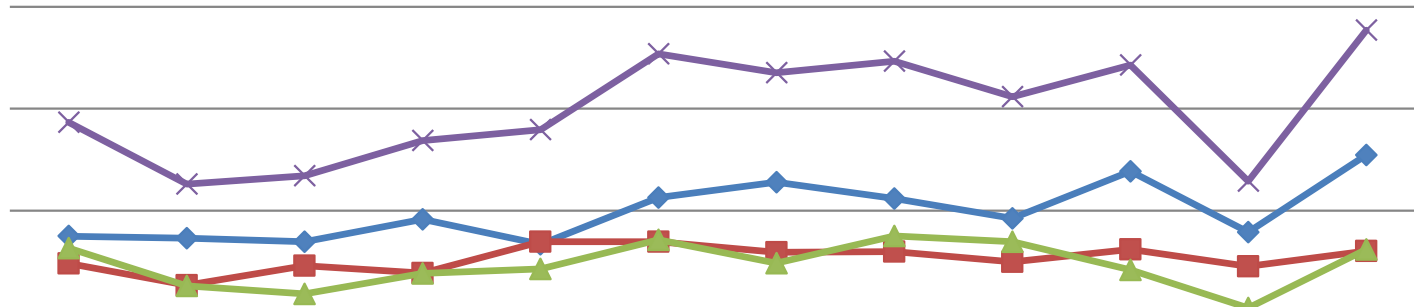
# Devon - Day visits by location

Total day visits	Total day visit spend
23,912,000	£944,813,000



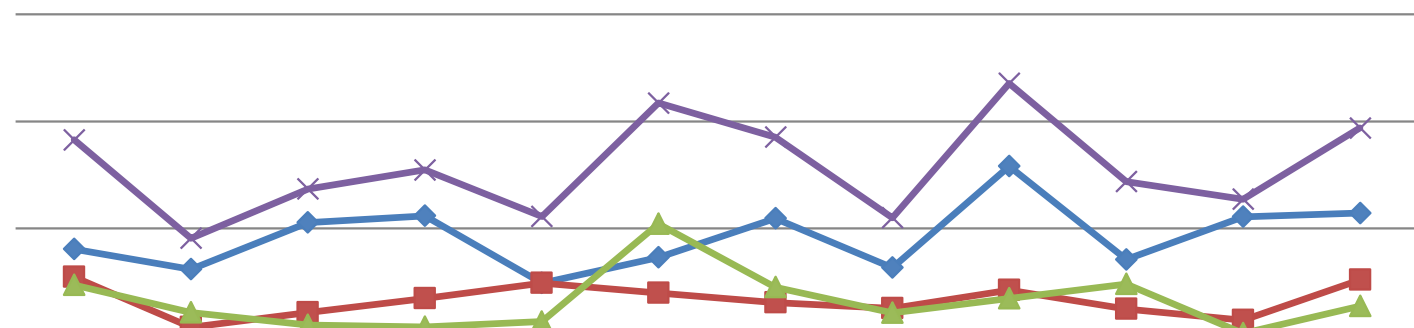
# Devon - Estimated seasonality of day visits

## Seasonality - day visits (000's)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban(000's)	750.5	729.6	695.6	916.4	670.7	1128.5	1278.9	1118.4	926.0	1386.9	790.6	1546.9
Rural (000's)	482.8	267.7	461.3	386.5	694.8	695.2	590.9	597.7	496.3	620.0	452.5	604.2
Coastal (000's)	632.3	263.2	184.4	383.4	427.6	714.3	484.1	751.2	695.2	420.6	46.4	620.3
Total (000's)	1865.5	1260.5	1341.4	1686.3	1793.1	2537.9	2353.9	2467.4	2117.6	2427.5	1289.5	2771.3

## Seasonality - day visit spend (millions)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban (mn)	40.4	30.9	52.8	55.9	24.5	36.4	54.7	31.7	79.1	35.5	55.4	57.1
Rural (mn)	27.4	3.8	10.7	17.3	24.6	19.9	15.4	12.7	21.3	12.4	7.1	26.0
Coastal (mn)	23.7	10.7	4.9	4.1	6.5	52.2	22.5	10.6	17.4	24.0	1.1	13.7
Total (mn)	91.4	45.5	68.4	77.3	55.6	108.5	92.7	55.0	117.7	71.9	63.7	96.9

# Devon – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £426,449,000
- Overseas staying visitors £42,794,000

## Totals

**£469,243,000 (20%)**



## Shopping

- UK staying visitors £168,451,000
- Overseas staying visitors £52,485,000
- Day visitors £324,323,000

**£545,259,000 (24%)**



## Food & drink

- UK staying visitors £239,510,000
- Overseas staying visitors £32,514,000
- Day visitors £357,962,000

**£629,986,000 (27%)**



## Attractions/entertainment

- UK staying visitors £118,015,000
- Overseas staying visitors £15,574,000
- Day visitors £98,511,000

**£232,100,000 (10%)**



## Travel

- UK staying visitors £241,568,000
- Overseas staying visitors £18,956,000
- Day visitors £164,016,000

**£424,540,000 (18%)**

## Devon – Other visitor related expenditure by category



Second Homes

£7,937,000



Boats

£8,595,000



Visiting friends and relatives (non-visitor spend)

£68,671,000

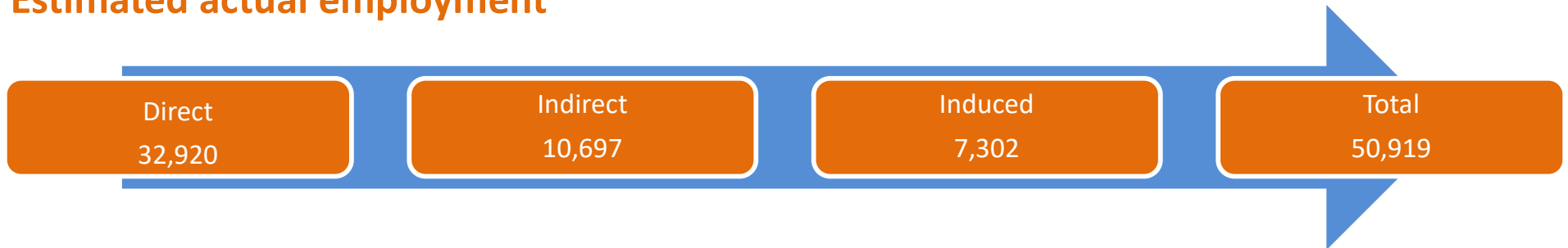
## Devon – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£474,683,000	£7,159,000	£481,842,000
Retailing	£218,727,000	£321,079,000	£539,806,000
Catering	£263,863,000	£347,224,000	£611,087,000
Attractions/entertainment	£138,518,000	£105,334,000	£243,852,000
Transport	£156,314,000	£98,410,000	£254,724,000
Arising from non trip spend	£85,203,400	£0	£85,203,400
<b>Total Direct</b>	<b>£1,337,308,400</b>	<b>£879,206,000</b>	<b>£2,216,514,400</b>

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£1,337,308,400	£879,206,000	£2,216,514,400
Supplier and income induced	£697,912,000	£356,236,000	£1,054,148,000
<b>Total</b>	<b>£2,035,220,400</b>	<b>£1,235,442,000</b>	<b>£3,270,662,400</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	5,640	85	5,725
Retailing	1,497	2,198	3,696
Catering	2,916	3,838	6,754
Attractions/entertainment	2,141	1,628	3,770
Transport	872	549	1,421
Arising from non trip spend	1,276	0	1,276
<b>Total Direct</b>	<b>14,343</b>	<b>8,298</b>	<b>22,641</b>