

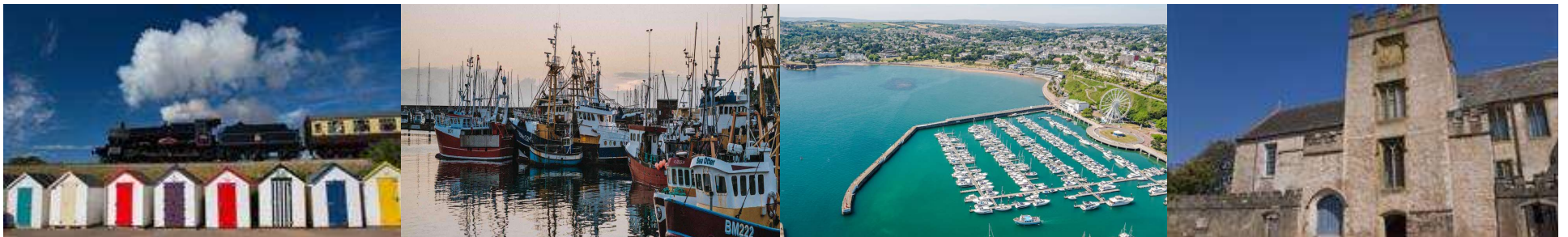
# The Economic Impact of the Torbay Visitor Economy 2020



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



September 2021



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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 2020. 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 2020, 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 2020 and as a result our approach to the project 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 2020 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 2020 input data. Once the input data was calculated the Cambridge Model was then used to produce the outputs for 2020 and as such, they are comparable with previous years whilst noting the changes above.

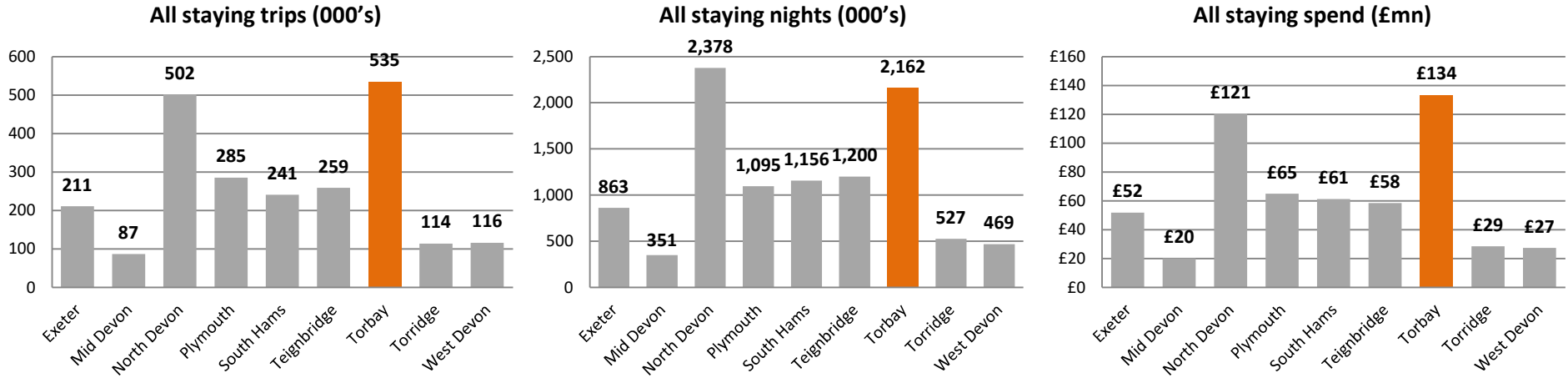
Employment figures show a large decrease compared to the 2019 data. However, many more tourism jobs will have been supported by Government support schemes in place in 2020 due to the pandemic e.g. furlough scheme. So the 2020 figure is an estimate of jobs supported by the 2020 visitor spend rather than an actual change in the employment numbers when compared to previous years.

# Value of Tourism 2020

## Torbay

Key Facts	
535,100	Staying visitor trips
2,161,600	Staying visitor nights
£133,608,000	Staying visitor spend
1,705,000	Day visits
£61,496,000	Day visitor spend
£195,104,000	Direct visitor spend
£3,603,134	Other related spend
£198,707,134	TOTAL VISITOR RELATED SPEND
4,659	Estimated actual employment
3,428	FTE employment
8%	Proportion of all employment

# Torbay - Staying visits in the county context



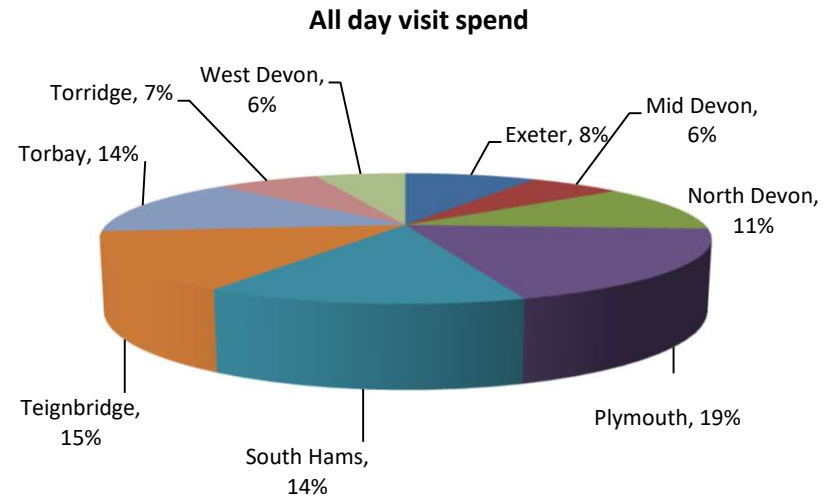
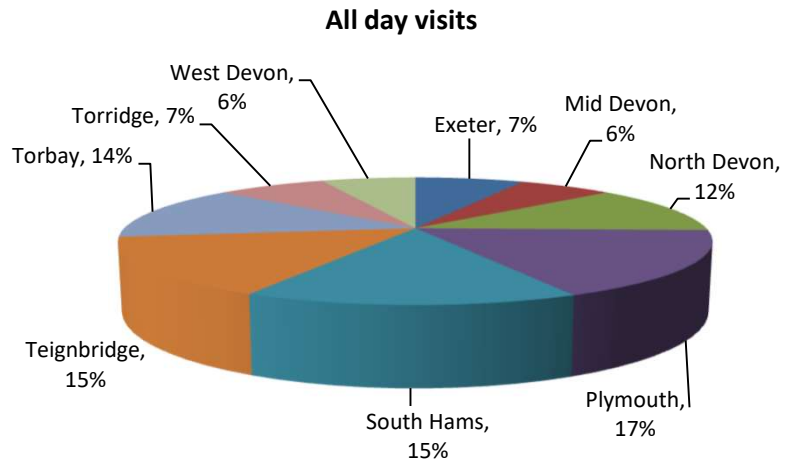
Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Exeter	191	20	690	173	£44	£7
Mid-Devon	83	4	322	29	£19	£1
North Devon	490	12	2,289	89	£116	£4
Plymouth	265	20	926	169	£58	£7
South Hams	233	8	1,092	64	£58	£3
Teignbridge	252	7	1,145	55	£56	£2
<b>Torbay</b>	<b>515</b>	<b>20</b>	<b>2,026</b>	<b>136</b>	<b>£127</b>	<b>£7</b>
Torridge	110	4	496	31	£27	£1
West Devon	111	5	433	36	£26	£2

## Torbay - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	278,000	817,000	£68,045,000
Self catering	67,000	387,000	£22,964,000
Touring caravans /tents	20,000	105,000	£3,657,000
Static vans/holiday centres	86,000	463,000	£19,866,000
Group/campus	0	2,000	£85,000
Paying guest in private homes	0	0	£0
Second homes	5,000	20,000	£964,000
Boat moorings	5,000	21,000	£1,016,000
Other	1,000	6,000	£276,000
Staying with friends and relatives	52,000	206,000	£9,746,000
<b>Total</b>	<b>515,000</b>	<b>2,026,000</b>	<b>£126,619,000</b>

Overseas tourists	Trips	Nights	Spend
Serviced	12,300	57,900	£3,779,000
Self catering	1,000	12,600	£616,000
Touring caravans /tents	400	2,900	£101,000
Static vans/holiday centres	100	1,000	£46,000
Group/campus	200	1,900	£77,000
Paying guest in private homes	2,600	26,100	£1,044,000
Second homes	200	1,900	£77,000
Boat moorings	0	0	£0
Other	200	1,600	£66,000
Staying with friends and relatives	3,100	29,600	£1,183,000
<b>Total</b>	<b>20,100</b>	<b>135,600</b>	<b>£6,989,000</b>

# Torbay - Day visits in the county context



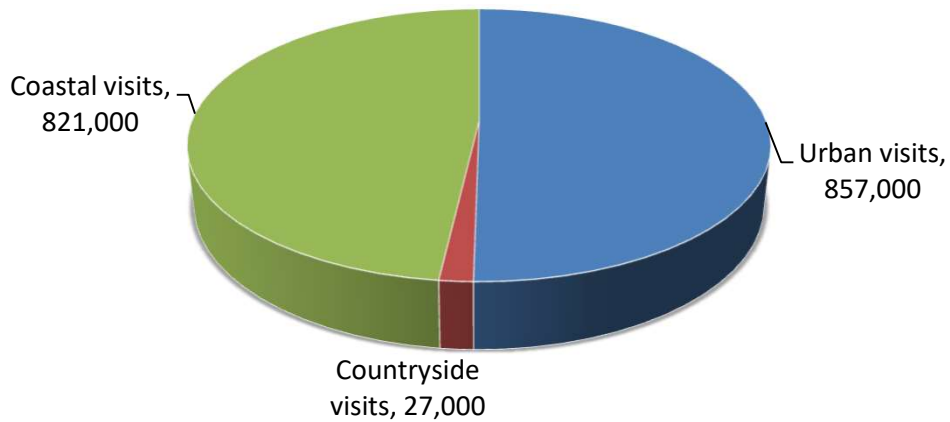
Area	Day visits (mn)	Day visit spend (£mn)
Exeter	0.9	£37.2
Mid-Devon	0.8	£26.5
North Devon	1.5	£50.3
Plymouth	2.1	£83.0
South Hams	1.9	£61.5
Teignbridge	1.9	£64.2
Torbay	1.7	£61.5
Torrige	0.9	£29.6
West Devon	0.8	£25.6



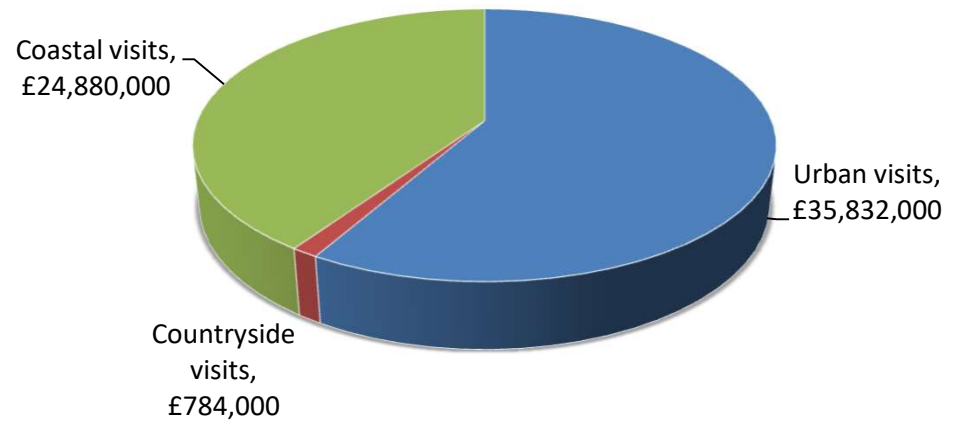
# Torbay - Day visits by location

Total day visits	Total day visit spend
1,705,000	£61,496,000

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 £48,902,000
- Overseas staying visitors £2,035,000

### Totals

**£50,937,000 (26%)**



### Shopping

- UK staying visitors £16,240,000
- Overseas staying visitors £2,055,000
- Day visitors £19,347,000

**£37,642,000 (19%)**



### Food & drink

- UK staying visitors £28,221,000
- Overseas staying visitors £1,556,000
- Day visitors £26,589,000

**£56,366,000 (29%)**



### Attractions/entertainment

- UK staying visitors £13,118,000
- Overseas staying visitors £703,000
- Day visitors £5,877,000

**£19,698,000 (10%)**



### Travel

- UK staying visitors £20,138,000
- Overseas staying visitors £642,000
- Day visitors £9,683,000

**£30,463,000 (16%)**

## Torbay – Other visitor related expenditure by category

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Second Homes  
£278,000



Boats  
£1,157,000



Visiting friends and relatives (non-visitor spend)  
£2,168,000

- 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.

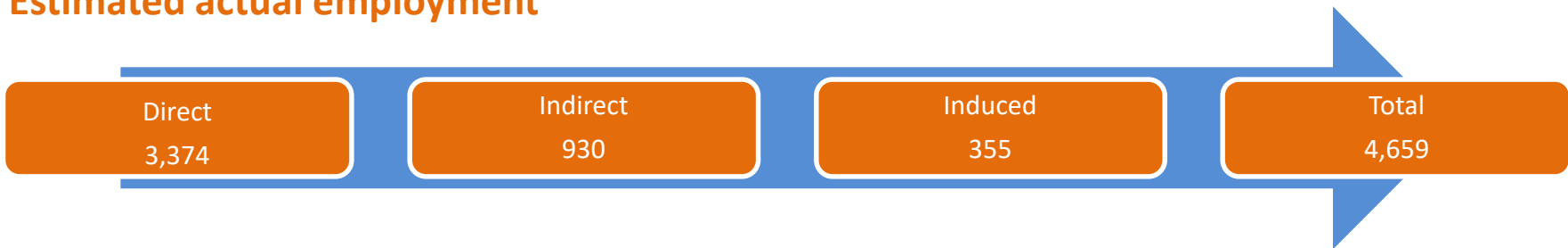
This section of the report looks at employment on three levels;

- **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.

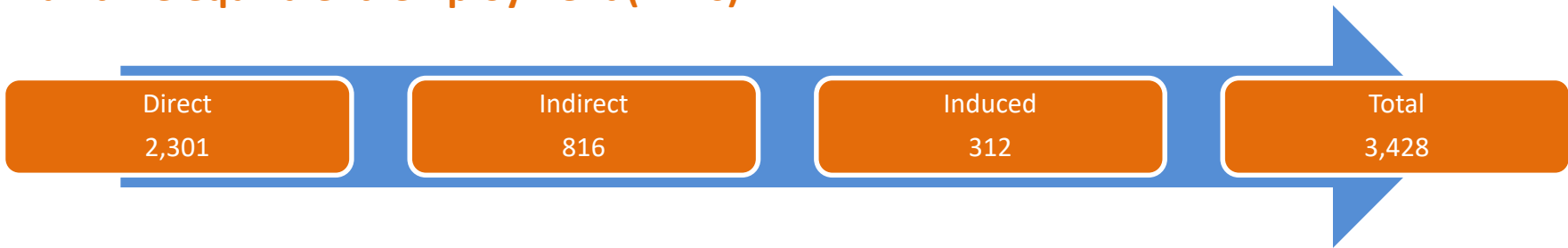
Estimates are shown for actual jobs and full time equivalent jobs (FTE's).

# 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	726	7	734
Retailing	150	159	309
Catering	385	344	729
Attractions/entertainment	240	107	347
Transport	86	40	126
Arising from non trip spend	56	0	56
<b>Total Direct</b>	<b>1,644</b>	<b>657</b>	<b>2,301</b>

## Torbay – Impacts of Covid-19

Staying visitor measures % change compared to 2019	Trips	Nights	Spend
UK staying visitors	-50%	-46%	-52%
Overseas staying visitors	-78%	-75%	-80%
All staying visitors	-52%	-50%	-55%

Day visitor measures % change compared to 2019	Trips	Spend
Urban day visitors	-55%	-54%
Countryside day visitors	-50%	-49%
Coastal day visitors	-44%	-44%
All day visitors	-50%	-50%

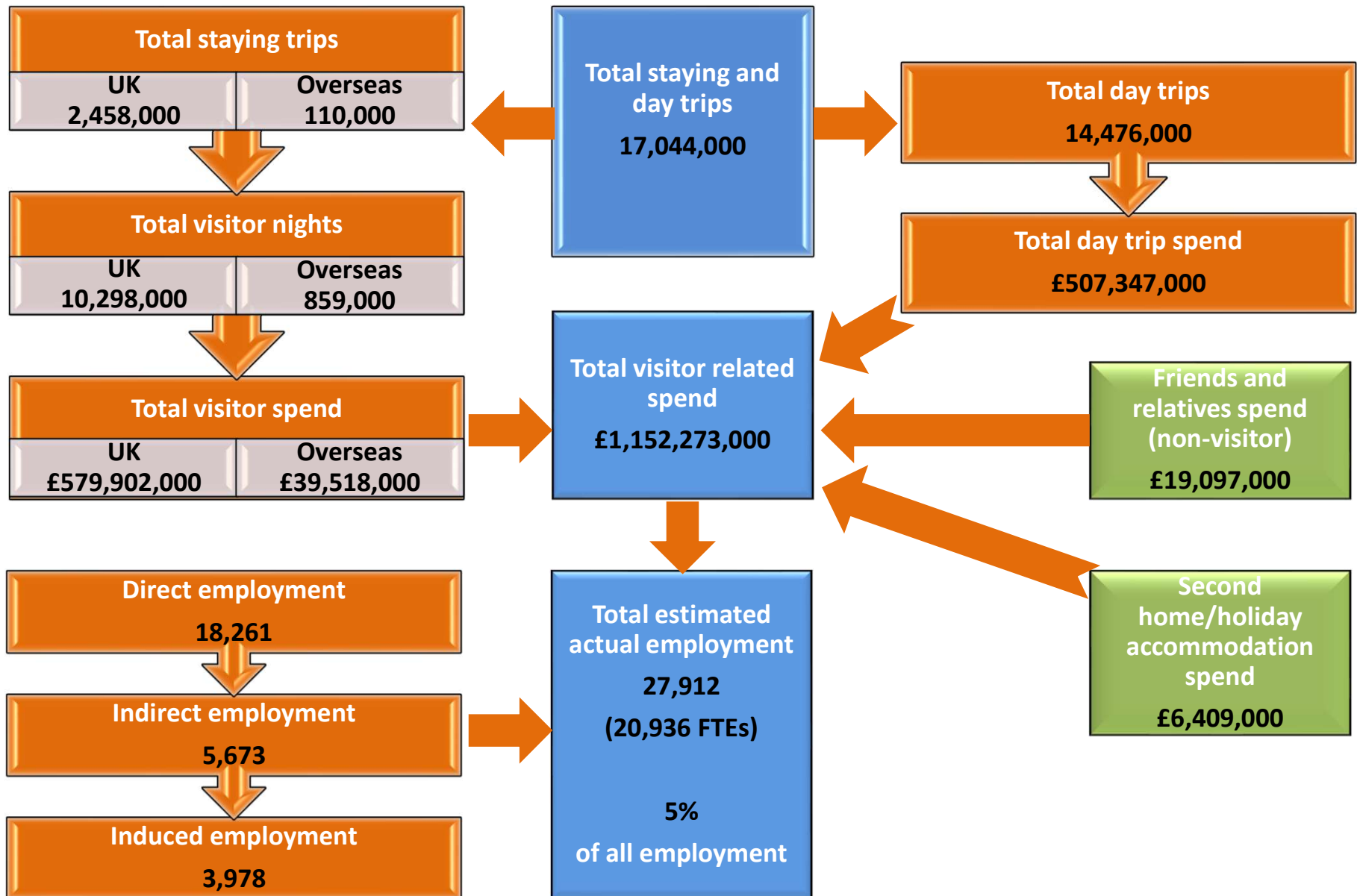
Business turnover change compared to 2019	Staying visitor related	Day visitor related	Total visitor related
Value lost	£228,433,000	£75,901,000	£304,334,000

# Devon 2020





## Devon - Key facts at a glance



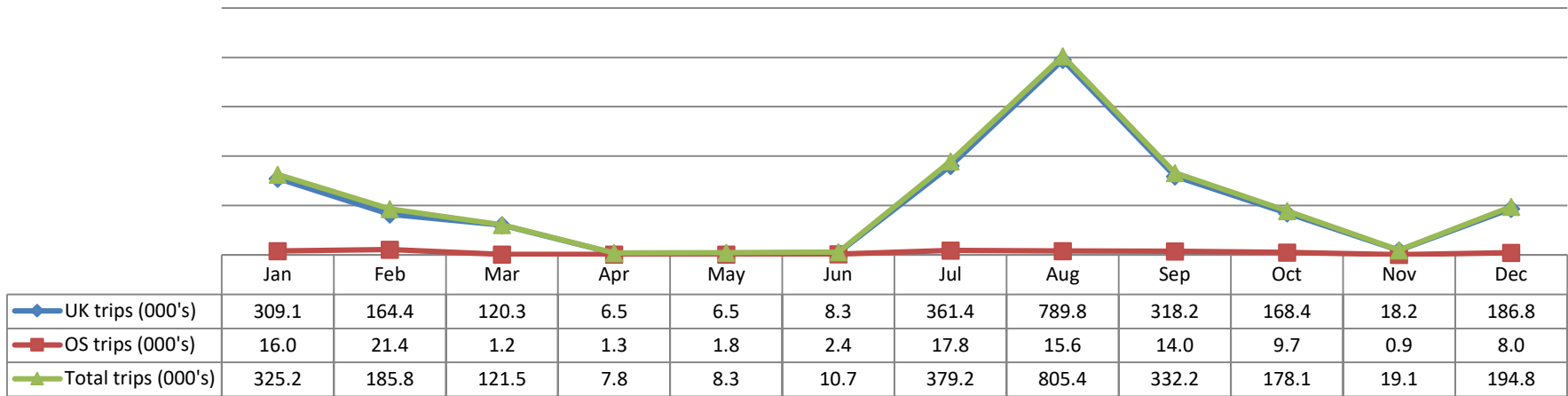
## Devon - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	908,000	2,664,000	£221,992,000
Self catering	338,000	1,963,000	£116,595,000
Touring caravans /tents	292,000	1,521,000	£53,190,000
Static vans/holiday centres	345,000	1,861,000	£79,877,000
Group/campus	42,000	166,000	£7,823,000
Paying guest in private homes	0	0	£0
Second homes	46,000	184,000	£8,710,000
Boat moorings	18,000	72,000	£3,422,000
Other	13,000	51,000	£2,434,000
Staying with friends and relatives	457,000	1,816,000	£85,859,000
<b>Total</b>	<b>2,458,000</b>	<b>10,298,000</b>	<b>£579,902,000</b>

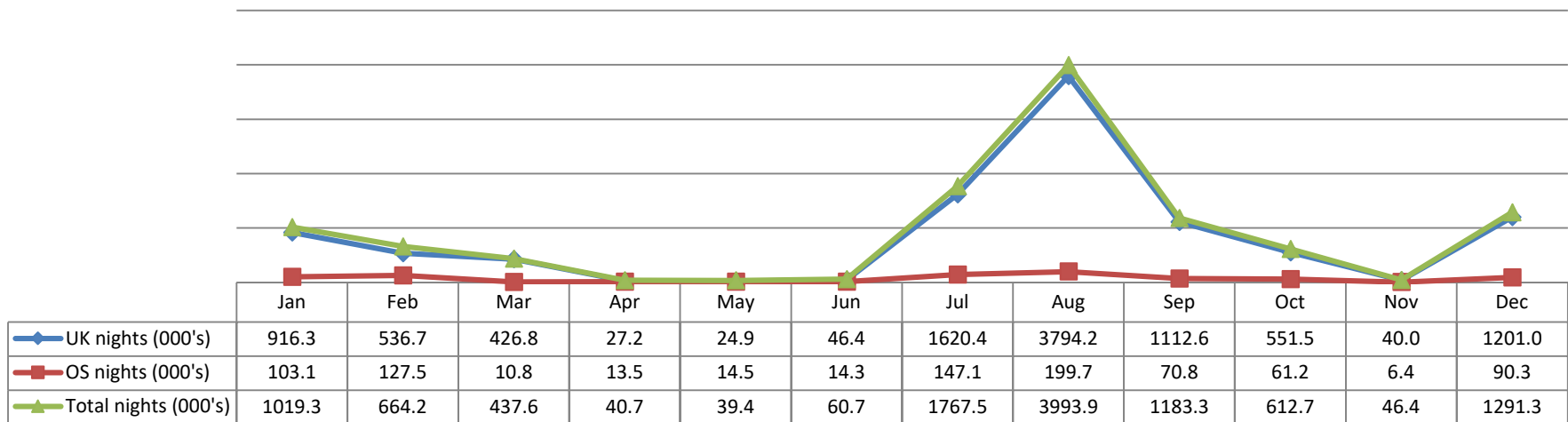
Overseas tourists	Trips	Nights	Spend
Serviced	40,000	189,000	£12,328,000
Self catering	5,000	64,000	£3,130,000
Touring caravans /tents	6,000	42,000	£1,472,000
Static vans/holiday centres	1,000	4,000	£184,000
Group/campus	18,000	178,000	£7,106,000
Paying guest in private homes	9,000	90,000	£3,597,000
Second homes	2,000	17,000	£697,000
Boat moorings	0	0	£0
Other	2,000	14,000	£579,000
Staying with friends and relatives	27,000	261,000	£10,425,000
<b>Total</b>	<b>110,000</b>	<b>859,000</b>	<b>£39,518,000</b>

# Devon - Estimated seasonality of staying visits

Seasonality - trips

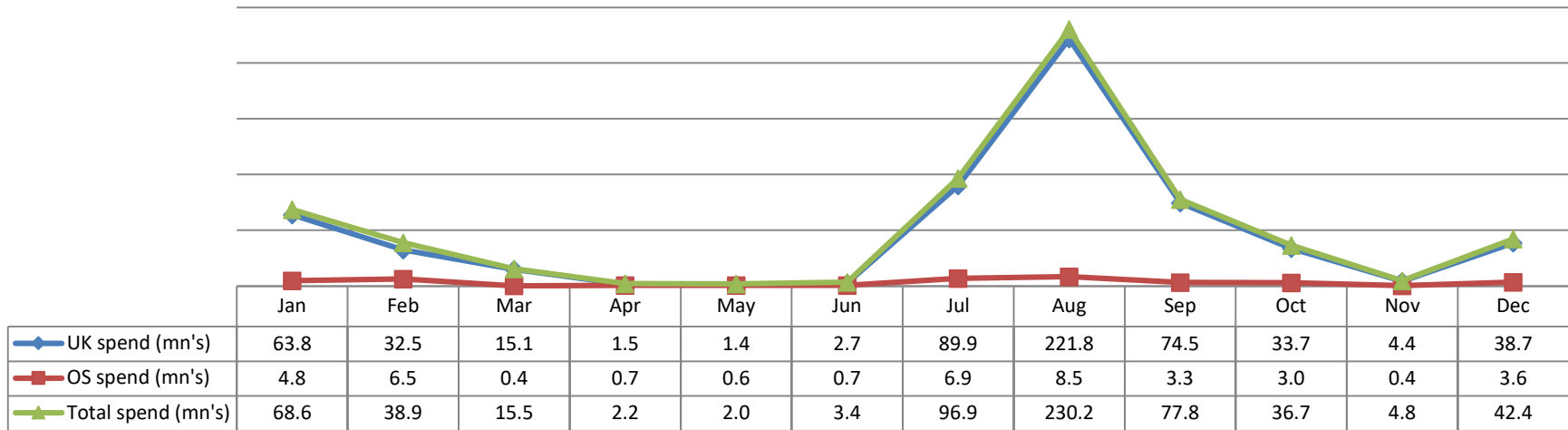


Seasonality - nights



# Devon - Estimated seasonality of staying visits

Seasonality - spend

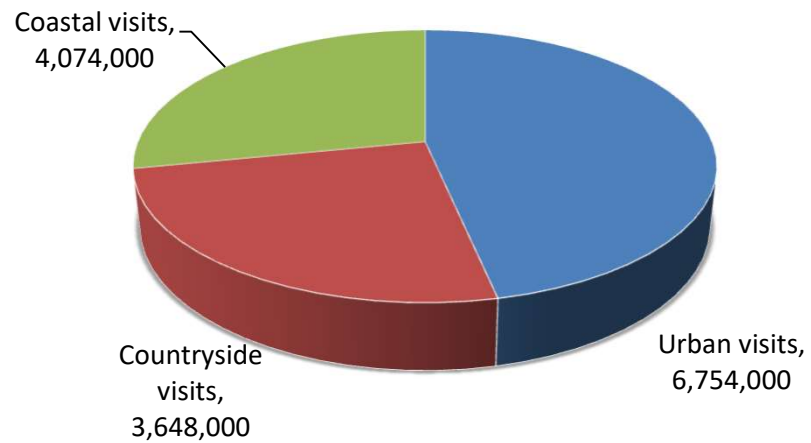


## Devon - Day visits by location

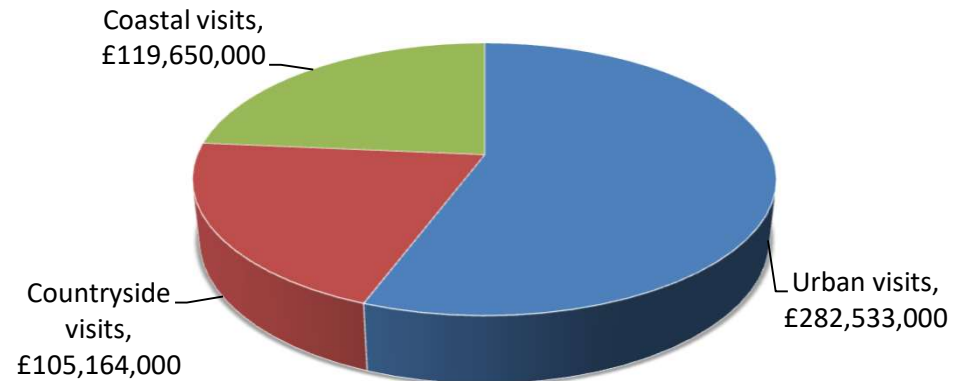
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Total day visits	Total day visit spend
14,476,000	£507,347,000

Day visits

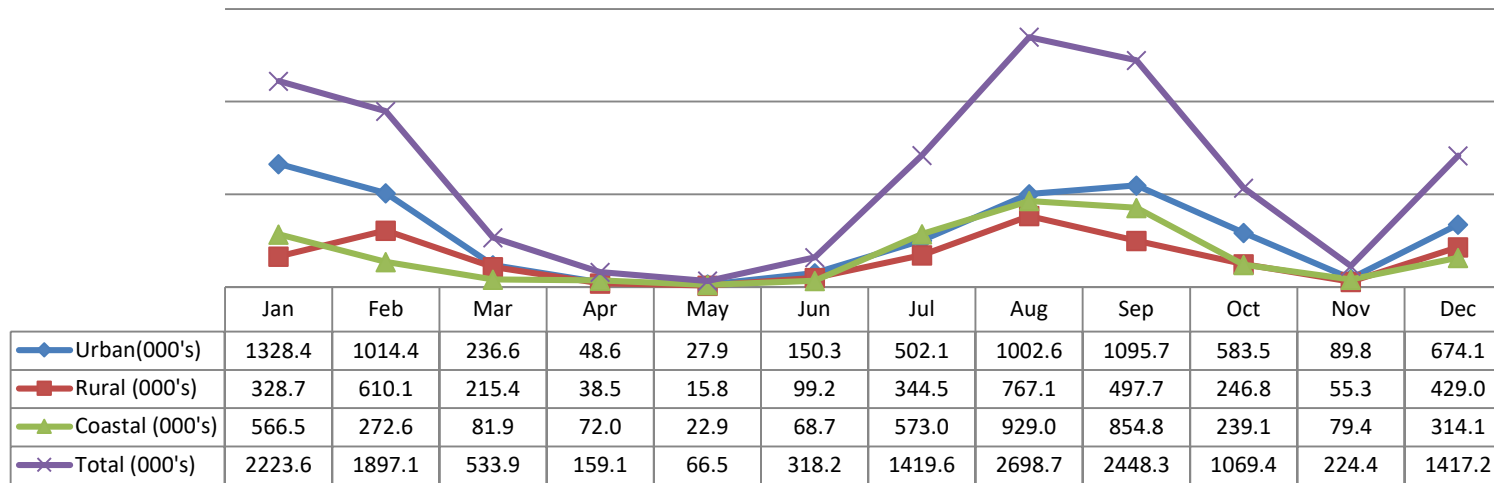


Day visit spend

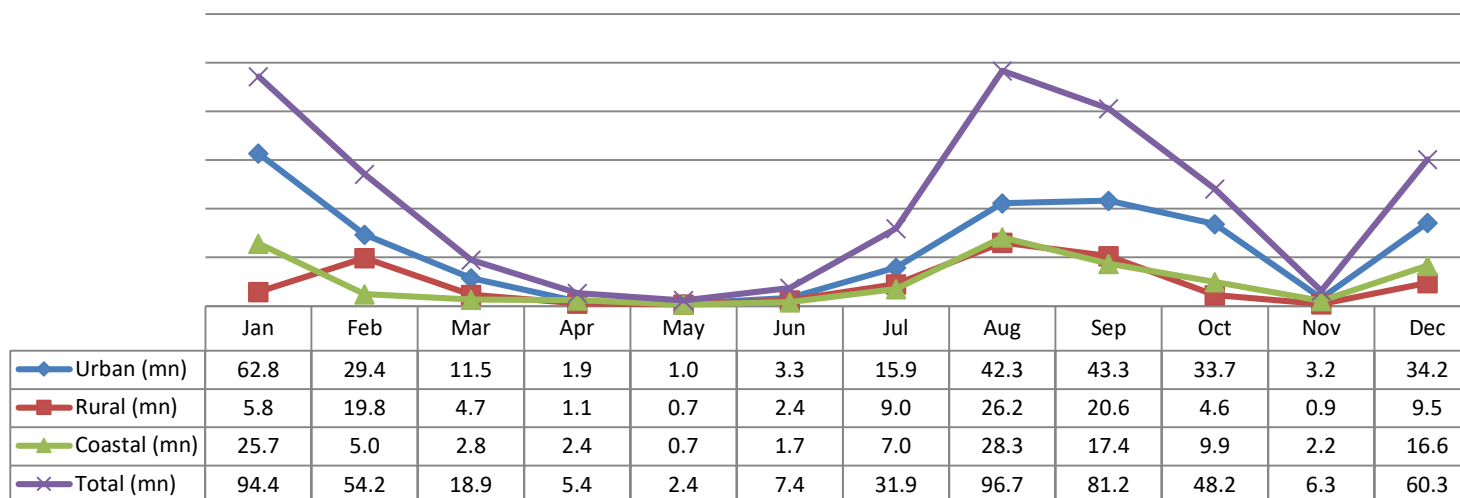


# Devon - Estimated seasonality of day visits

Seasonality - day visits (000's)



Seasonality - day visit spend (millions)



## Devon – Direct visitor expenditure by category



### Accommodation

- UK staying visitors £223,967,000
- Overseas staying visitors £11,505,000

### Totals

**£235,472,000 (21%)**



### Shopping

- UK staying visitors £74,376,000
- Overseas staying visitors £11,616,000
- Day visitors £163,947,000

**£249,939,000 (22%)**



### Food & drink

- UK staying visitors £129,251,000
- Overseas staying visitors £8,795,000
- Day visitors £215,924,000

**£353,970,000 (31%)**



### Attractions/entertainment

- UK staying visitors £60,077,000
- Overseas staying visitors £3,974,000
- Day visitors £55,482,000

**£119,533,000 (11%)**



### Travel

- UK staying visitors £92,231,000
- Overseas staying visitors £3,628,000
- Day visitors £71,995,000

**£167,854,000 (15%)**

## Devon – Other visitor related expenditure by category

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Second Homes  
£2,513,000



Boats  
£3,896,000



Visiting friends and relatives (non-visitor spend)  
£19,097,000



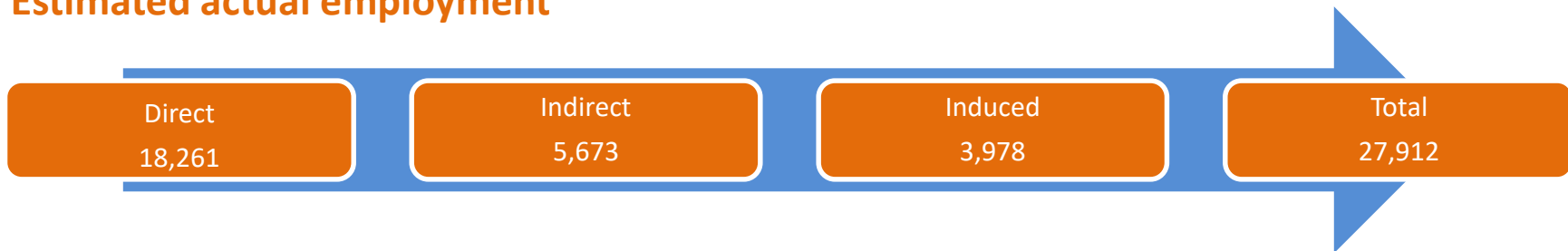
## Devon – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£238,232,000	£4,318,000	£242,550,000
Retailing	£85,132,000	£162,307,000	£247,439,000
Catering	£133,905,000	£209,446,000	£343,351,000
Attractions/entertainment	£66,292,000	£59,281,000	£125,573,000
Transport	£57,515,000	£43,197,000	£100,712,000
Arising from non trip spend	£25,506,213	£0	£25,506,213
<b>Total Direct</b>	<b>£606,582,213</b>	<b>£478,549,000</b>	<b>£1,085,131,213</b>

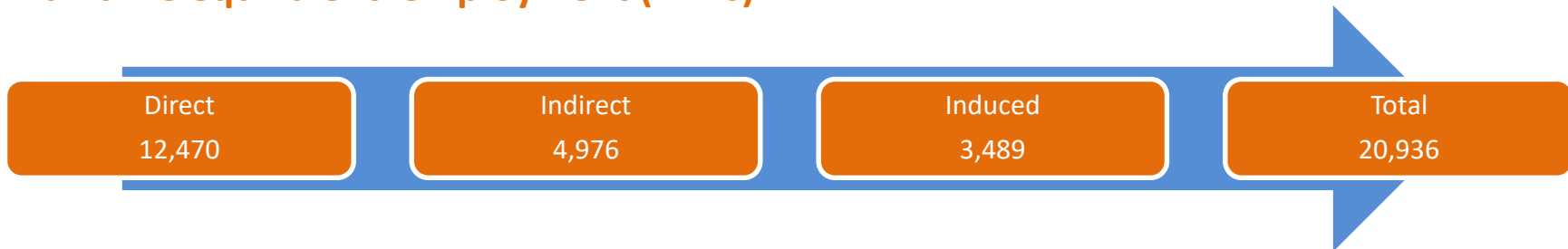
Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£606,582,213	£478,549,000	£1,085,131,213
Supplier and income induced	£338,011,000	£206,528,000	£544,539,000
<b>Total</b>	<b>£944,593,213</b>	<b>£685,077,000</b>	<b>£1,629,670,213</b>

# 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	3,155	57	3,212
Retailing	662	1,262	1,925
Catering	1,678	2,624	4,301
Attractions/entertainment	1,047	936	1,983
Transport	373	280	653
Arising from non trip spend	397	0	397
<b>Total Direct</b>	<b>7,311</b>	<b>5,160</b>	<b>12,470</b>

# Impacts of Covid-19



## Devon – Impacts on staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	-45%	-44%	-54%
Self catering	-36%	-34%	-46%
Touring caravans /tents	-49%	-50%	-50%
Static vans/holiday centres	-46%	-41%	-50%
Group/campus	-58%	-41%	-50%
Paying guest in private homes	0%	0%	0%
Second homes	-62%	-69%	-50%
Boat moorings	-38%	-47%	-50%
Other	-78%	-51%	-50%
Staying with friends and relatives	-71%	-66%	-50%
Total	-53%	-50%	-51%

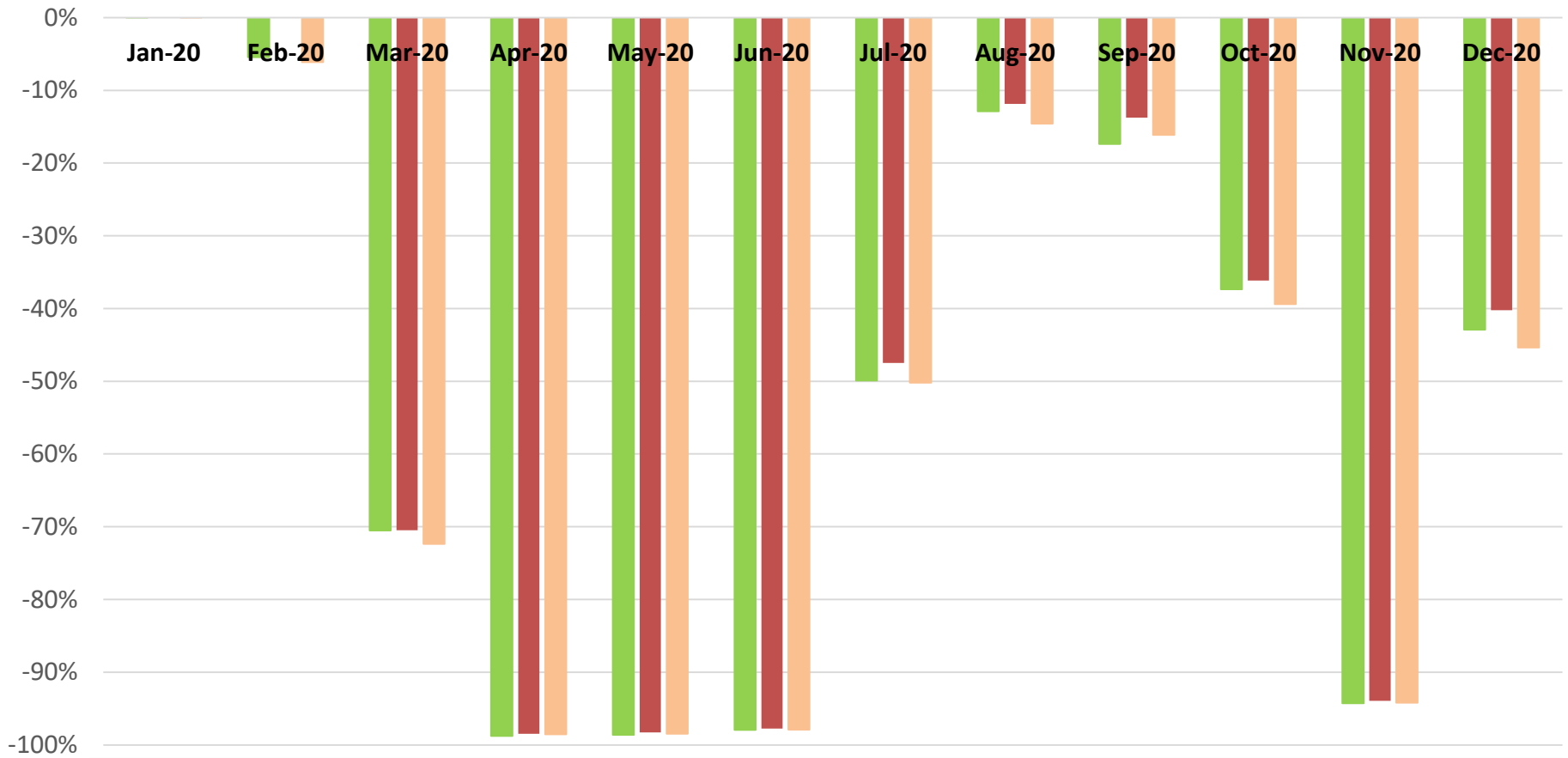
Overseas tourists	Trips	Nights	Spend
Serviced	-79%	-72%	-81%
Self catering	-76%	-68%	-78%
Touring caravans /tents	-77%	-70%	-79%
Static vans/holiday centres	-67%	-76%	-79%
Group/campus	-28%	-62%	-80%
Paying guest in private homes	-44%	-73%	-80%
Second homes	-33%	-70%	-80%
Boat moorings	0%	0%	0%
Other	-88%	-85%	-80%
Staying with friends and relatives	-83%	-81%	-80%
Total	-76%	-74%	-80%

## Devon – Impacts on staying visits by accommodation type

All staying visits combined	Trips	Nights	Spend
Serviced	-49%	-48%	-57%
Self catering	-37%	-36%	-48%
Touring caravans /tents	-51%	-51%	-52%
Static vans/holiday centres	-46%	-41%	-50%
Group/campus	-52%	-54%	-70%
Paying guest in private homes	-44%	-73%	-80%
Second homes	-61%	-69%	-55%
Boat moorings	-38%	-47%	-50%
Other	-80%	-67%	-61%
Staying with friends and relatives	-72%	-69%	-57%
Total	-55%	-53%	-55%

# Devon – Staying visits impacts by month

Proportions of anticipated staying visitor measures lost

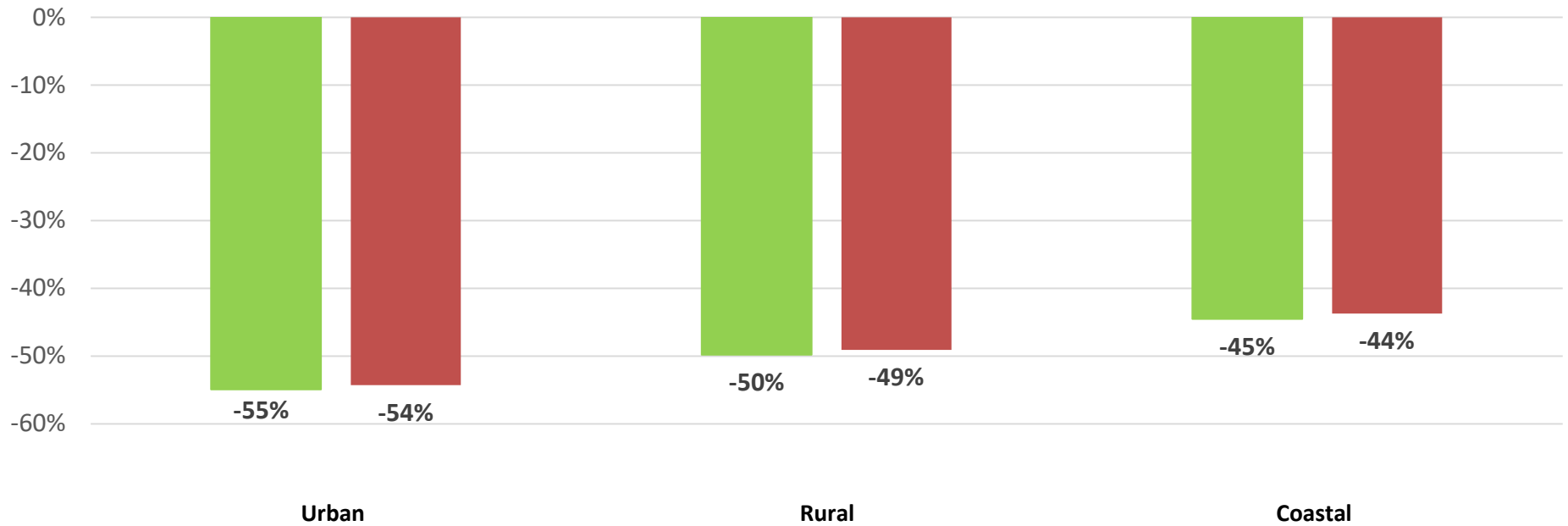


	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20
Trips	3%	-5%	-71%	-99%	-99%	-98%	-50%	-13%	-17%	-37%	-94%	-43%
Nights	10%	1%	-70%	-98%	-98%	-98%	-47%	-12%	-14%	-36%	-94%	-40%
Spend	5%	-6%	-72%	-99%	-98%	-98%	-50%	-15%	-16%	-39%	-94%	-45%

# Devon – Impacts on day visits by location

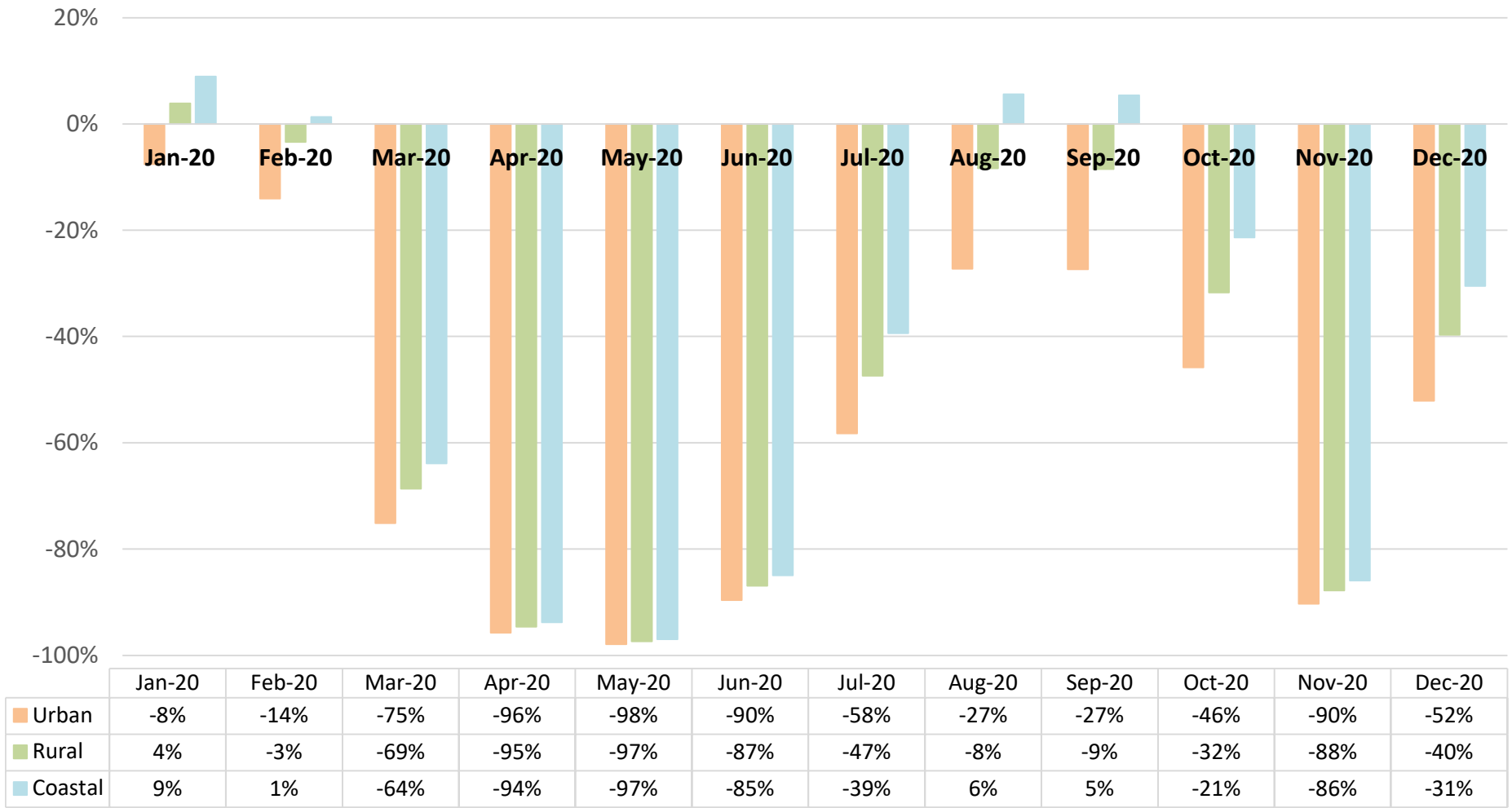
Total day visits	Total day visit spend
-51%	-51%

Proportion of anticipated visits and turnover lost



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

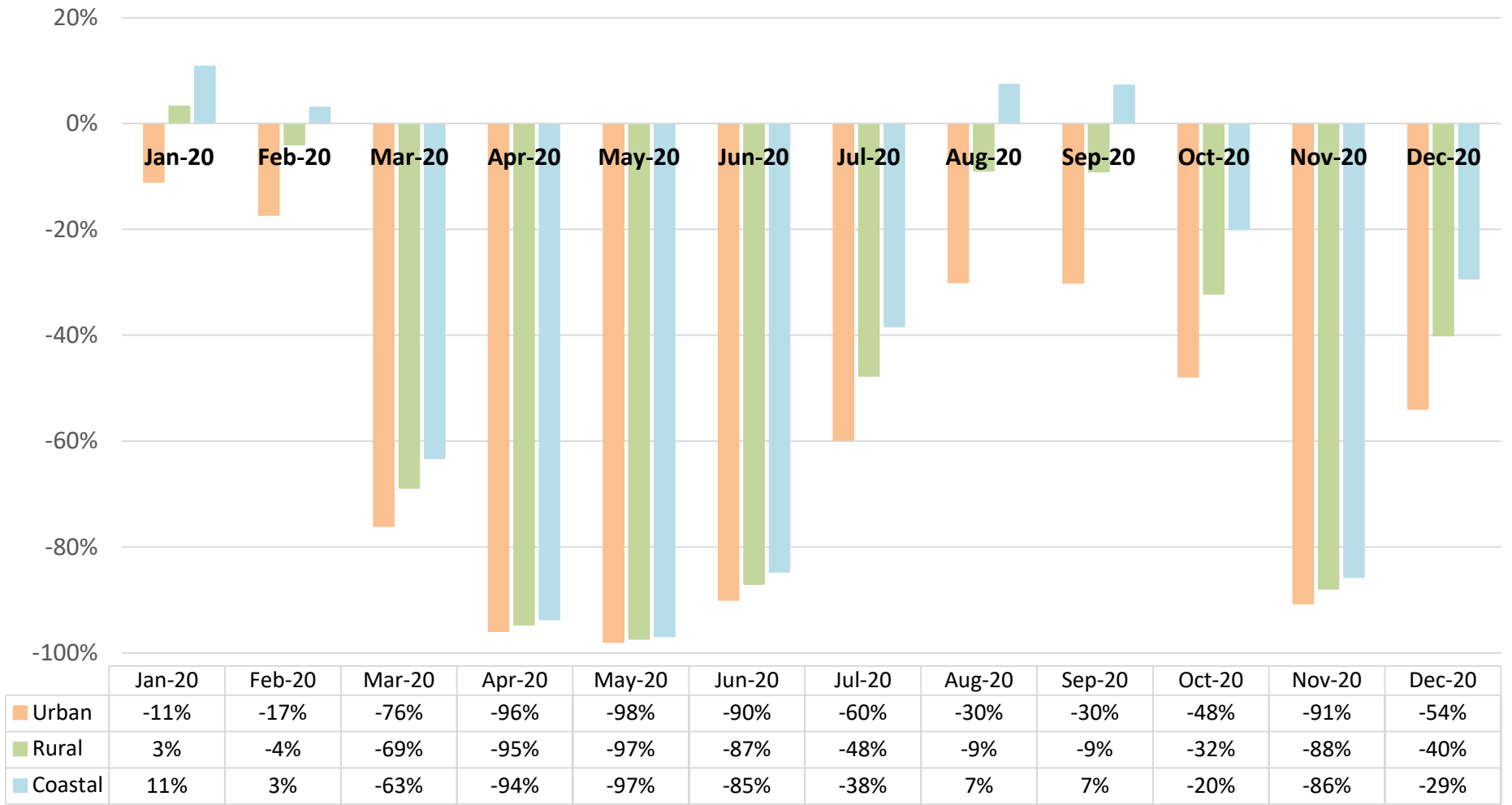
Proportions of anticipated day visits change





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

Proportions of anticipated day visits spend change



## Devon – Impacts on business turnover

Decrease in turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£261,910,000	£4,400,000	£266,310,000
Retailing	£122,762,000	£166,880,000	£289,642,000
Catering	£164,816,000	£213,402,000	£378,218,000
Attractions/entertainment	£90,026,000	£67,630,000	£157,656,000
Transport	£73,834,000	£46,587,000	£120,421,000
Arising from non trip spend	£52,471,787	£0	£52,471,787
<b>Total Direct</b>	<b>£765,819,787</b>	<b>£498,899,000</b>	<b>£1,264,718,787</b>

Decrease in total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£765,819,787	£498,899,000	£1,264,718,787
Supplier and income induced	£410,803,000	£214,520,000	£625,323,000
<b>Total</b>	<b>£1,176,622,787</b>	<b>£713,419,000</b>	<b>£1,890,041,787</b>