

The Economic Impact of Devon's Visitor Economy 2015

Mid-Devon



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 Mid-Devon and Devon county in 2015. 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 17 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 2015, including key facts about the economy, weather and key events please see Appendix 2 of this report.

Value of Tourism 2015

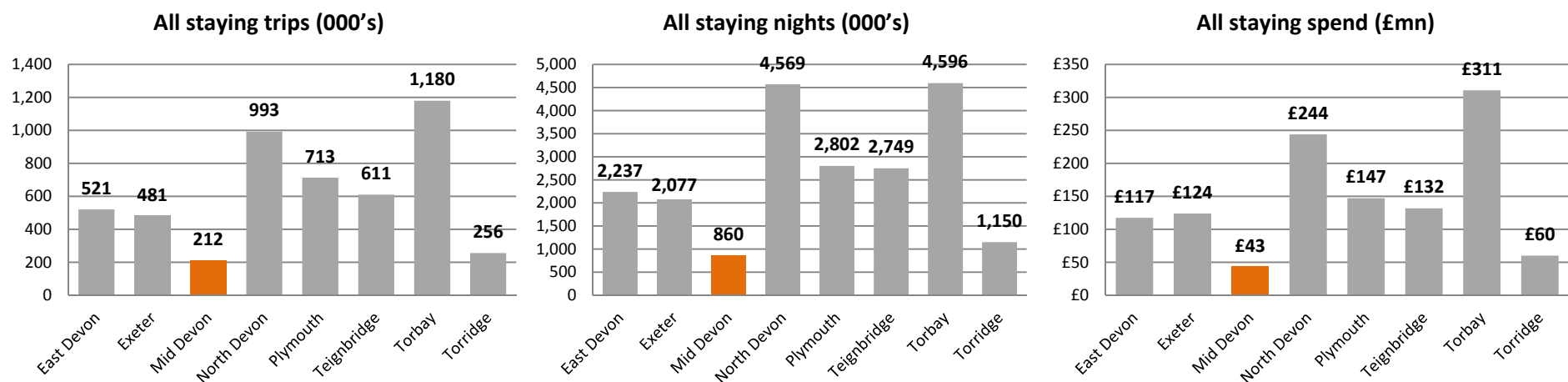
Mid-Devon

Key Facts	
212,000	Staying visitor trips
860,000	Staying visitor nights
£43,165,000	Staying visitor spend
1,589,000	Day visits
£52,909,000	Day visitor spend
£96,074,000	Direct visitor spend
£5,059,000	Other related spend
£101,133,000	TOTAL VISITOR RELATED SPEND
2,084	Estimated actual employment
1,505	FTE employment
5%	Proportion of all employment

Mid-Devon – Staying visits

Information on staying visits is derived from the Great Britain Tourism Survey (GBTS) for domestic visitors and from the International Passenger Survey (IPS) for Overseas visitors. The methodology of both surveys has been stable since 2006 allowing for direct comparison between years and the analysis of trend data. Data at a county level is derived from the national surveys for trips, nights and spend but adjusted to account for local data and modelled below this level.

Mid-Devon - 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	478	43	1,905	332	£100	£17
Exeter	423	58	1,446	631	£86	£37
Mid Devon	193	19	727	133	£37	£6
North Devon	937	56	4,205	364	£224	£20
Plymouth	637	76	2,186	616	£114	£33
Teignbridge	573	38	2,488	261	£119	£13
Torbay	1,084	96	4,033	563	£274	£36
Torrige	237	19	1,006	144	£53	£7

Mid-Devon - Staying visits by accommodation type

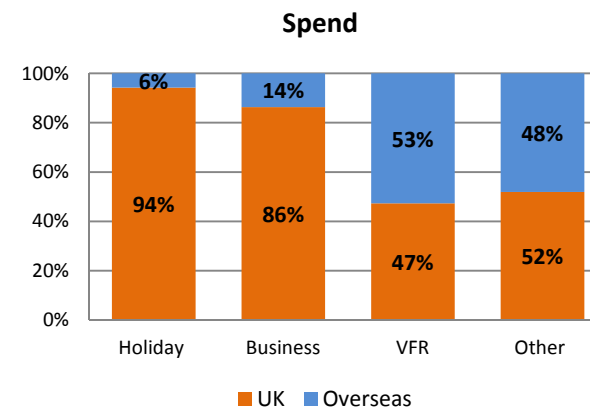
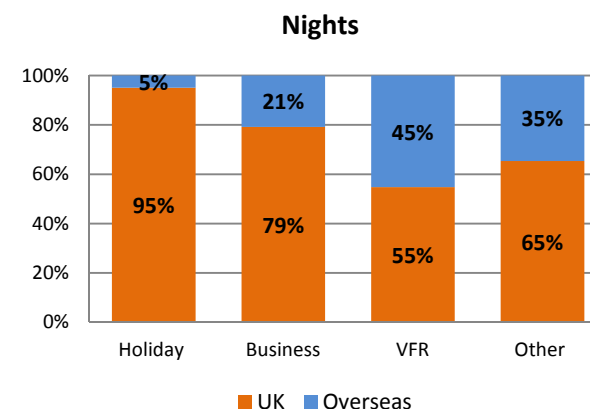
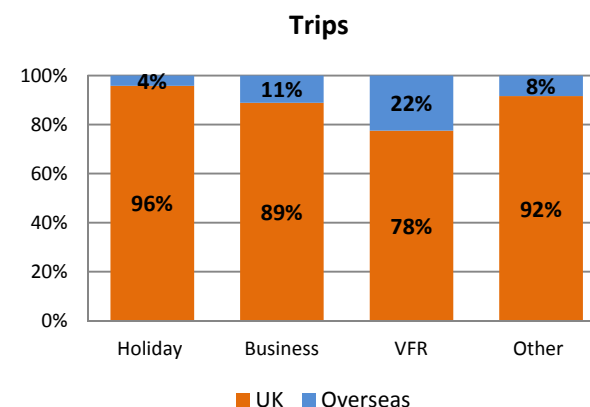
Domestic tourists	Trips	Nights	Spend
Serviced	49,000	138,000	£13,561,000
Self catering	15,000	85,000	£6,400,000
Touring caravans /tents	11,000	53,000	£1,656,000
Static vans/holiday centres	3,000	15,000	£742,000
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	3,000	15,000	£565,000
Boat moorings	0	0	£0
Other	4,000	16,000	£428,000
Staying with friends and relatives	108,000	406,000	£13,403,000
Total	193,000	727,000	£36,755,000

Overseas tourists	Trips	Nights	Spend
Serviced	5,000	20,000	£1,784,000
Self catering	1,000	8,000	£507,000
Touring caravans /tents	1,000	3,000	£140,000
Static vans/holiday centres	0	0	£5,000
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	0	2,000	£78,000
Boat moorings	0	0	£0
Other	0	4,000	£147,000
Staying with friends and relatives	12,000	96,000	£3,748,000
Total	19,000	133,000	£6,410,000

Mid-Devon - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	137,000	578,000	£30,329,000
Business	8,000	19,000	£2,498,000
Visits to friends and relatives	38,000	97,000	£2,745,000
Other	11,000	34,000	£1,183,000
Study	0	0	£0
Total	193,000	727,000	£36,755,000

Overseas tourists	Trips	Nights	Spend
Holiday	6,000	30,000	£1,860,000
Business	1,000	5,000	£395,000
Visits to friends and relatives	11,000	80,000	£3,059,000
Other	1,000	18,000	£1,096,000
Study	0	0	£0
Total	19,000	133,000	£6,410,000



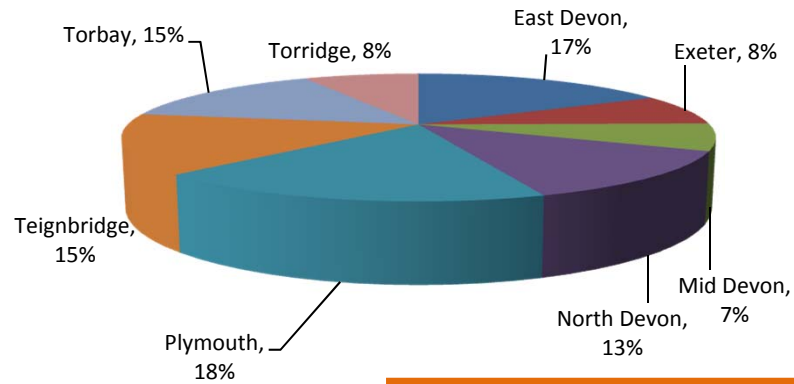
Mid-Devon – Day visits

Information on day visits within this report has been derived from the 2015 Great Britain Day Visit Survey (GBDVS). The survey, which was first undertaken in 2011, provides a much needed update on day visit activity in Great Britain and generally speaking estimated greater frequencies of trip taking than the previous day visit survey (England Leisure Visits Survey 2005). As a result of the new methodology in 2011 comparisons with previous day visit estimates are not possible.

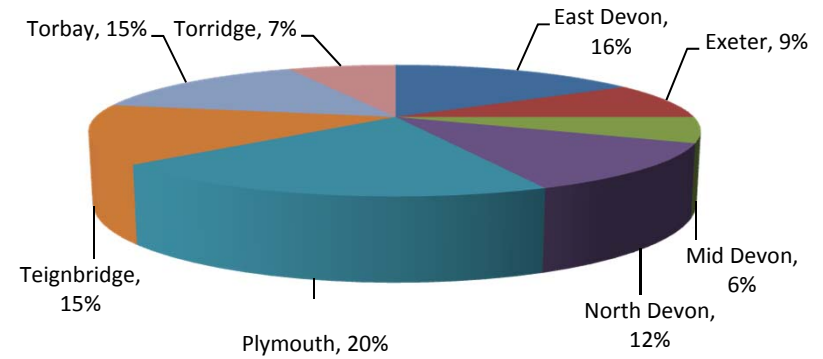
The GBDVS distinguishes between day visits to a town or city; to the seaside and coast; and to the countryside. Different drivers are used within the model to distribute these trips. Local 'drivers' such as attraction footfall, quality and size of countryside and coastline are factored into the model for this purpose.

Mid-Devon - Day visits in the county context

All day visits



All day visit spend

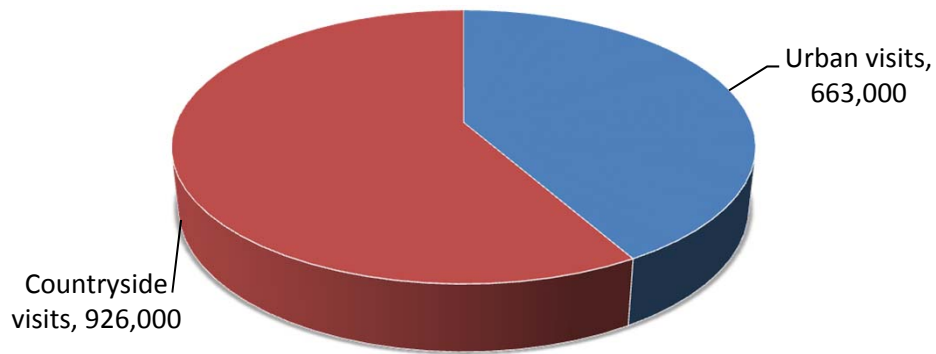


Area	Day visits	Day visit spend
East Devon	4.0	£135.1
Exeter	1.8	£74.6
Mid Devon	1.6	£52.9
North Devon	3.0	£101.6
Plymouth	4.3	£169.4
Teignbridge	3.5	£121.7
Torbay	3.4	£125.3
Torrige	1.8	£58.4

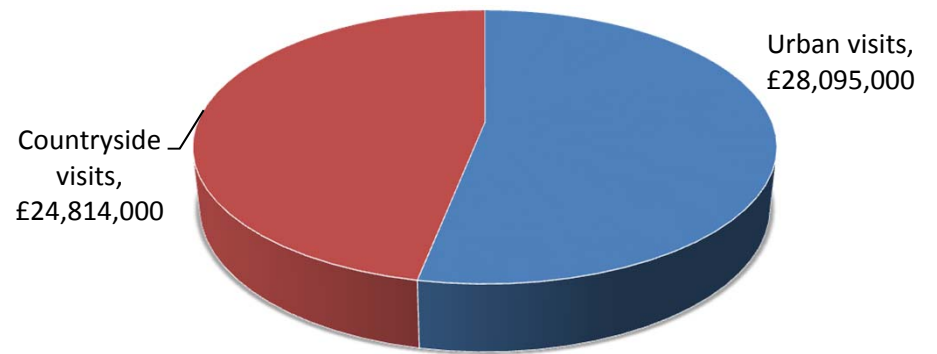
Mid-Devon - Day visits by location

Total day visits	Total day visit spend
1,589,000	£52,909,000

Day visits



Day visit spend



Mid-Devon - Direct visitor expenditure by category

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.

Mid-Devon – Direct visitor expenditure by category



Accommodation

- UK staying visitors £13,518,000
- Overseas staying visitors £1,611,000



Shopping

- UK staying visitors £4,684,000
- Overseas staying visitors £1,948,000
- Day visitors £17,072,000



Food & drink

- UK staying visitors £8,241,000
- Overseas staying visitors £1,438,000
- Day visitors £21,965,000



Attractions/entertainment

- UK staying visitors £4,012,000
- Overseas staying visitors £779,000
- Day visitors £7,170,000



Travel

- UK staying visitors £6,301,000
- Overseas staying visitors £634,000
- Day visitors £6,701,000

Mid-Devon – Other visitor related expenditure by category



Second Homes

£180,000



Boats

£0



Visiting friends and relatives (non-visitor spend)

£4,879,000

- 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.

Mid-Devon – Tourism related employment

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.

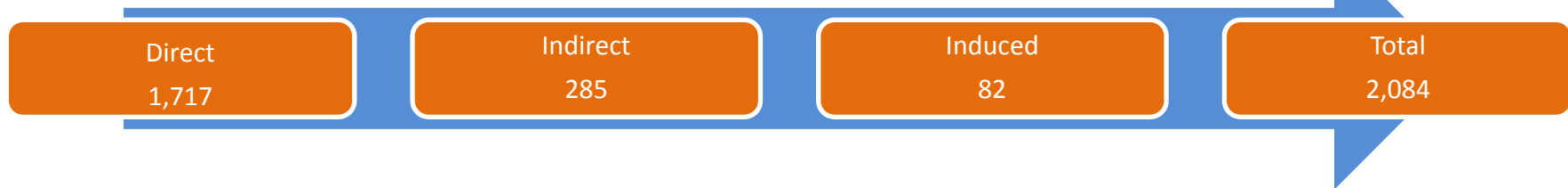
This section of the report looks at employment on three levels;

- **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.

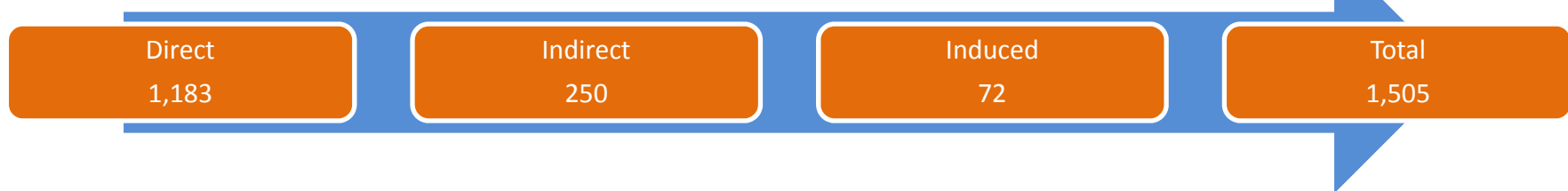
Estimates are shown for actual jobs and full time equivalent jobs (FTE's).

Mid-Devon – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)

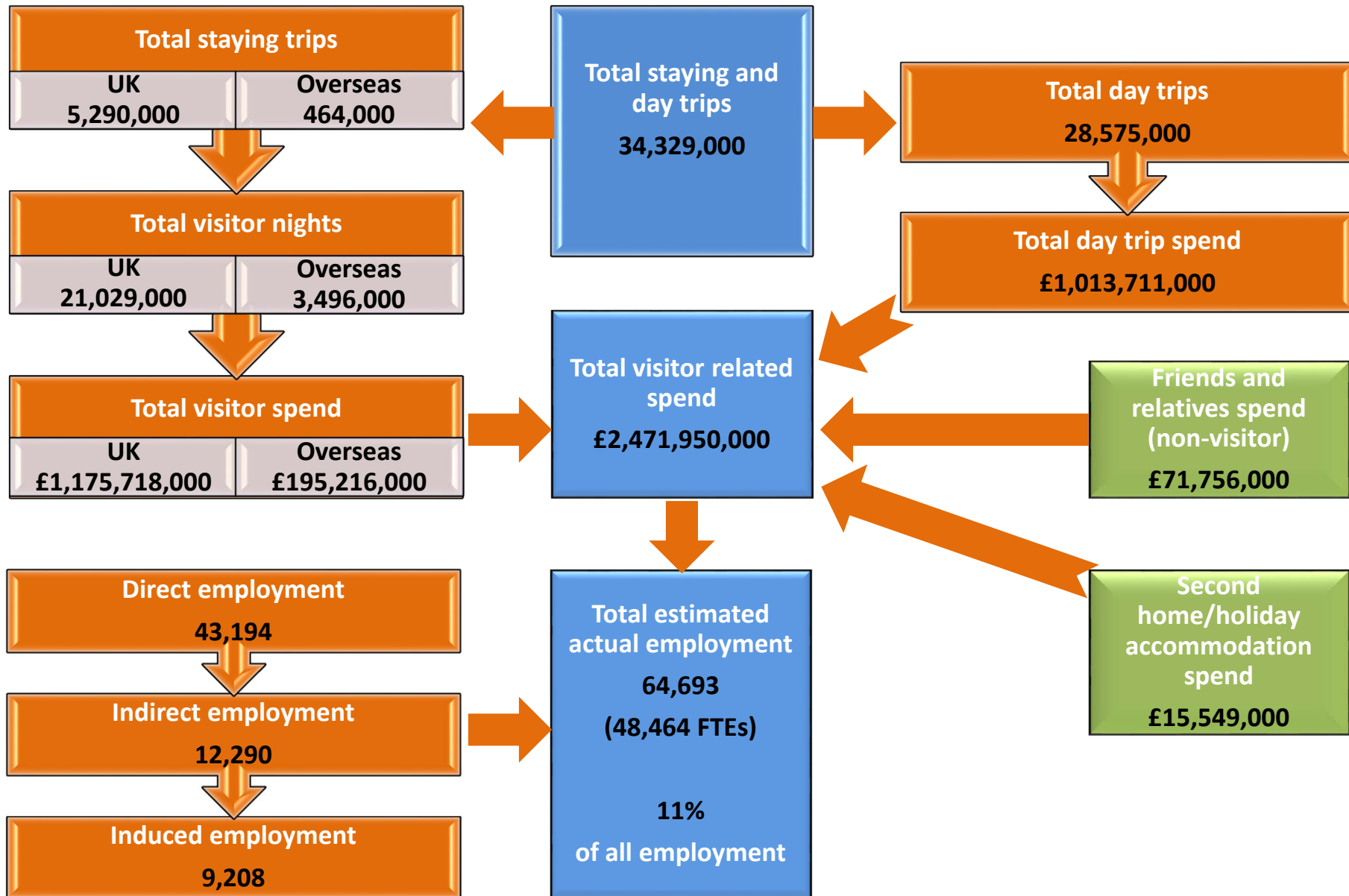


Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	244	7	251
Retailing	56	145	201
Catering	120	273	393
Attractions/entertainment	81	123	204
Transport	27	26	54
Arising from non trip spend	80	0	80
Total Direct	609	574	1,183

Devon 2015

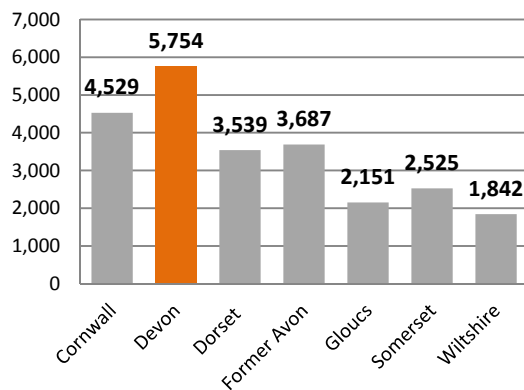


Devon - Key facts at a glance

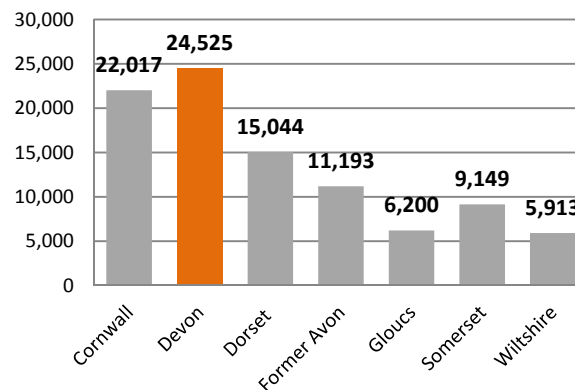


Devon - Staying visits in the regional context

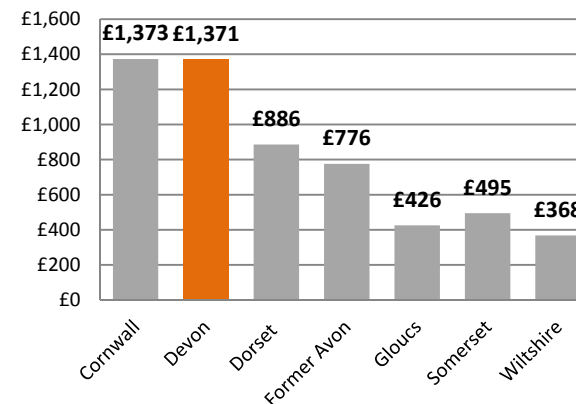
All staying trips (000's)



All staying nights (000's)



All staying spend (millions)



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cornwall	4,210	319	19,760	2,257	£1,248	£125
Devon	5,290	464	21,029	3,496	£1,176	£195
Dorset	3,193	346	11,619	3,425	£672	£214
Former Avon	2,820	867	6,284	4,909	£495	£280
Gloucestershire	1,893	258	4,504	1,696	£314	£111
Somerset	2,306	219	7,619	1,530	£420	£74
Wiltshire	1,545	297	4,141	1,772	£271	£97

Devon - Staying visits by accommodation type

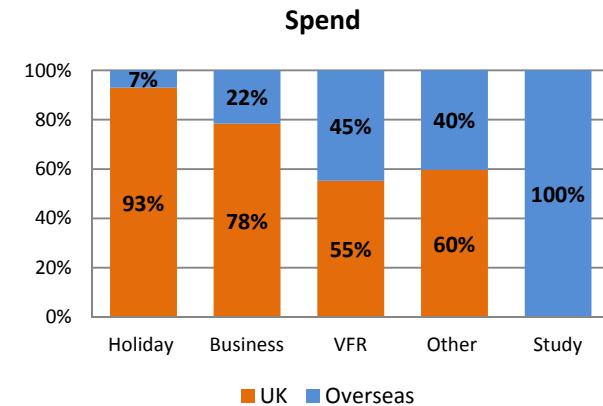
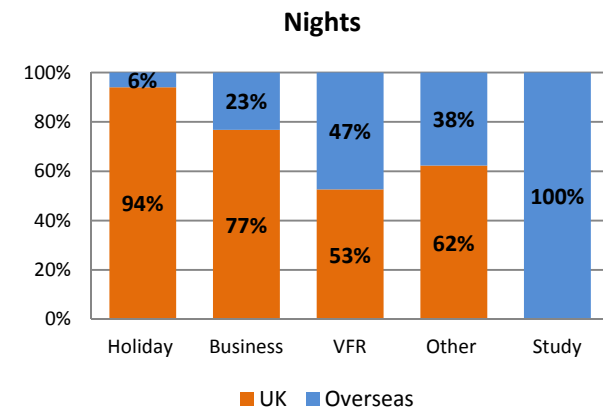
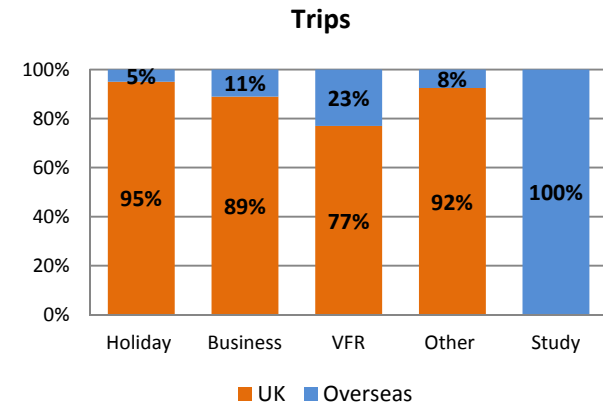
Domestic tourists	Trips	Nights	Spend
Serviced	1,582,000	4,435,000	£437,256,000
Self catering	512,000	2,897,000	£218,235,000
Touring caravans /tents	520,000	2,625,000	£81,950,000
Static vans/holiday centres	743,000	3,786,000	£188,787,000
Group/campus	91,000	274,000	£13,744,000
Paying guest in private homes	0	0	£0
Second homes	154,000	698,000	£25,650,000
Boat moorings	32,000	113,000	£6,679,000
Other	64,000	231,000	£6,296,000
Staying with friends and relatives	1,592,000	5,969,000	£197,121,000
Total	5,290,000	21,029,000	£1,175,718,000

Overseas tourists	Trips	Nights	Spend
Serviced	176,000	637,000	£57,540,000
Self catering	24,000	287,000	£17,298,000
Touring caravans /tents	27,000	160,000	£6,943,000
Static vans/holiday centres	4,000	24,000	£1,191,000
Group/campus	26,000	558,000	£35,638,000
Paying guest in private homes	16,000	282,000	£15,760,000
Second homes	5,000	77,000	£3,561,000
Boat moorings	0	0	£0
Other	7,000	54,000	£2,157,000
Staying with friends and relatives	179,000	1,417,000	£55,128,000
Total	464,000	3,496,000	£195,216,000

Devon - Staying visits by purpose

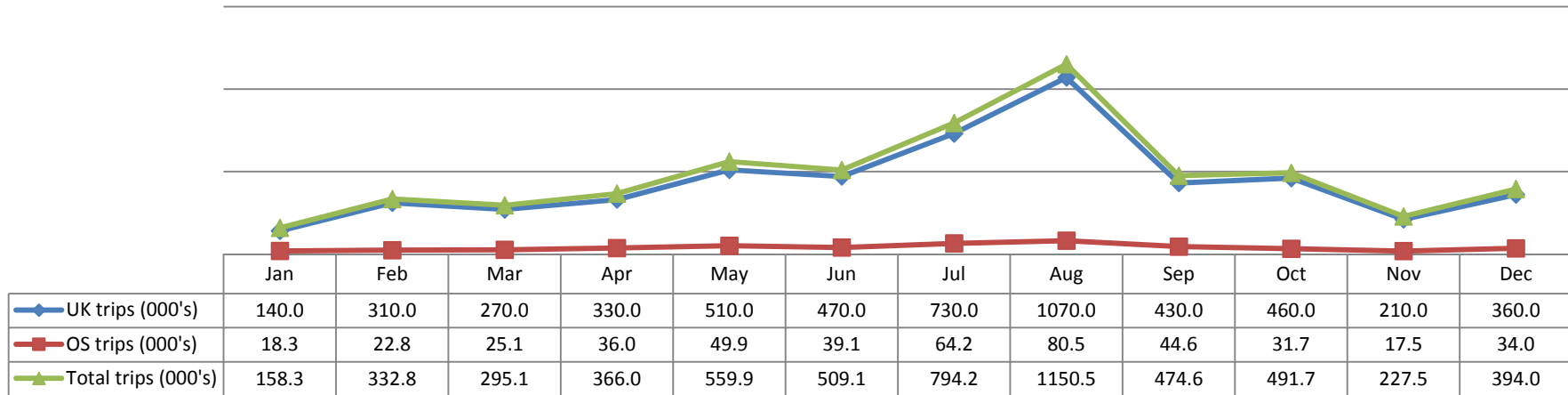
Domestic tourists	Trips	Nights	Spend
Holiday	4,173,000	18,042,000	£992,256,000
Business	404,000	1,006,000	£89,231,000
Visits to friends and relatives	553,000	1,474,000	£65,850,000
Other	160,000	508,000	£28,382,000
Study	0	0	£0
Total	5,290,000	21,029,000	£1,175,718,000

Overseas tourists	Trips	Nights	Spend
Holiday	218,000	1,142,000	£74,363,000
Business	50,000	304,000	£24,613,000
Visits to friends and relatives	165,000	1,328,000	£53,395,000
Other	13,000	307,000	£19,141,000
Study	19,000	415,000	£23,705,000
Total	464,000	3,496,000	£195,216,000

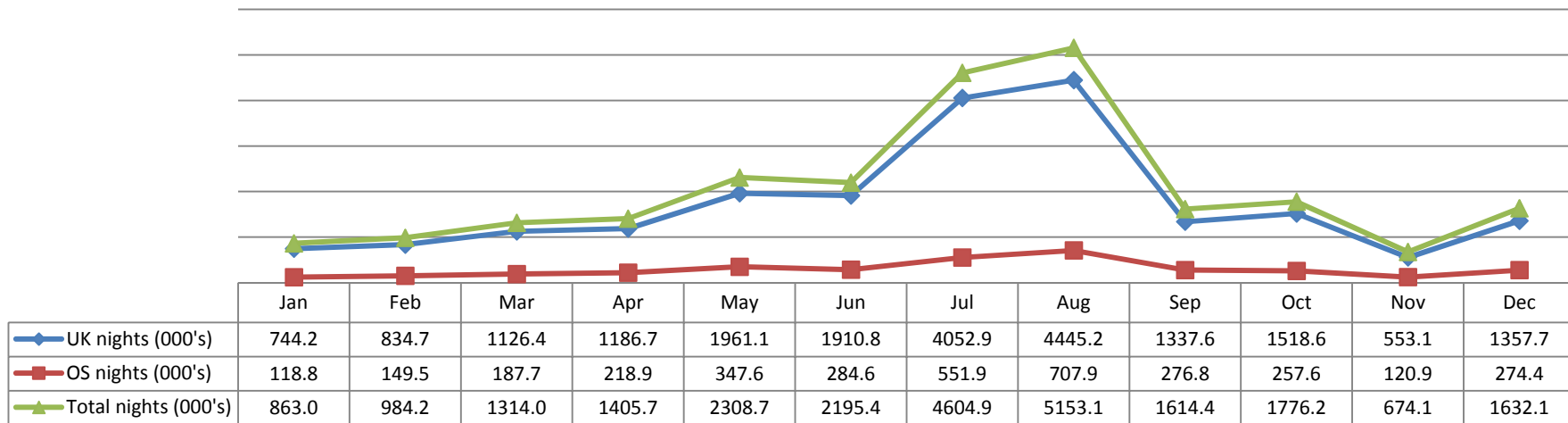


Devon - Estimated seasonality of staying visits

Seasonality - trips

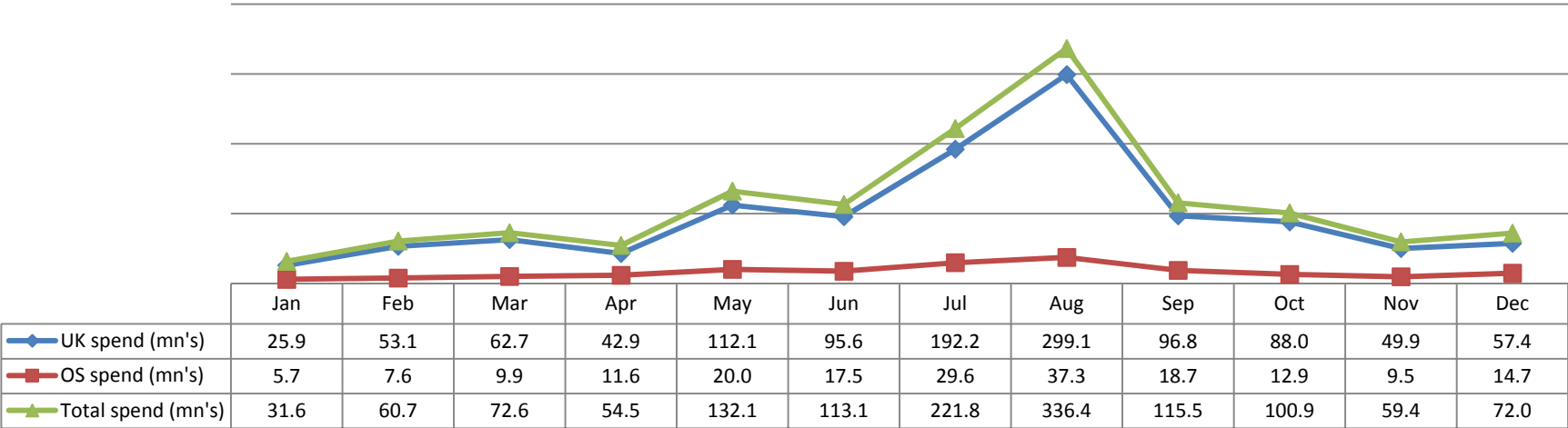


Seasonality - nights

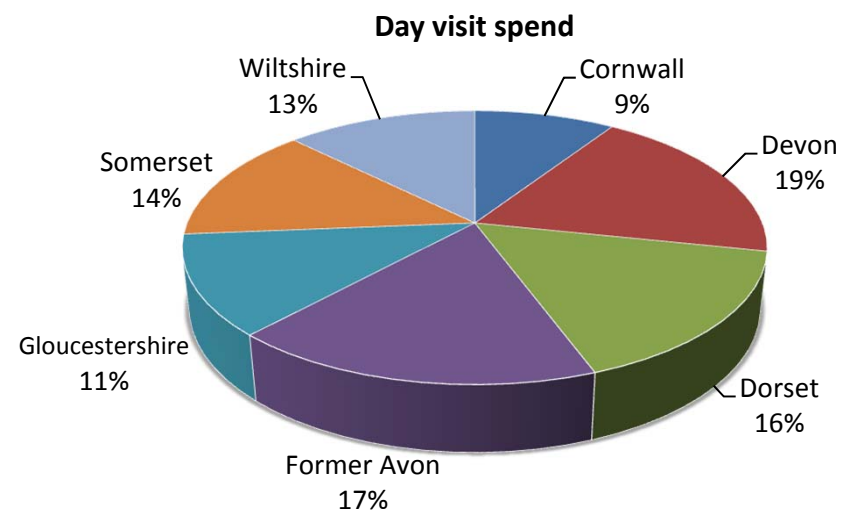
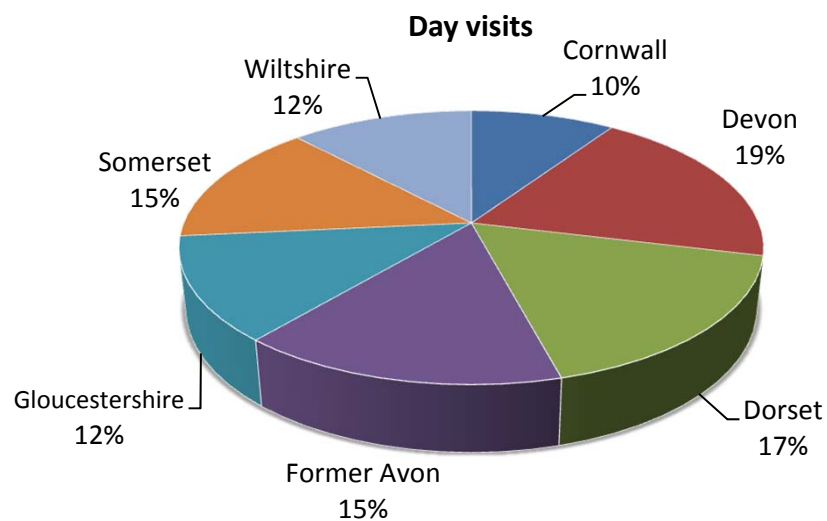


Devon - Estimated seasonality of staying visits

Seasonality - spend



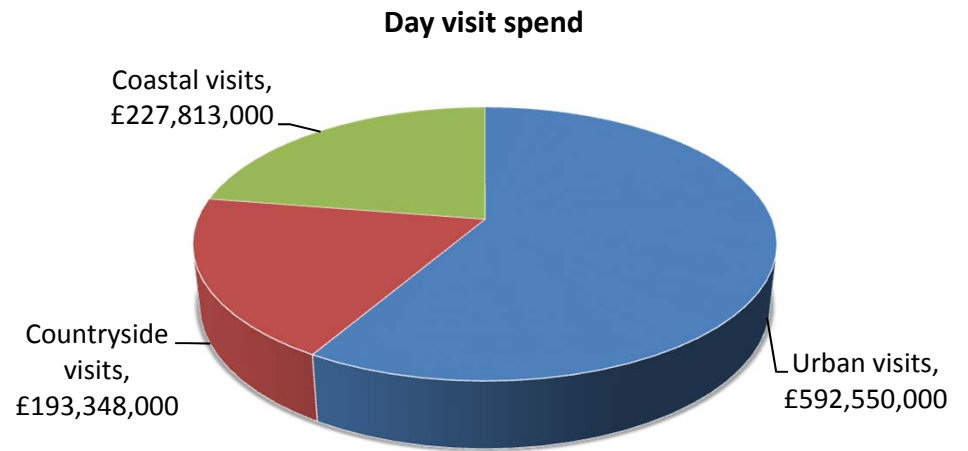
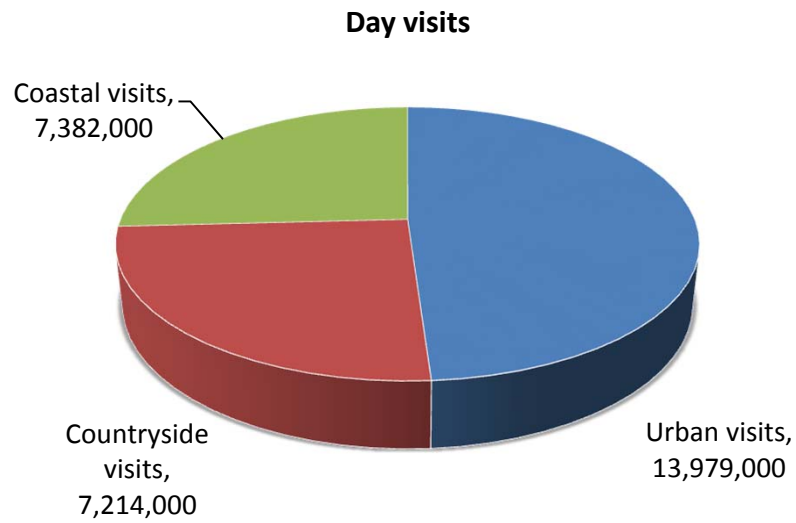
Devon - Day visits in the regional context



Area	Day visits (millions)	Day visit spend (millions)
Cornwall	14.0	£491.8
Devon	28.6	£1,013.7
Dorset	25.2	£855.1
Former Avon	22.7	£931.0
Gloucestershire	18.2	£629.1
Somerset	21.4	£731.6
Wiltshire	17.8	£668.5

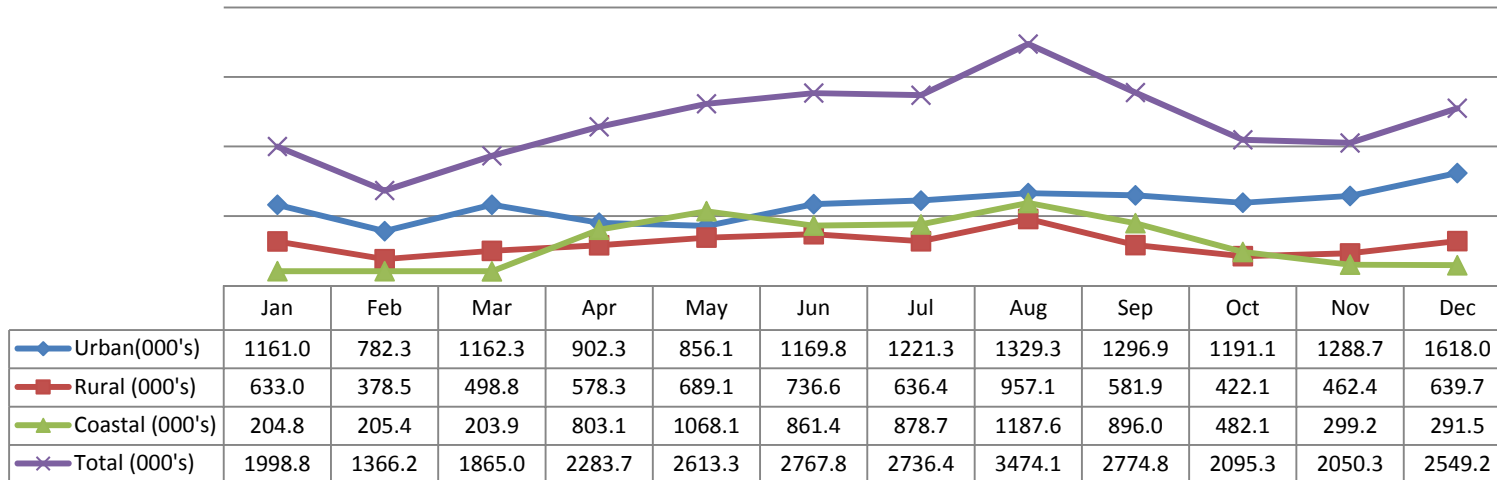
Devon - Day visits by location

Total day visits	Total day visit spend
28,575,000	£1,013,711,000

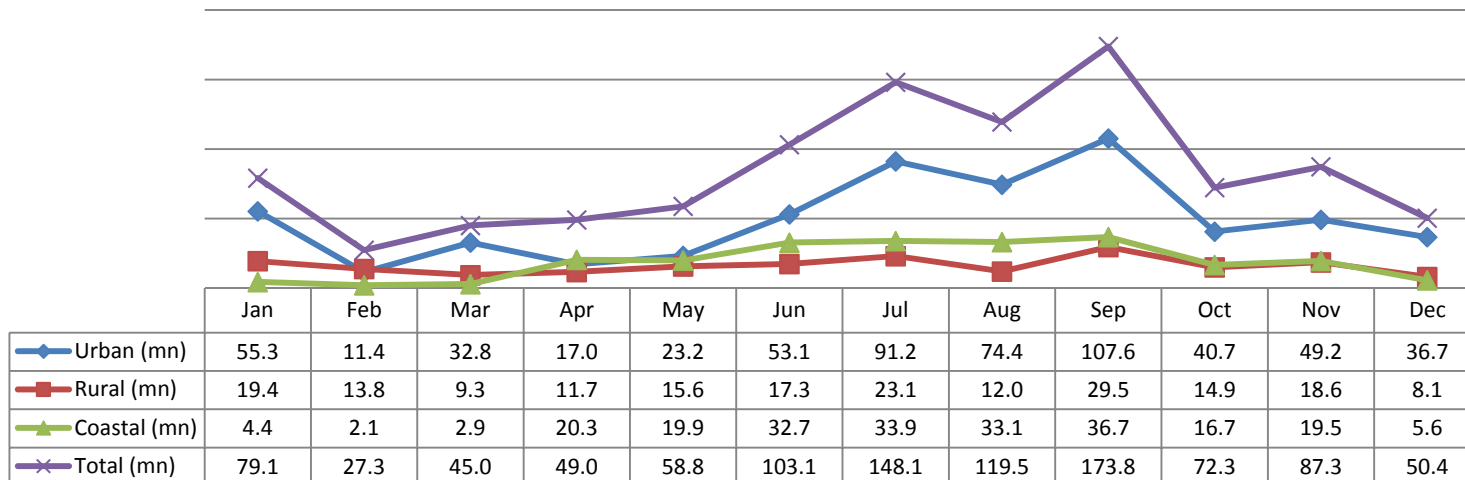


Devon - Estimated seasonality of day visits

Seasonality - day visits (000's)

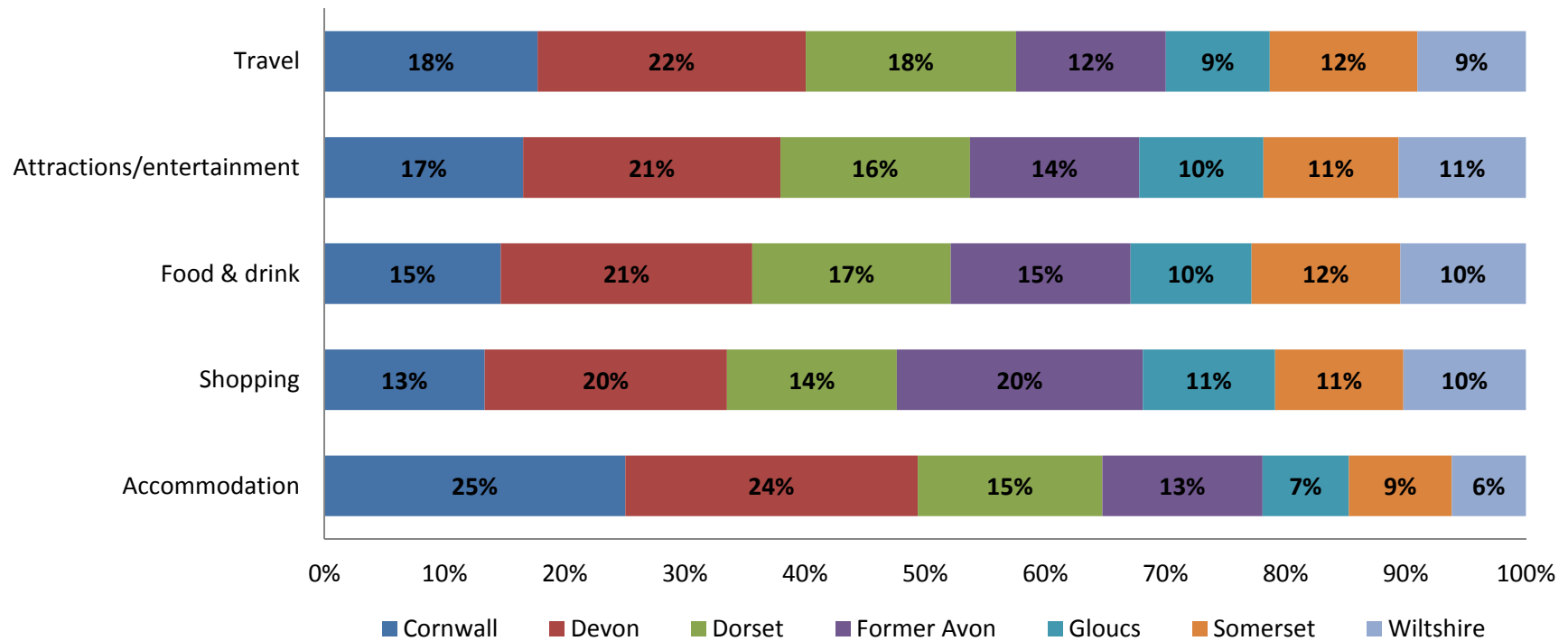


Seasonality - day visit spend (millions)



Devon – Direct visitor expenditure by category in the regional context

Devon	Accommodation	Shopping	Food & drink	Attractions/entertainment	Travel	TOTAL
Spend	£2,033,392,000	£2,603,534,000	£3,492,067,000	£1,241,401,000	£1,644,665,000	£11,015,059,000
%	18%	24%	32%	11%	15%	100%



Devon – Direct visitor expenditure by category



Accommodation

- UK staying visitors £438,229,000
- Overseas staying visitors £56,709,000



Shopping

- UK staying visitors £148,823,000
- Overseas staying visitors £56,134,000
- Day visitors £320,285,000



Food & drink

- UK staying visitors £261,880,000
- Overseas staying visitors £41,286,000
- Day visitors £428,183,000



Attractions/entertainment

- UK staying visitors £127,058,000
- Overseas staying visitors £22,919,000
- Day visitors £115,999,000



Travel

- UK staying visitors £199,728,000
- Overseas staying visitors £18,169,000
- Day visitors £149,243,000

Devon – Other visitor related expenditure by category



Second Homes

£8,175,000



Boats

£7,374,000



Visiting friends and relatives (non-visitor spend)

£71,756,000

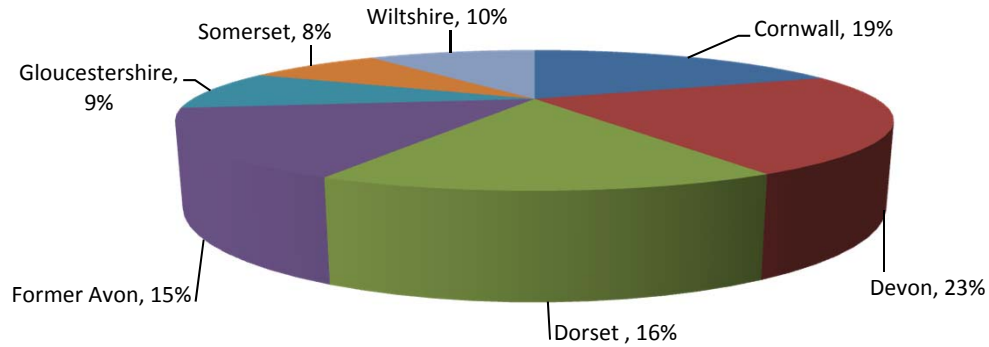
Devon – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£501,001,000	£8,564,000	£509,565,000
Retailing	£202,907,000	£317,082,000	£519,989,000
Catering	£294,070,000	£415,337,000	£709,407,000
Attractions/entertainment	£155,058,000	£123,484,000	£278,542,000
Transport	£130,738,000	£89,546,000	£220,284,000
Arising from non trip spend	£87,305,000	£0	£87,305,000
Total Direct	£1,371,079,000	£954,013,000	£2,325,092,000

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£1,371,079,000	£954,013,000	£2,325,092,000
Supplier and income induced	£770,434,000	£417,625,000	£1,188,059,000
Total	£2,141,513,000	£1,371,638,000	£3,513,151,000

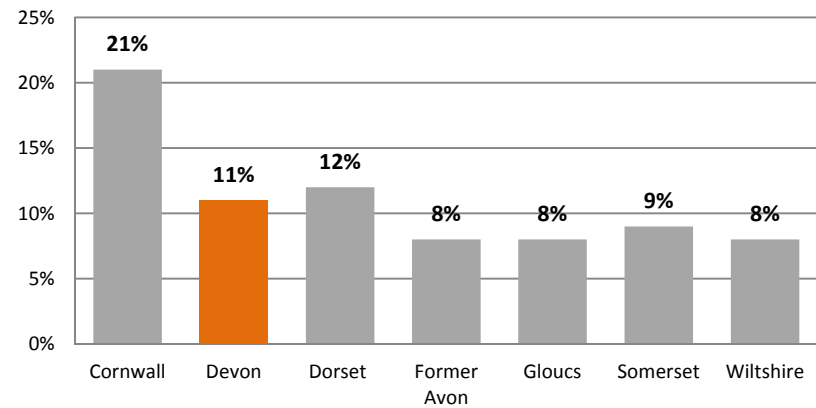
Devon – Tourism related employment in the regional context

Distribution of tourism related employment (FTE's)



Area	Number of FTE's
Cornwall	41,033
Devon	48,464
Dorset	33,638
Former Avon	33,257
Gloucestershire	19,409
Somerset	17,105
Wiltshire	21,774

% 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	8,149	139	8,288
Retailing	1,776	2,776	4,552
Catering	3,841	5,425	9,267
Attractions/entertainment	2,581	2,055	4,636
Transport	877	600	1,477
Arising from non trip spend	1,386	0	1,386
Total Direct	18,610	10,996	29,606