

# The Economic Impact of Devon's Visitor Economy 2016

## Devon and Districts

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



February 2018



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## Executive Summary – At a Glance

### Overview

This report provides an overview of tourism activity in Devon for 2016;

- Devon attracted approximately 35.6m day and staying trips with a total visitor related spend value of £2,454m supporting an approximate 63,000 tourism related jobs within the county.
- Total visitor related spend remained broadly similar to 2015.
- Devon received approximately 5.7m staying trips accounting for 23.6m visitor nights and £1,359m visitor spend with domestic visitors accounting for the large majority of staying trips (92%).
- Devon received approximately 30m day visits generating £1,041m in day visitor expenditure. Visits to urban locations represented the largest proportion of day visits to the county (48%) and generated the majority of day visit expenditure (57%).
- The 63,204 tourism related jobs in the county equated to 12% of all employment in Devon.
- 2016 staying trips, nights and spend all decreased slightly compared to 2015 although day visits increased by 5% with day visit spend increasing by 3%. Overall impact on the Devon economy remained at a broadly similar level to 2015.

	2011	2012	2013	2014	2015	2016
<b>Total Staying Visitor Trips (UK and overseas)</b>	5.635 million	5.647 million	5.652 million	5.565 million	5.754 million	5.689 million
<b>Total Staying Visitor Nights (UK and overseas)</b>	24.6 million	23.8 million	24 million	22.8 million	24.5 million	23.6 million
<b>Total Staying Visitor Spend (UK and overseas)</b>	£1,184 million	£1,358 million	£1,381 million	£1,290 million	£1,371 million	£1,359 million
<b>Total Day Visits</b>	29 million	30.8 million	31 million	29.8 million	28.6 million	29.9 million
<b>Total Day Visitor Spend</b>	£978.6 million	£1,037 million	£1,041 million	£1,016 million	£1,014 million	£1,041 million
<b>Total Visitor Related Spend</b>	£2,250 million	£2,498 million	£2,501 million	£2,380 million	£2,472 million	£2,454 million
<b>Total Tourism Supported Business Turnover</b>	£3,100 million	£3,609 million	£3,606 million	£3,402 million	£3,513 million	£3,482 million
<b>Total Employment Supported (actual)</b>	63,000	74,000	72,500	65,250	64,693	63,204
<b>% Of All Devon Employment</b>	12%	14%	14%	12%	11%	12%

# Executive Summary

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This report has been produced by The South West Research Company Ltd on behalf of the Devon Tourism Partnership and provides an overview of tourism activity in Devon for 2016 and comparisons with previous years and other areas. Figures for Devon county, local authority districts and unitary authorities participating in the project this year have been calculated using the Cambridge Model which has been used in the South West region for a number of years for this purpose.

## **Key points for 2016**

- Devon attracted approximately 35.6m day and staying trips with a total visitor related spend value of £2,454m supporting an approximate 63,000 tourism related jobs within the county.
- Devon received approximately 5.7m staying trips accounting for 23.6m visitor nights and £1,359m visitor spend with domestic visitors accounting for the large majority of staying trips (92%).
- Total visitor related spend remained broadly similar to 2015.
- Serviced accommodation was used by 31% of staying visitors with a further 31% choosing to stay at the home of a friend or relative.
- Holiday (81%) and business trips (10%) were the main purpose of the majority of trips to the county.
- In terms of seasonality; July, August and September were the top months for staying trips, nights and spend.
- Devon received approximately 30m day visits generating £1,041m in day visitor expenditure. Visits to urban locations represented the largest proportion of day visits to the county (48%) and generated the majority of day visit expenditure (57%).
- In terms of seasonality; May through to October were the top months for day visits and day visit expenditure.

# Executive Summary

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## **Key points for 2016**

- Devon attracted a total direct visitor expenditure of approximately £2.4 billion in 2016. Food and drink (31%), shopping (22%) and accommodation (21%) received the largest proportions of direct visitor expenditure in the county. In the regional visitor spend context Devon contributes 20% or more of South West spend in every sector.
- When direct, supplier and income induced rounds of expenditure are considered the total business turnover in Devon was equal to approximately £3.5bn.
- The 63,204 tourism related jobs in the county equated to 12% of all employment in Devon.

## **Looking ahead**

- As anticipated in the previous version of this report all visitor spend remained at similar levels in 2016 compared to 2015. Based upon the available data at the time of compiling this report it is anticipated that tourism spend in 2017 will again remain relatively stable with all visitor expenditure forecast to decrease slightly by 0.6% to £2,386 million with subsequent growth of 2.1% for each year thereafter to £2,597 million in 2021. This represents a growth of 11% in visitor spend over the forecast period (2016 to 2021).

# 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 Devon county in 2016. It also looks at trends in tourism across previous years in the county and the likely levels of tourism volume and value in the years ahead. 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.

The figures in this report were mainly 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. The model has been used in both Devon and the South West for many years with the version used since 2001 providing comparability across all South West districts and counties. Where figures have been used from alternative data sources this will be noted in the report.

For further information on the Cambridge Model and the terms used in this report please see Appendix 1 which accompanies this report.

## **England – 2016**

In 2016, British residents took 99.3 million overnight trips in England, totalling 288 million nights away from home and expenditure of £18.5 billion, with an average trip length of 2.90 nights. The number of domestic trips was 4% lower than in 2015.

44.7 million Holiday trips were taken in England in 2016. The number of holiday trips taken was on par with 2015. At 29.3 million, short breaks of 1-3 nights account for two-thirds of English holidays by volume. 15.4 million 4+ night holidays were taken. 14.1 million Overnight business trips were taken in England in 2016. The number of business trips was on par with 2015. The number of VFR trips taken declined by 9% in 2016, to 36.9 million.

Overseas trips to England increased by 4% compared to 2015 to a record £37.6 million and spend by 2% to £22.5 billion.

During 2016, GB residents took a total of 1,834 million Tourism Day Visits to destinations in England, Scotland or Wales, increasing by +5% compared to those taken in 2015 (1,754); and around £64 billion was spent during these trips, increasing by 3% year-on-year (£61.9 billion in 2015).

# Introduction

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## **The South West Region – 2016**

From a regional perspective the indications are that 2016 was a relatively good year for tourism in the South West despite a relatively slow start to the year with unsettled weather undoubtedly being a contributory factor during the February half term and Easter holiday periods. Peak season performance however remained very positive with increases in both visitors and turnover (compared to 2015) throughout the months of June to October and finishing off with a positive performance during December. Business optimism was at a good and relatively stable level throughout 2016 reflecting a steady year for the industry and in line with national tourism survey data.

The modelled regional data for 2016 which has been derived from the national surveys, although differs from published data for the South West, estimates that;

- In terms of UK staying visitors the South West witnessed an increase of 2% in terms of trips, although nights and spend decreased by 1% in each case.
- Overseas trips to the region increased by 5%, nights increased by 3% and spend increased by 6% compared to 2015.
- Day visits to the South West are estimated to have increased by 4% and day visit spend increased by 2% compared to 2015. Visits to urban areas increased by 3%, visits to rural areas increased by 7% and visits to coastal areas increased by 4% compared to 2015. Spend in urban and rural areas remained at a similar level to 2015 although coastal day visit spend increased by 14%.

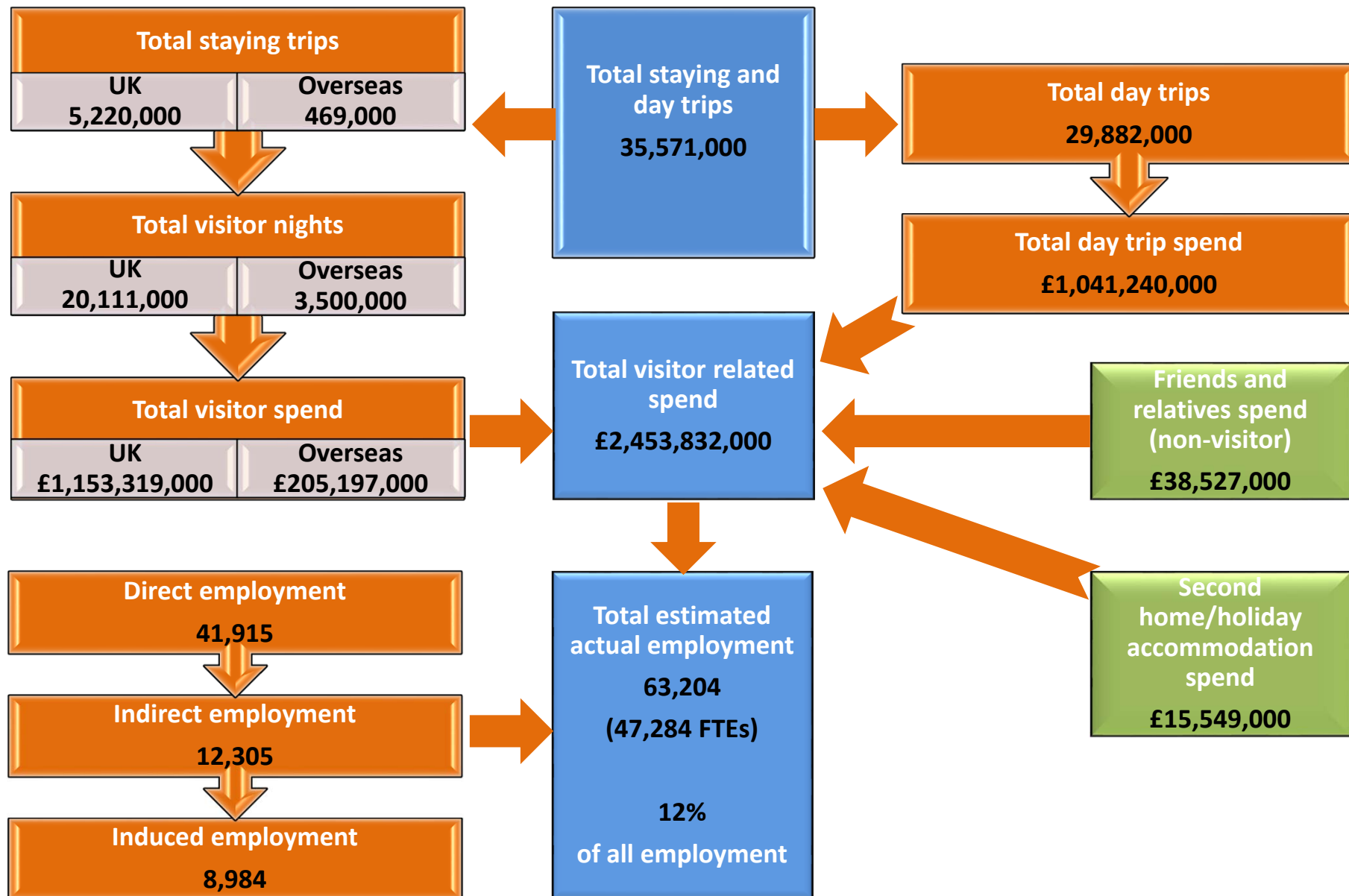
For an overview of 2016, including key facts about the economy, weather and key events please see Appendix 2 which accompanies this report.

Devon 2016





## Devon - Key facts at a glance

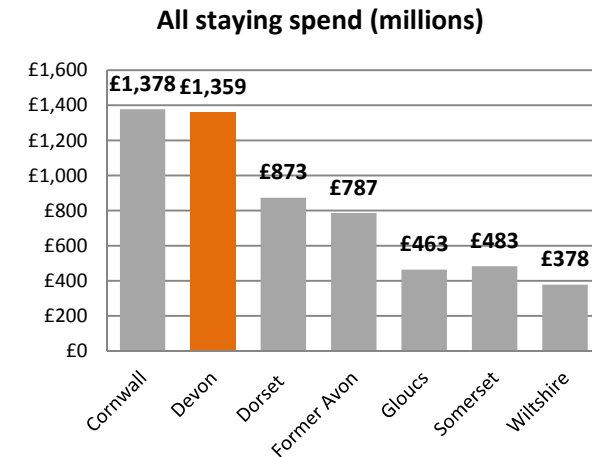
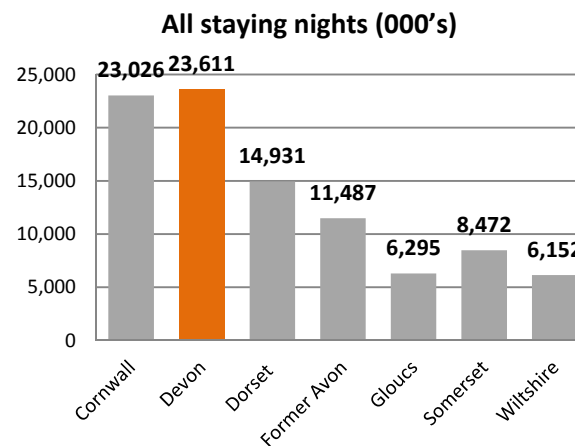
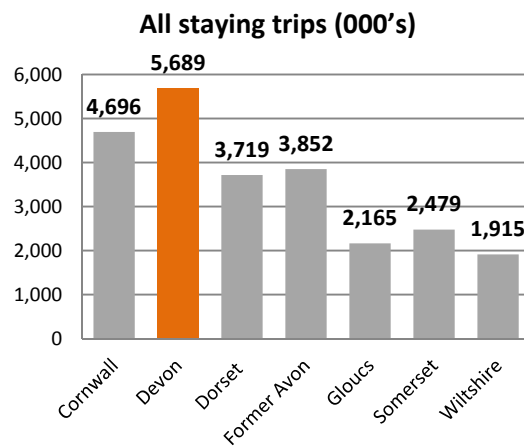


## Devon – Staying visits

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Information on staying visits within the county of Devon 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.

## 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	4,350	346	20,640	2,386	£1,239	£138
Devon	5,220	469	20,111	3,500	£1,153	£205
Dorset	3,357	362	11,613	3,318	£665	£208
Former Avon	2,943	909	6,240	5,247	£486	£301
Gloucestershire	1,877	288	4,500	1,795	£342	£121
Somerset	2,259	220	6,962	1,510	£401	£82
Wiltshire	1,611	304	4,316	1,836	£271	£106

In 2016 Devon attracted approximately 5.7 million staying visitor trips equating to approximately 24 million visitor nights and contributing £1,359 million to the county economy. Within the regional context Devon was the largest county in terms of the number of staying visitor trips and nights and accounted for 23% of all staying trips, 25% of all staying nights and 24% of spend in the South West.

Staying visitor activity accounted for 57% of all direct visitor expenditure in Devon.

## Devon - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	1,592,000	4,508,000	£434,969,000
Self catering	420,000	2,361,000	£186,339,000
Touring caravans /tents	566,000	2,738,000	£99,457,000
Static vans/holiday centres	780,000	3,729,000	£198,618,000
Group/campus	82,000	207,000	£10,254,000
Paying guest in private homes	0	0	£0
Second homes	114,000	615,000	£22,937,000
Boat moorings	24,000	111,000	£5,144,000
Other	48,000	140,000	£6,955,000
Staying with friends and relatives	1,594,000	5,702,000	£188,646,000
Total	5,220,000	20,111,000	£1,153,319,000

Overseas tourists	Trips	Nights	Spend
Serviced	194,000	727,000	£72,794,000
Self catering	20,000	229,000	£14,530,000
Touring caravans /tents	24,000	115,000	£5,198,000
Static vans/holiday centres	4,000	21,000	£1,222,000
Group/campus	22,000	447,000	£34,559,000
Paying guest in private homes	18,000	349,000	£17,656,000
Second homes	4,000	62,000	£3,374,000
Boat moorings	0	0	£0
Other	17,000	99,000	£2,489,000
Staying with friends and relatives	166,000	1,450,000	£53,375,000
Total	469,000	3,500,000	£205,197,000

Serviced accommodation accounted for 31% of all staying trips (also 31% in 2015), 22% of staying nights (21% in 2015) and 37% of staying spend to the county overall (36% in 2015). Similar to serviced accommodation, staying with friends and relatives also accounted for 31% of all staying trips, although accounted for a larger proportion of staying nights (30%) but only 18% of staying spend. The next largest proportions were in the Static vans/holiday centre sector which accounted for 14% of staying trips, 16% of staying nights and 15% of staying spend.

## Devon – Key measures by accommodation type

Domestic tourists	Average nights per trip	Average spend per trip	Average spend per night
Serviced	2.83	£273.22	£96.49
Self catering	5.62	£443.66	£78.92
Touring caravans /tents	4.84	£175.72	£36.32
Static vans/holiday centres	4.78	£254.64	£53.26
Group/campus	2.52	£125.05	£49.54
Second homes	5.39	£201.20	£37.30
Boat moorings	4.63	£214.33	£46.34
Other	2.92	£144.90	£49.68
Staying with friends and relatives	3.58	£118.35	£33.08
Total	3.85	£220.94	£57.35

Overseas tourists	Average nights per trip	Average spend per trip	Average spend per night
Serviced	3.75	£375.23	£100.13
Self catering	11.45	£726.50	£63.45
Touring caravans /tents	4.79	£216.58	£45.20
Static vans/holiday centres	5.25	£305.50	£58.19
Group/campus	20.32	£1,570.86	£77.31
Paying guest in private homes	19.39	£980.89	£50.59
Second homes	15.50	£843.50	£54.42
Other	5.82	£146.41	£25.14
Staying with friends and relatives	8.73	£321.54	£36.81
Total	7.46	£437.52	£58.63

The above tables provide a breakdown of the average nights per trip, average spend per trip and average spend per night by accommodation type. Whilst there are potential limitations with the breakdown of data to this level of detail the figures still provide a good indication of the differentials between the accommodation types. It should be remembered that the spend figures refer to all spend associated with visitors staying in the various types of accommodation.

Overall domestic and overseas visitors spent broadly similar levels per night in the county (£57.35 for a domestic visitor compared to £58.63 for an overseas visitor) although overseas visitors had a longer length of stay in the county so their average spend per trip was higher than domestic visitors.

## Devon - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	4,389,000	17,849,000	£991,881,000
Business	384,000	1,006,000	£92,661,000
Visits to friends and relatives	331,000	900,000	£45,052,000
Other	115,000	355,000	£23,724,000
Study	0	0	£0
<b>Total</b>	<b>5,220,000</b>	<b>20,111,000</b>	<b>£1,153,319,000</b>

Overseas tourists	Trips	Nights	Spend
Holiday	191,000	1,055,000	£74,415,000
Business	204,000	1,538,000	£71,331,000
Visits to friends and relatives	54,000	255,000	£20,251,000
Other	10,000	145,000	£4,454,000
Study	11,000	508,000	£34,745,000
<b>Total</b>	<b>469,000</b>	<b>3,500,000</b>	<b>£205,197,000</b>

When staying visits are analysed by the main purpose of trip holiday visits were the key driver for the majority of trips to Devon.

### Overall proportions of volume and value by purpose:

Holiday – 81% of all trips, 80% of all nights and 78% of all spend.

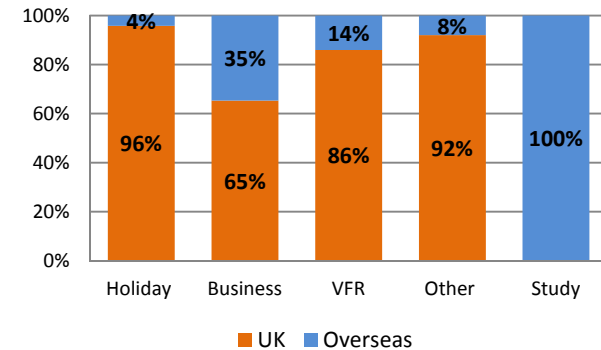
Business – 10% of all trips, 11% of all nights and 12% of all spend.

VFR – 7% of all trips, 5% of all nights and 5% of all spend.

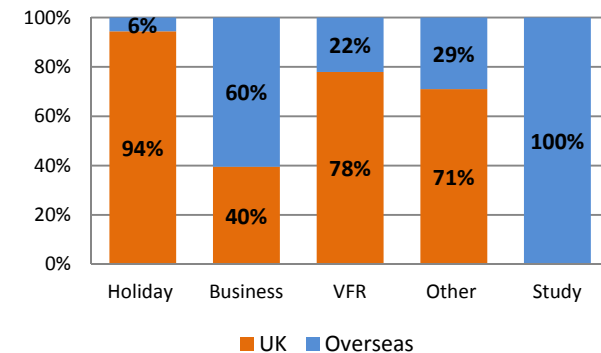
Other – 2% of all trips, 2% of all nights and 2% of all spend.

Study – Less than 1% of all trips, 2% of nights and 3% of all spend.

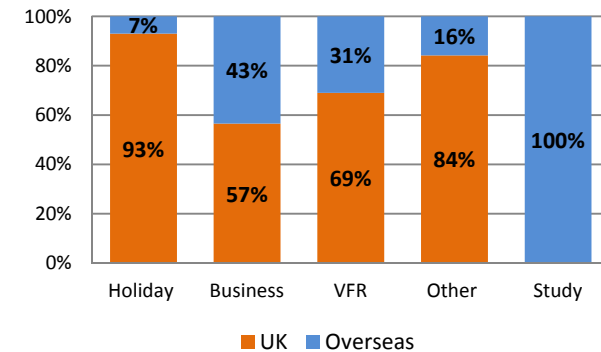
**Trips**



**Nights**



**Spend**



## Devon – Key measures by purpose

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Domestic tourists	Average nights per trip	Average spend per trip	Average spend per night
Holiday	4.07	£225.99	£55.57
Business	2.62	£241.30	£92.11
Visits to friends and relatives	2.72	£136.11	£50.06
Other	3.09	£206.30	£66.83
Total	3.85	£220.94	£57.35

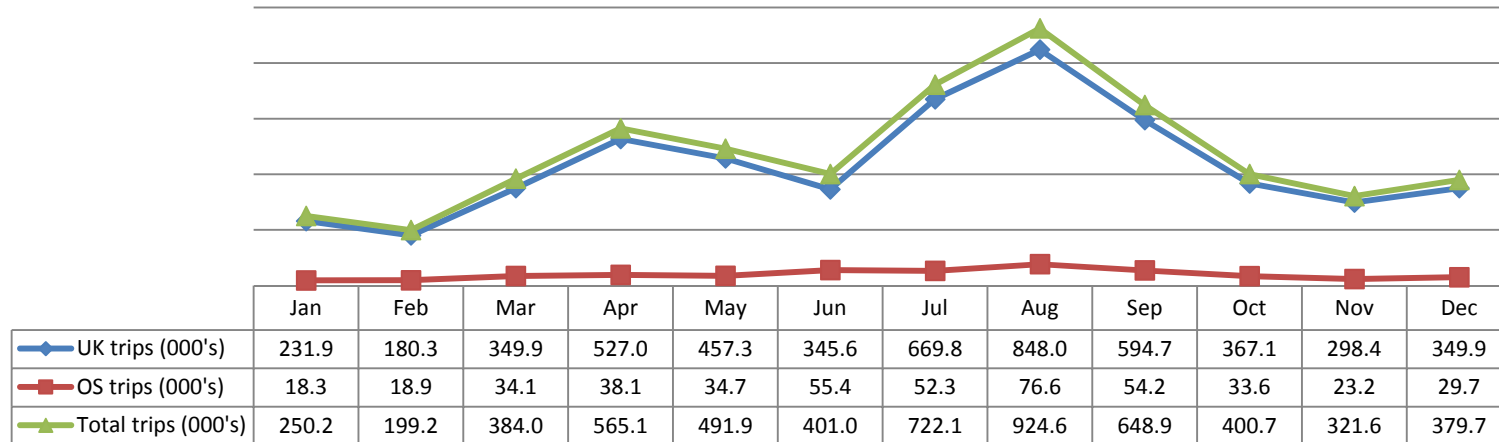
Overseas tourists	Average nights per trip	Average spend per trip	Average spend per night
Holiday	5.52	£389.61	£70.54
Business	7.54	£349.66	£46.38
Visits to friends and relatives	4.72	£375.02	£79.42
Other	14.50	£445.40	£30.72
Study	46.18	£3,158.64	£68.40
Total	7.46	£437.52	£58.63

Amongst domestic tourists holiday visitors had the longest length of stay in the county (4.07 nights) although business visitors spent the most per trip (£241.30) and per night (£92.11).

The longest length of stay amongst overseas tourists in Devon was for those on a study trip (46.18 nights) who also had the highest average spend per trip (£3,158.64). Overseas visitors visiting friends and relatives spent the most per night during their stay (£79.42)

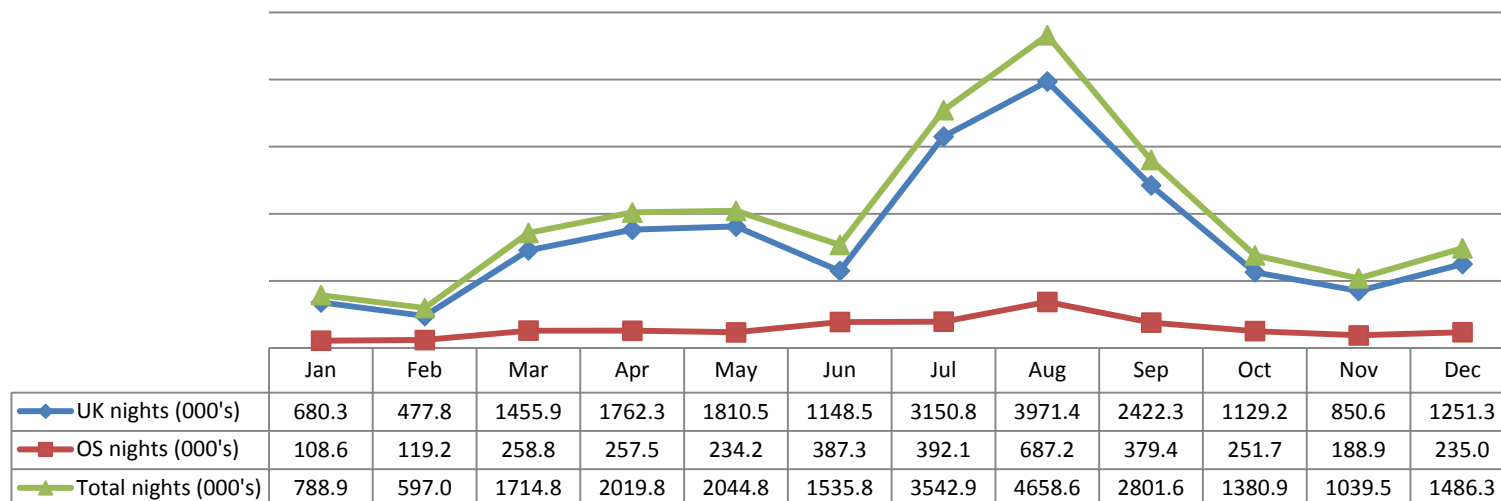
## Devon - Estimated seasonality of staying visits

Seasonality - trips



With Easter falling late in March, and into April in school holiday terms, April provided an early spike in numbers of trips. Away from this the peak months of July, August and September produced the largest trip volumes.

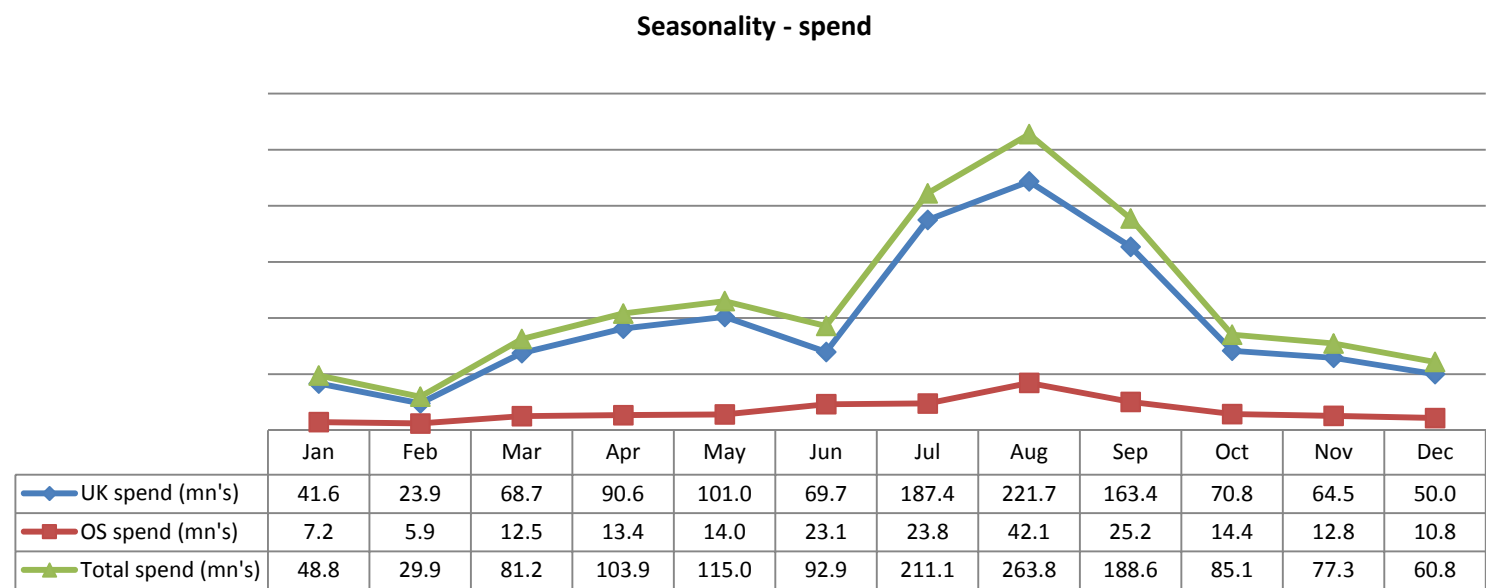
Seasonality - nights



July, August and September were again the key months for the volume of staying visitor nights and clearly display the popularity of and reliance on the peak season in supporting the industry in the county. Whilst April was a key month for trips the significance is not as great in terms of nights, highlighting the short break nature of trips in the month.

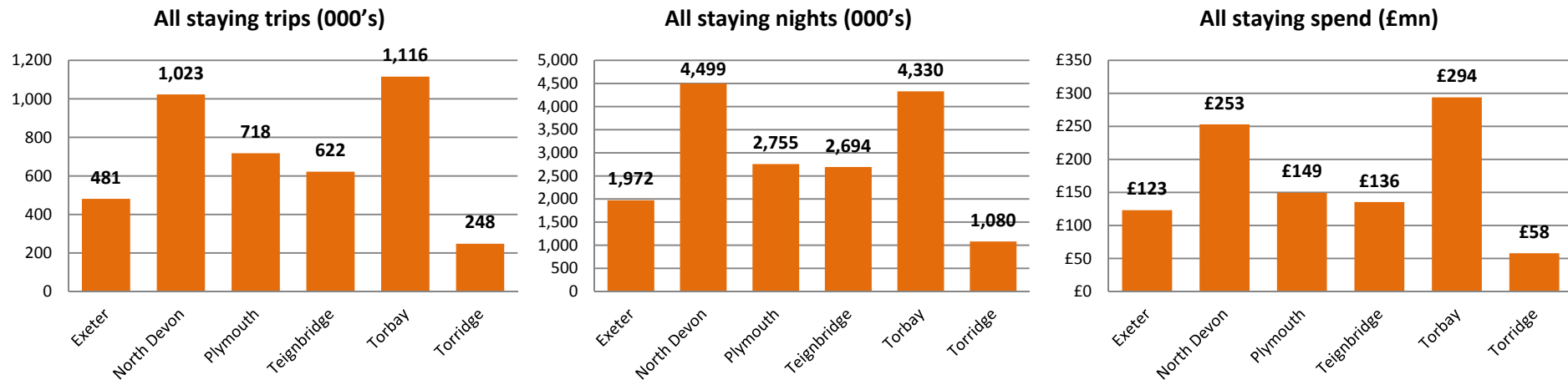


# Devon - Estimated seasonality of staying visits



The seasonality of visitor spend closely follows the trend displayed for staying nights with the largest volumes again being in July, August and September.

## 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)
Exeter	422	59	1,375	597	£84	£39
North Devon	965	58	4,139	360	£231	£22
Plymouth	640	78	2,120	635	£114	£36
Teignbridge	584	38	2,432	262	£122	£13
Torbay	1,021	95	3,750	580	£255	£39
Torridge	229	19	939	141	£51	£7

Of the Devon district areas participating in this project Torbay and North Devon were again the largest in the county by some margin in terms of staying visitor trips, nights and spend. The two districts combined accounted for 38% of all staying visitor trips, 37% of all nights and 40% of all spend during 2015 in Devon.

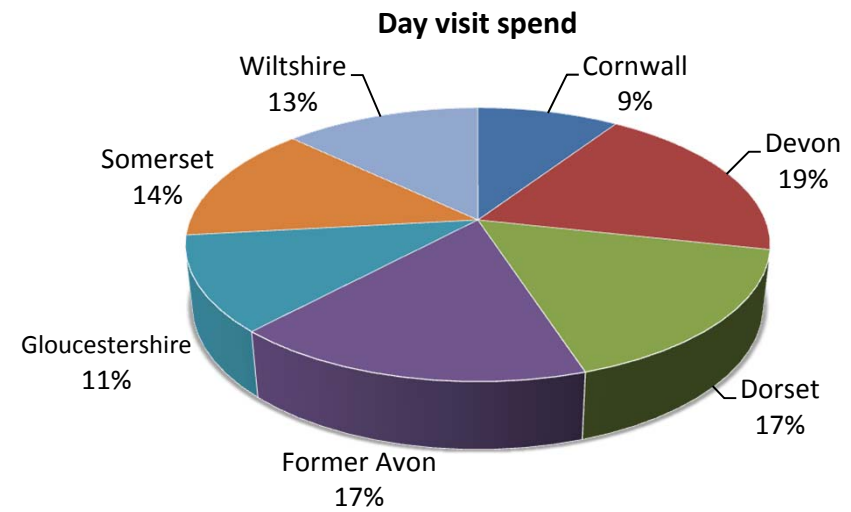
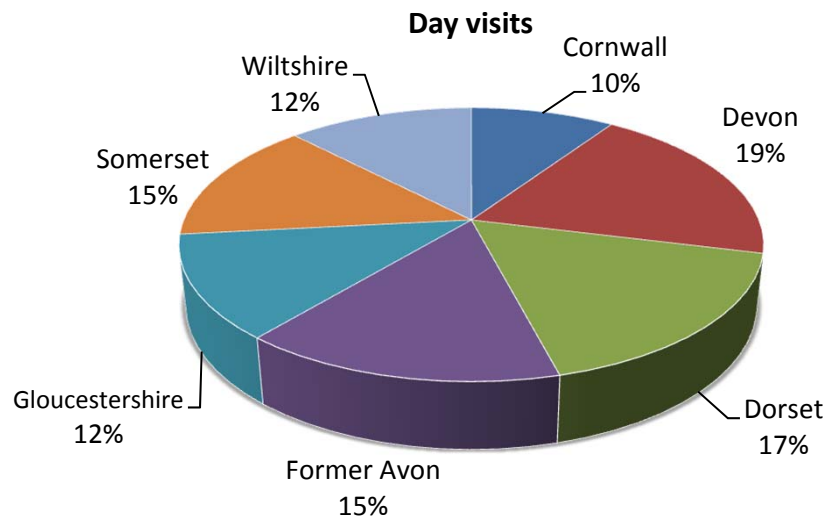
## Devon – Day visits

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Information on day visits within this report has been derived from the 2016 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.

## Devon - Day visits in the regional context

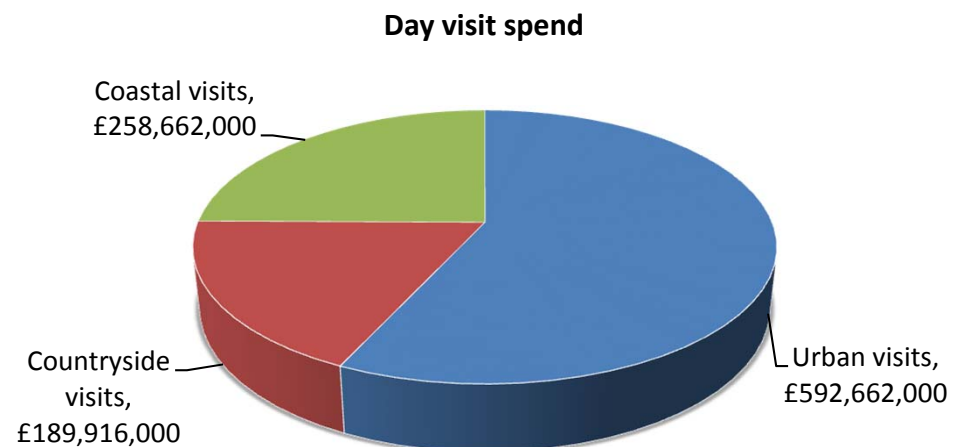
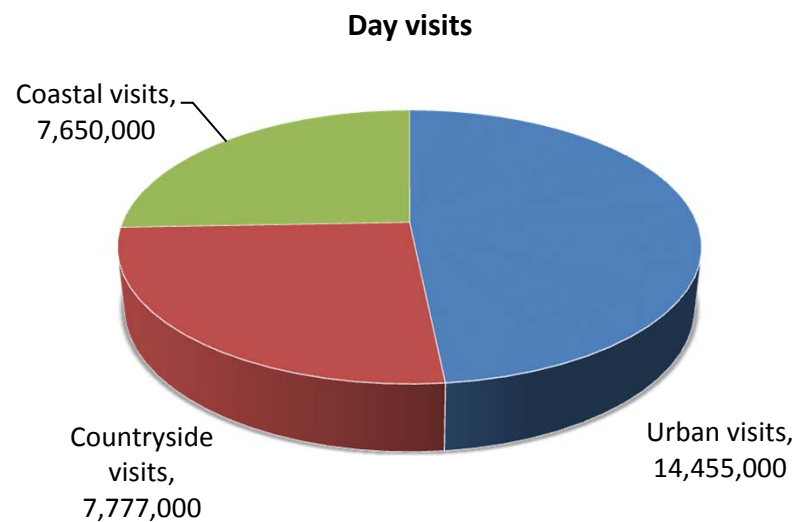


Area	Day visits (millions)	Day visit spend (millions)
Cornwall	14.5	£505.5
Devon	29.9	£1,041.2
Dorset	26.2	£899.8
Former Avon	23.3	£921.5
Gloucestershire	18.8	£613.4
Somerset	22.2	£754.9
Wiltshire	18.8	£700.8

Within the context of the South West total day visits Devon received 19% of all day visits and day visit spend equating to 29.9 million trips and in excess of £1 billion spend. Devon was again the largest regional county in terms of the volume and value of day visits during 2016.

## Devon - Day visits by location

Total day visits	Total day visit spend
29,882,000	£1,041,240,000

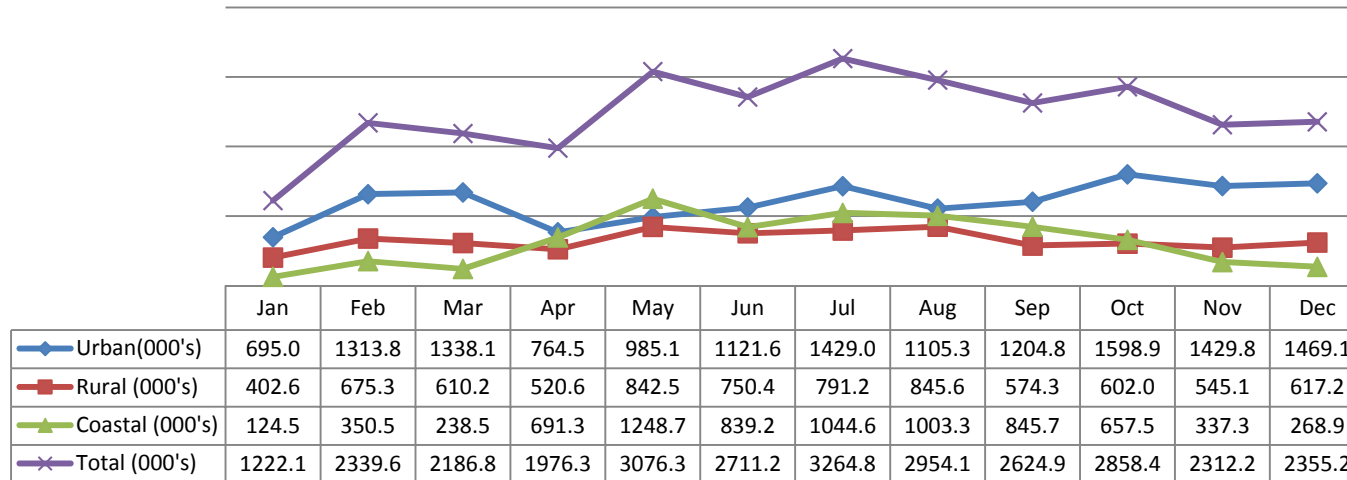


The largest proportion of day visits in Devon were to urban locations (48% in 2016 compared to 50% in 2015) accounting for approximately 57% of day visit expenditure (58% in 2015). Countryside visits accounted for 26% of visits and 18% of expenditure (25% and 19% respectively in 2015) whilst coastal visits accounted for 26% of visits and 25% of expenditure (26% and 22% respectively in 2015).

Day visitor activity accounted for 43% of all direct visitor spend in Devon.

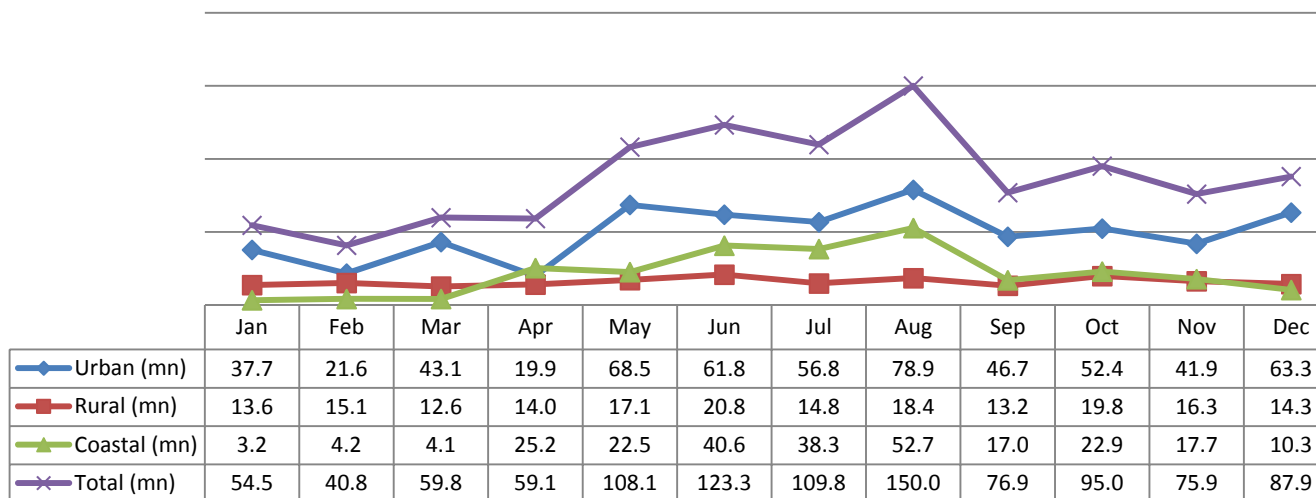
## Devon - Estimated seasonality of day visits

Seasonality - day visits (000's)



Day visits were far more evenly distributed across the year than staying visits. However, the largest volumes occurred from May through to October.

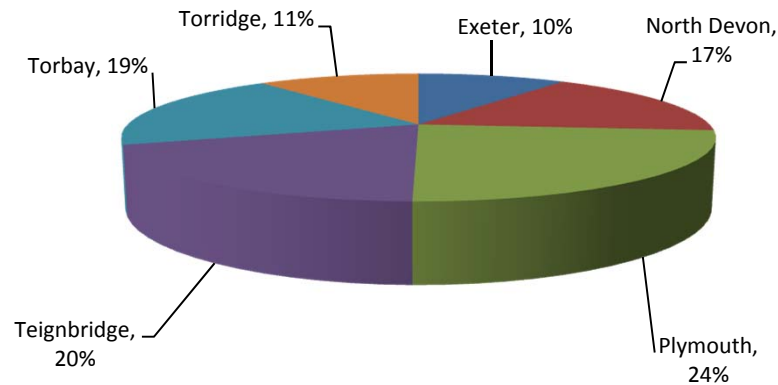
Seasonality - day visit spend (millions)



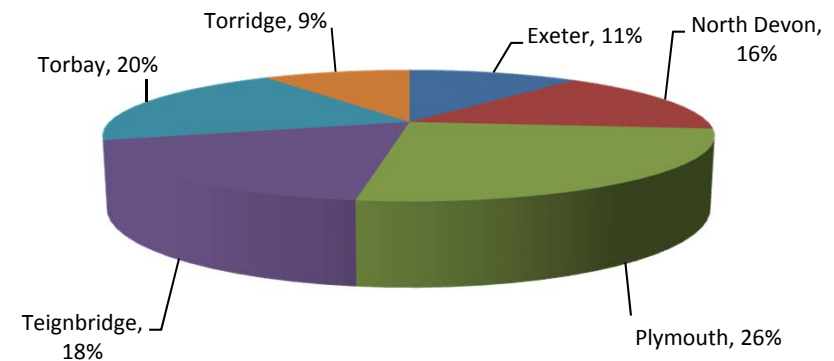
The spread of day visitor expenditure across the year also indicates that May through to October were the key months, although November and December also feature more heavily in terms of spend in the run up to Christmas.

## Devon - Day visits in the county context

All day visits



All day visit spend



Area	Day visits	Day visit spend
Exeter	1.8	£74.0
North Devon	3.1	£105.0
Plymouth	4.4	£172.3
Teignbridge	3.6	£123.1
Torbay	3.6	£133.8
Torridge	2.0	£63.8

Plymouth again attracted the largest volumes of day visits and day visitor spend amongst the areas in Devon. This is likely to be driven by a number of factors including having a larger population than other areas, a larger retail offering and being an urban area but located in a coastal location and having a more diverse product offering as a result. Plymouth accounted for 24% of all day visits in the county and 26% of all day visit expenditure.

Teignbridge and Torbay (3.6 million visits each) were the next largest Devon districts in terms of the volume of day visits received in 2016 amongst those participating in the project.

## Devon - 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

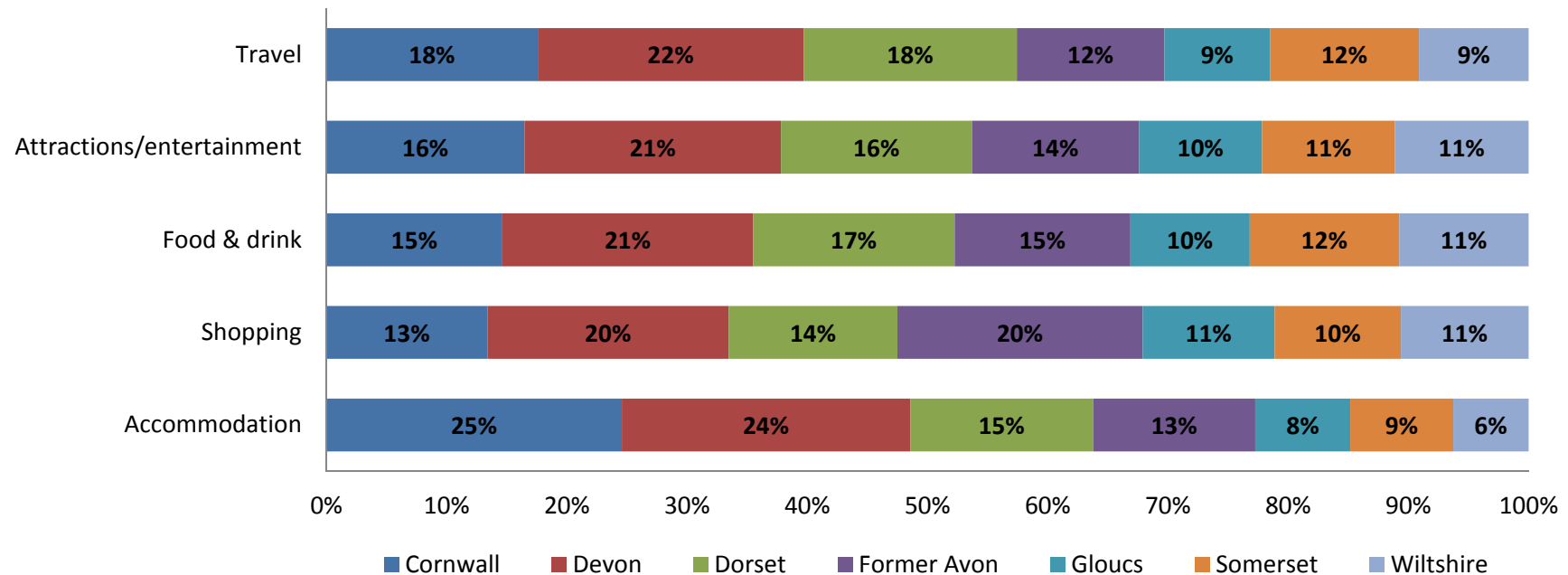
The following pages look at the breakdown of this expenditure within Devon and business turnover arising from this expenditure.

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.



## Devon – Direct visitor expenditure by category in the regional context

Devon	Accommodation	Shopping	Food & drink	Attractions/entertainment	Travel	TOTAL
<b>Spend</b>	£506,647,000	£519,312,000	£739,481,000	£264,304,000	£370,011,000	£2,399,755,000
<b>%</b>	21%	22%	31%	11%	15%	100%



Devon attracted a total direct visitor expenditure of approximately £2.4 billion in 2016. Food and drink (31%), shopping (22%) and accommodation (21%) received the largest proportions of direct visitor expenditure in the county. In the regional visitor spend context Devon contributes 20% or more of South West spend in every sector. The breakdown of expenditure in each of the sectors by visitor type is shown on the following page.

## Devon – Direct visitor expenditure by category



### Accommodation

- UK staying visitors £434,880,000
- Overseas staying visitors £71,767,000



### Shopping

- UK staying visitors £145,262,000
- Overseas staying visitors £51,266,000
- Day visitors £322,784,000



### Food & drink

- UK staying visitors £255,310,000
- Overseas staying visitors £41,515,000
- Day visitors £442,656,000



### Attractions/entertainment

- UK staying visitors £123,738,000
- Overseas staying visitors £21,900,000
- Day visitors £118,666,000



### Travel

- UK staying visitors £194,129,000
- Overseas staying visitors £18,750,000
- Day visitors £157,132,000

## Devon – Other visitor related expenditure by category



Second Homes

£8,175,000



Boats

£7,374,000



Visiting friends and relatives (non-visitor spend)

£38,527,000

Additional visitor related expenditure arises from;

- 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.

This generated a further £54.1 million in Devon giving a total visitor related spend of approximately £2.5 billion in 2016.

## Devon – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£512,583,000	£8,853,000	£521,436,000
Retailing	£194,563,000	£319,557,000	£514,120,000
Catering	£287,919,000	£429,377,000	£717,296,000
Attractions/entertainment	£150,571,000	£126,321,000	£276,892,000
Transport	£127,727,000	£94,279,000	£222,006,000
Arising from non trip spend	£54,076,000	£0	£54,076,000
<b>Total Direct</b>	<b>£1,327,439,000</b>	<b>£978,387,000</b>	<b>£2,305,826,000</b>

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£1,327,439,000	£978,387,000	£2,305,826,000
Supplier and income induced	£745,894,000	£430,620,000	£1,176,514,000
<b>Total</b>	<b>£2,073,333,000</b>	<b>£1,409,007,000</b>	<b>£3,482,340,000</b>

Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending.

Direct visitor related expenditure in Devon in 2016 provided approximately £2.3 billion pounds business turnover in the county (after reductions to travel and transport spend - It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination).

The largest proportions of this fell within the Catering, Accommodation and Retail sectors with the majority of the Catering and Retail business turnover supported by day visitors to the county.

When the purchase of services locally and spending of wages by employees whose jobs are supported by tourism spending is calculated (supplier and income induced turnover) the total estimated business turnover in Devon arising as a result of visitor activity is an approximate £3.5 billion pounds.

## Devon – 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 of facilities from entrance charges. Therefore an additional percentage of direct employment is added to the attractions sector estimates to take account of this factor.

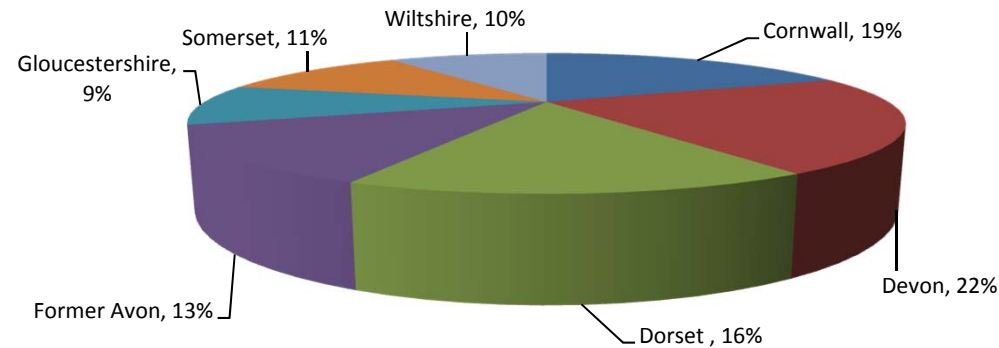
This section of the report looks at employment on three levels;

- **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).

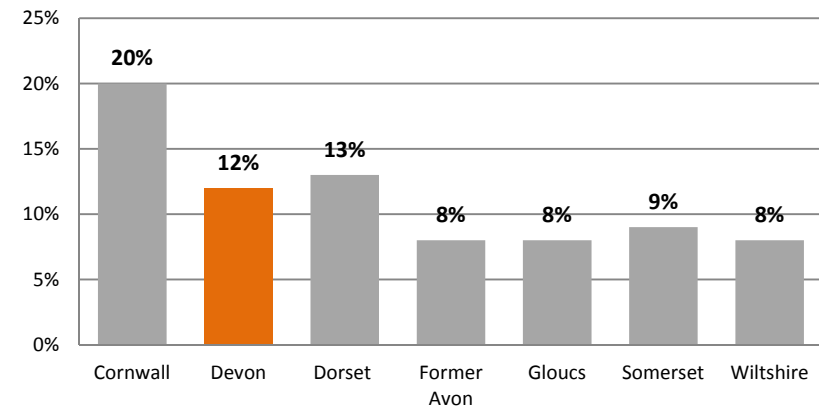
## Devon – Tourism related employment in the regional context

Distribution of tourism related employment (FTE's)



Area	Number of FTE's
Cornwall	40,386
Devon	47,284
Dorset	34,223
Former Avon	27,854
Gloucestershire	19,991
Somerset	24,305
Wiltshire	20,655

% of all county employment



Devon (22%) had the largest proportion of tourism related employment (FTE's) in the context of the total tourism employment amongst the South West counties. This equated to approximately 47,300 tourism related FTE's in Devon and 12% of all employment in the county.

# 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	7,426	128	7,554
Retailing	1,662	2,730	4,392
Catering	3,938	5,873	9,811
Attractions/entertainment	2,480	2,080	4,560
Transport	825	609	1,434
Arising from non trip spend	858	0	858
<b>Total Direct</b>	<b>17,189</b>	<b>11,420</b>	<b>28,610</b>

There were approximately 63,200 actual tourism related jobs within Devon during 2016. 66% of the estimated actual employment was supported by direct visitor expenditure.

A further 19% of estimated actual employment was categorised as indirect and supported by the spending of businesses in receipt of direct visitor expenditure to purchase local supplies and services. 14% of estimated actual jobs were categorised as induced which are supported by the spending of employees whose jobs are supported by tourism expenditure.

The distribution of direct FTE employment amongst businesses in receipt of visitor expenditure shows the largest proportion of FTE's arising in the Catering sector (9,811 jobs – 34% of all FTE's). Accommodation (7,544 jobs – 26% of all FTE's) was the next largest sector in terms of the numbers of FTE employment from direct visitor expenditure.

## Comparisons with previous years

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This section looks at Devon top line staying visitor data between 2006 and 2016 to try and gain an insight into any trends emerging from the figures. Devon county figures within this section are derived directly from the relevant national tourism surveys, although adjusted to account for local data, and it is important to consider the limitations of survey data at this geographical level and the potential margins of error when interpreting the data. Ideally we would encourage the collection of local data to be used alongside these figures to aid with interpretation.

This section only includes day visits data from 2011 onwards as data prior to this is not comparable due to methodology changes in the national surveys that collected this information.



## Comparisons with previous years – Devon Domestic Staying Trips

Year	Trips	Year on year % change	% Change from base year
2006	5,129,000		
2007	5,627,000	10%	
2008	4,767,000	-15%	-7%
2009	5,270,000	11%	3%
2010	5,050,000	-4%	-2%
2011	5,210,000	3%	2%
2012	5,260,000	1%	3%
2013	5,116,000	-3%	0%
2014	5,121,000	0%	0%
2015	5,290,000	3%	3%
2016	5,220,000	-1%	2%

### Devon domestic staying trips

In terms of domestic trips the peak years for Devon were 2007 and 2009 and as a result Devon saw decreases in domestic tourism trips in 2008 and 2010. 2011 and 2012 witnessed year on year growth and the levels of domestic trips in 2012 were at a similar level to the 'staycation' year of 2009. Whilst, 2013 saw a small decrease in the number of domestic trips to the county (-3%), with similar levels of trips during 2014, in 2015 there was a 3% increase bringing trip levels back similar to those experienced in 2012 and 2009. The volume of domestic trips in 2016 remained at a broadly similar level to 2015 (-1%) and 2% above the base year of 2006.

Broadly speaking domestic trips in the county have shown relative stability since 2011.

## Comparisons with previous years – Devon Domestic Staying Nights

Year	Nights	Year on year % change	% Change from base year
2006	20,083,000		
2007	23,246,000	16%	
2008	18,346,000	-21%	-9%
2009	20,980,000	14%	4%
2010	21,570,000	3%	7%
2011	20,850,000	-3%	4%
2012	20,250,000	-3%	1%
2013	19,590,000	-3%	-2%
2014	19,687,000	0%	-2%
2015	21,029,000	7%	5%
2016	20,111,000	-4%	0%

### Devon domestic staying nights

In terms of domestic nights the peak years for Devon were also 2007 and 2009 and as a result Devon saw decreases in domestic tourism nights in 2008 although visitor nights in 2010 saw an increase of 3% compared to 2009 even though trips decreased in this year. 2011 and 2012 witnessed year on year decreases indicating a decreasing length of stay in the county as domestic visitor trips had increased over this period. 2013 also recorded a decrease in domestic visitor trips and nights (-3%) although the average length of stay remained at a similar level to 2012. In 2014 domestic visitor nights remained at a similar level although 2015 witnessed a 7% increase, the first increase in the volume of nights seen in the county since 2010 and the third highest volume in the analysis period of 2006 to 2015. In 2016 domestic nights decreased by 4% although within what could be assumed as the normal range based on previous years data and similar to the base year of 2006.

## Comparisons with previous years – Devon Domestic Staying Spend

Year	Spend	Year on year % change	% Change from base year
2006	£909,000,000		
2007	£1,161,976,000	28%	
2008	£931,240,000	-20%	2%
2009	£1,036,000,000	11%	14%
2010	£998,221,000	-4%	10%
2011	£1,000,999,000	0%	10%
2012	£1,157,000,000	16%	27%
2013	£1,122,292,000	-3%	23%
2014	£1,097,452,000	-2%	21%
2015	£1,175,718,000	7%	29%
2016	£1,153,319,000	-2%	27%

### Devon domestic staying spend

Generally speaking, domestic spend follows a similar pattern to trips with the peak years for Devon being 2007 and 2009 and decreases following these years. Domestic staying spend remained level in 2011 but increased by 16% in 2012 compared to 2011. Perhaps unsurprisingly after such a large increase in 2012, domestic staying spend decreased by 3% in 2013 although witnessed a further decrease of 2% in 2014. This trend was reversed in 2015 with the same proportionate increase of 7% as was evident for visitor nights. 2016 witnessed a small decrease in domestic visitor spend of -2% compared to 2015, although this is linked to the decreased volume of visitor nights rather than an actual decrease in spend per night which increased from £55.91 in 2015 to £57.35 in 2016.

The data suggests that overall the value of domestic spend in 2016 has increased by 27% from the base year of 2006 although it should be noted that data from the Great Britain Tourism Survey (GBTS) is not adjusted to account for inflation.

## Comparisons with previous years – Devon Overseas Staying Trips

Year	Trips	Year on year % change	% Change from base year
2006	501,000		
2007	430,000	-14%	
2008	488,000	13%	-3%
2009	468,000	-4%	-7%
2010	441,000	-6%	-12%
2011	425,000	-4%	-15%
2012	387,000	-9%	-23%
2013	536,000	39%	7%
2014	444,000	-17%	-11%
2015	464,000	5%	-7%
2016	469,000	1%	-6%

### Devon overseas staying trips

In terms of overseas trips the peak years for Devon were 2006 and 2008. In between those years 2007 saw decreased visitor numbers compared to 2006 and there has been a steady decline in overseas staying trips post 2008 with year on year decreases recorded.

However, in contrast, 2013 IPS data estimated a large increase in overseas staying trips to Devon (+39%) with volumes of trips being at their highest in the eight year period (536,000). Perhaps unsurprisingly, overseas staying trips decreased by 17% in 2014 compared to the record breaking year of 2013 suggesting that increased trip volumes in the year happened by chance or were a result of survey sampling and margins of error. That said, overseas trip levels in 2014 were still at a good level and were increased by 5% in 2015 and a further 1% in 2016 to 469,000 and trip volumes display stability in recent years.

Overall the volume of overseas trips in 2016 had decreased by 6% from the base year of 2006.

## Comparisons with previous years – Devon Overseas Staying Nights

Year	Nights	Year on year % change	% Change from base year
2006	4,203,000		
2007	2,900,000	-31%	
2008	4,532,000	56%	8%
2009	3,742,000	-17%	-11%
2010	3,243,000	-13%	-23%
2011	3,721,000	15%	-11%
2012	3,551,000	-5%	-16%
2013	4,391,000	24%	4%
2014	3,120,000	-29%	-26%
2015	3,496,000	12%	-17%
2016	3,500,000	0%	-17%

### Devon overseas staying nights

The trend for overseas visitor nights follows a similar pattern to overseas trips, although 2011 did show a 15% increase on 2010 for overseas nights whilst there was a decrease in overseas trips. In 2013 a 24% increase in overseas visitor nights was estimated for Devon which again is the highest level recorded for the eight year analysis period (approximately 4.4 million nights), however, this was followed by a 29% decrease estimated for 2014 to 3.1 million nights. This is the second lowest year for overseas staying nights during the analysis period and represents a change in the average length of stay from 8.19 nights per trip in 2013 to 7.02 nights per trip in 2014. This again highlights the points made on the previous page regarding the 2013 overseas figures although as we are dealing with a relatively small proportion of visitors compared to the domestic market larger swings in the data are always likely and don't necessarily indicate an underlying issue. In 2015 overseas nights increased by 12% compared to 2014 and returned to a broadly similar level as was seen in the county between 2009 to 2012. The volume of overseas nights in 2016 remained at a similar level to 2015.

Overall the data suggests that the volume of visitor nights in 2016 had decreased by 17% compared to the base year of 2006.

## Comparisons with previous years – Devon Overseas Staying Spend

Year	Spend	Year on year % change	% Change from base year
2006	£160,530,000		
2007	£137,000,000	-15%	
2008	£186,956,000	36%	16%
2009	£181,855,000	-3%	13%
2010	£167,971,000	-8%	5%
2011	£183,496,000	9%	14%
2012	£201,104,000	10%	25%
2013	£258,760,000	29%	61%
2014	£192,454,000	-26%	20%
2015	£195,216,000	1%	22%
2016	£205,197,000	5%	28%

### Devon overseas staying spend

Generally speaking, overseas spend performance has been mixed across the analysis period although unlike overseas trips and nights witnessed year on year growth between 2011 and 2013. In a similar trend to overseas trips and nights, in 2013 a significant increase in overseas staying spend of 29% was estimated. Overseas staying expenditure in 2013 was at the highest level of the eight year analysis period and perhaps unsurprisingly decreased by 26% in 2014 to approximately £192.5 million in line with decreases in overseas trips and nights. However, overseas spend remained at a reasonable level in 2014 despite the decrease and was 5% above 2011 levels and 4% below 2012 levels. Overseas spend in 2015 remained at a broadly similar level to the previous year with a 1% increase recorded with 2016 witnessing a further increase in spend (+5%). With overseas nights remaining at a similar level this indicates an increase in spend per person per night which rose from £55.84 in 2015 to £58.63 in 2016

The data suggests that overall the value of overseas spend in 2016 had increased by 28% from the base year of 2006 although it should be noted that data from the International Passenger Survey (IPS) is not adjusted to account for inflation.

## Comparisons with previous years – Devon Combined Staying Trips

Year	Trips	Year on year % change	% Change from base year
2006	5,630,000		
2007	6,057,000	8%	
2008	5,255,000	-13%	-7%
2009	5,738,000	9%	2%
2010	5,491,000	-4%	-2%
2011	5,635,000	3%	0%
2012	5,647,000	0%	0%
2013	5,652,000	0%	0%
2014	5,565,000	-2%	-1%
2015	5,754,000	3%	2%
2016	5,689,000	-1%	1%

### Devon combined staying trips

When domestic and overseas staying trips are combined the data shows peaks in volume in 2007 and 2009 with decreases following each of these years. 2011 witnessed an increase of 3% compared to 2010 with 2012 and 2013 remaining at a similar level to 2011. There was a slight decrease in the volume of staying visitor trips in 2014 (-2%) driven by the estimated decrease in overseas visitors during the year although 2015 witnessed a 3% increase with trip volumes slightly higher than those that were witnessed between 2011 and 2013. Overall trips in 2016 remained at a broadly similar level with a slight decrease of 1% witnessed.

Over both recent years and compared to the base year of 2006 the volumes of combined staying trips to the county continues to show relative stability and no real growth and overall the volume of all staying trips in 2016 was 1% higher than the base year of 2006.

## Comparisons with previous years – Devon Combined Staying Nights

Year	Nights	Year on year % change	% Change from base year
2006	24,286,000		
2007	26,146,000	8%	
2008	22,878,000	-12%	-6%
2009	24,722,000	8%	2%
2010	24,813,000	0%	2%
2011	24,571,000	-1%	1%
2012	23,801,000	-3%	-2%
2013	23,981,000	1%	-1%
2014	22,807,000	-5%	-6%
2015	24,525,000	8%	1%
2016	23,611,000	-4%	-3%

### Devon combined staying nights

The trend for the combined staying visitor nights follows a similar pattern to the combined trips in terms of the peak years. However, since 2010 there have been decreased visitor nights in each year with the exception of 2013, which saw a small increase (+1%), indicating a decreasing length of stay in the county. 2014 saw the largest decrease compared to the previous year in recent times (post 2010) of -5%, however, there was an 8% increase in 2015 and visitor night volumes were similar to those witnessed between 2009 to 2011. In 2016 visitor night volumes decreased by 4% and returned to similar levels as witnessed in 2012 and 2013. Visitor nights volumes between 23.5m and 24.5m would appear to be the expected range in recent years.

Overall the data suggests that the volume of visitor nights in 2016 was 3% lower than the base year of 2006.



## Comparisons with previous years – Devon Combined Staying Spend

Year	Spend	Year on year % change	% Change from base year
2006	£1,069,530,000		
2007	£1,298,976,000	21%	
2008	£1,118,196,000	-14%	5%
2009	£1,217,855,000	9%	14%
2010	£1,166,192,000	-4%	9%
2011	£1,184,495,000	2%	11%
2012	£1,358,104,000	15%	27%
2013	£1,381,052,000	2%	29%
2014	£1,289,906,000	-7%	21%
2015	£1,370,934,000	6%	28%
2016	£1,358,516,000	-1%	27%

### Devon combined staying spend

Combined staying visitor spend performance has been mixed across the analysis period with the peak years being 2012, 2009 and 2007 which displayed the largest levels of expenditure and the largest increases to the years preceding them. Staying visitor spend also saw a small increase in 2011 (+2%) compared to 2010 but decreases compared to the previous years in 2008 (-14%) and 2010 (-4%). In 2013 combined staying visitor spend increased by an estimated 2% compared to 2012 again showing that staying visitor tourism levels were broadly similar to 2012 for all measures in 2013. 2014 witnessed a 7% decrease in staying visitor spend, in a similar manner to the decreases in trips and nights and compared to 2013, but 2015 witnessed a 6% increase. This saw visitor spend return to similar levels as witnessed in 2012 and 2013. In 2016 all staying visitor spend remained at a broadly similar level to 2015.

The data suggests that overall the value of staying visitor spend in 2016 had increased by 27% from the base year of 2006 although again it should be noted that data from the national tourism surveys is not adjusted to account for inflation.

## Comparisons with previous years – Devon Day Visits and Spend

Year	Day visits	Year on year % change	% Change from base year
2011	28,998,000		
2012	30,806,000	6%	
2013	31,012,000	1%	7%
2014	29,772,000	-4%	3%
2015	28,575,000	-4%	-1%
2016	29,882,000	5%	3%

Year	Day visit spend	Year on year % change	% Change from base year
2011	£978,585,000		
2012	£1,037,037,000	6%	
2013	£1,041,166,000	0%	6%
2014	£1,015,924,000	-2%	4%
2015	£1,013,711,000	0%	4%
2016	£1,041,240,000	3%	6%

### Devon day visits and spend

The day visits data currently available for comparison suggests an increase of 6% for both day visits and spend in 2012 compared to 2011, with similar levels of both visits and spend in 2013 compared to 2012 (1% increase in visits and no change in spend). 2014 witnessed decreases for both trips (-4%) and spend (-2%) compared to 2013 and 2015 saw a further decrease for the volume of trips (-4%) although spend remained at a similar level to 2014. In 2016 the volume of day visits saw an increase of 5% compared to 2015 and returned to similar levels as were witnessed in 2014. Day visit spend also increased for the first time since 2012 (+3%) and returned to similar levels as were witnessed in 2012 and 2013.

In 2016 the volume of day visits had increased by 3% since the base year of 2011 and the value of day visitor spend had increased by 6%, although again it should be noted that spend data from the national tourism surveys is not adjusted to account for inflation.

## Volume and value - Comparisons with other areas

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This section looks at Devon's performance in comparison to other key competitor areas as nominated by the DTP. Due to the fact that not all areas conduct Cambridge Model projects it has been necessary to compile this data from the UKTS/GBTS and IPS surveys to ensure comparability across all areas. Please note that some figures may not exactly match those produced by the Cambridge Model due to the presence of rounding in both the national survey outputs and the modelled outputs and also as some local level adjustments may have been made in the modelling process to reflect local data.

All data within this section has been sourced from UKTS/GBTS and IPS with the exception of Bath and Bournemouth overseas data which is taken from Value of Tourism projects. To ensure that all data is comparable three year averages have been used as released by VisitEngland for UKTS/GBTS and recommended for use by VisitBritain for IPS. The use of averages provides a more robust estimate than individual yearly data but through the nature of the calculation changes in activity will be softened and the data will refer to a three year rather than a single year period.

## Comparisons with other areas – Domestic Staying Trips

Area	Trips 06 – 08 (000's)	Trips 07 – 09 (000's)	Trips 08 – 10 (000's)	Trips 09 – 11 (000's)	Trips 10 – 12 (000's)	Trips 11 – 13 (000's)	Trips 12 – 14 (000's)	Trips 13 – 15 (000's)	Trips 14 – 16 (000's)	Overall % change from 06 - 08
<b>Devon</b>	<b>5,157</b>	<b>5,203</b>	<b>5,017</b>	<b>5,166</b>	<b>5,082</b>	<b>4,961</b>	<b>4,749</b>	<b>4,717</b>	<b>4,810</b>	<b>-7%</b>
% change		1%	-4%	3%	-2%	-2%	-4%	-1%	2%	
Bath	686	631	648	683	783	740	740	803	857	25%
% change		-8%	3%	5%	15%	-5%	0%	9%	7%	
Bristol	1,605	1,588	1,567	1,686	1,331	1,510	1,512	1,551	1,501	-6%
% change		-1%	-1%	8%	-21%	13%	0%	3%	-3%	
Bournemouth	1,020	980	934	965	963	953	871	848	847	-17%
% change		-4%	-5%	3%	0%	-1%	-9%	-3%	0%	
Cornwall	4,296	4,443	4,226	4,245	3,983	4,067	3,809	3,887	4,068	-5%
% change		3%	-5%	0%	-6%	2%	-6%	2%	5%	
Cumbria	3,508	3,712	3,717	3,782	3,584	3,512	3,543	3,457	3,423	-2%
% change		6%	0%	2%	-5%	-2%	1%	-2%	-1%	
Kent	3,717	3,485	3,291	3,212	3,122	3,199	3,199	3,037	2,986	-20%
% change		-6%	-6%	-2%	-3%	2%	0%	-5%	-2%	
Yorkshire	9,919	10,108	10,016	10,710	10,942	10,956	10,235	10,259	10,022	1%
% change		2%	-1%	7%	2%	0%	-7%	0%	-2%	

Generally speaking the comparison of three year averages for domestic visitor trips amongst the nominated areas shows mixed performance between periods across all areas. For the 14-16 average period only three areas recorded increases, all of which are located in the South West (Devon +2%, Bath +7% and Cornwall +5%). Trips to Bournemouth remained at a similar level with all other areas witnessing decreases.

Looking at the overall change between the 14-16 average period and the 06-08 average period only Bath (+25%) and Yorkshire (+1%) have seen increased trips volumes over the entire analysis period. Devon saw a decrease of 7% over the analysis period which was better than two other comparative areas (Bournemouth (-17%) and Kent (-20%)).

## Comparisons with other areas – Domestic Staying Nights

Area	Nights 06 – 08 (000's)	Nights 07 – 09 (000's)	Nights 08 – 10 (000's)	Nights 09 – 11 (000's)	Nights 10 – 12 (000's)	Nights 11 – 13 (000's)	Nights 12 – 14 (000's)	Nights 13 – 15 (000's)	Nights 14 – 16 (000's)	Overall % change from 06 - 08
<b>Devon</b>	<b>20,485</b>	<b>20,781</b>	<b>20,220</b>	<b>21,061</b>	<b>20,387</b>	<b>20,075</b>	<b>18,746</b>	<b>18,740</b>	<b>18,389</b>	<b>-10%</b>
% change		1%	-3%	4%	-3%	-2%	-7%	0%	-2%	
Bath	1,647	1,594	1,489	1,567	1,814	1,727	1,784	1,961	1,987	21%
% change		-3%	-7%	5%	16%	-5%	3%	10%	1%	
Bristol	3,650	3,613	3,650	3,980	3,014	3,268	3,177	3,160	3,259	-11%
% change		-1%	1%	9%	-24%	8%	-3%	-1%	3%	
Bournemouth	3,068	2,964	2,849	2,858	2,844	2,795	2,603	2,548	2,456	-20%
% change		-3%	-4%	0%	0%	-2%	-7%	-2%	-4%	
Cornwall	22,065	22,691	21,746	21,702	19,853	20,304	19,201	19,332	19,729	-11%
% change		3%	-4%	0%	-9%	2%	-5%	1%	2%	
Cumbria	11,968	12,845	12,559	13,136	12,340	12,034	12,081	11,788	11,800	-1%
% change		7%	-2%	5%	-6%	-2%	0%	-2%	0%	
Kent	9,673	9,246	8,779	8,176	8,110	8,293	8,429	7,474	7,300	-25%
% change		-4%	-5%	-7%	-1%	2%	2%	-11%	-2%	
Yorkshire	28,126	28,501	27,253	28,504	28,850	29,456	28,202	28,831	28,138	0%
% change		1%	-4%	5%	1%	2%	-4%	2%	-2%	

Generally speaking the comparison of three year averages for domestic visitor nights amongst the nominated areas again shows mixed performance between periods across all areas. For the 14-16 average period only three South West areas recorded increases Bristol (+3%), Bath (+1%) and Cornwall (+2%) recorded increases with Devon nights 2% lower than the 13-15 period. The largest decrease in visitor nights was evident in Bournemouth (-4%) and generally speaking there were no large changes in performance across the comparison areas.

Looking at the overall change between the 14-16 average period and the 06-08 average period only Bath (+21%) has seen increased nights volumes over the entire analysis period. Whilst Devon's volume of domestic nights has witnessed a 10% decrease its performance was better than four other comparative areas; Kent (-25%), Bournemouth (-20%) and Cornwall and Bristol (-11% each).

## Comparisons with other areas – Domestic Staying Spend

Area	Spend 06 – 08 (£ millions)	Spend 07 – 09 (£ millions)	Spend 08 – 10 (£ millions)	Spend 09 – 11 (£ millions)	Spend 10 – 12 (£ millions)	Spend 11 – 13 (£ millions)	Spend 12 – 14 (£ millions)	Spend 13 – 15 (£ millions)	Spend 14 – 16 (£ millions)	Overall % change from 06 - 08
<b>Devon</b>	<b>994</b>	<b>1,034</b>	<b>981</b>	<b>1,006</b>	<b>1,028</b>	<b>1,042</b>	<b>1,036</b>	<b>1,033</b>	<b>1,101</b>	<b>11%</b>
% change		4%	-5%	3%	2%	1%	-1%	0%	7%	
Bath	125	116	122	126	148	148	161	179	193	54%
% change		-7%	5%	3%	17%	0%	9%	11%	8%	
Bristol	236	240	232	250	204	252	253	255	261	11%
% change		2%	-3%	8%	-18%	24%	0%	1%	2%	
Bournemouth	191	173	166	173	179	180	184	189	183	-4%
% change		-9%	-4%	4%	3%	1%	2%	3%	-3%	
Cornwall	1,060	1,095	1,076	1,122	1,091	1,159	1,107	1,148	1,193	13%
% change		3%	-2%	4%	-3%	6%	-4%	4%	4%	
Cumbria	669	716	749	788	767	751	761	737	788	18%
% change		7%	5%	5%	-3%	-2%	1%	-3%	7%	
Kent	352	376	378	393	403	428	458	402	404	15%
% change		7%	1%	4%	3%	6%	7%	-12%	0%	
Yorkshire	1,385	1,432	1,449	1,542	1,639	1,754	1,776	1,814	1,756	27%
% change		3%	1%	6%	6%	7%	1%	2%	-3%	

Generally speaking the comparison of three year averages for domestic visitor spend amongst the nominated areas shows mixed performance between periods across all areas. However, some trends emerging include;

- Yorkshire saw increased spend across all average periods except for the 14-16 period.
- Kent saw increased spend in all but the last two periods.
- Devon witnessed increased spend in five out of the seven average periods and a 7% increase in the 14-16 period
- In the 14-16 average period Yorkshire and Bournemouth were the only areas to see decreased domestic spend with the highest increase being in Bath (+8%).

Looking at the overall change between the 14-16 average period and the 06-08 average period only Bournemouth (-4%) saw decreased spend volumes. Overall percentage change in Devon (+11%) was the equal lowest increase recorded and level with Bristol. Bath (+54%) and Yorkshire (+27%) having the highest increases.

## Comparisons with other areas – Overseas Staying Trips

Area	Trips 06 – 08 (000's)	Trips 07 – 09 (000's)	Trips 08 – 10 (000's)	Trips 09 – 11 (000's)	Trips 10 – 12 (000's)	Trips 11 – 13 (000's)	Trips 12 – 14 (000's)	Trips 13 – 15 (000's)	Trips 14 – 16 (000's)	Overall % change from 06 - 08
<b>Devon</b>	<b>466</b>	<b>461</b>	<b>465</b>	<b>444</b>	<b>418</b>	<b>450</b>	<b>456</b>	<b>482</b>	<b>448</b>	<b>-4%</b>
% change		-1%	1%	-4%	-6%	8%	1%	6%	-7%	
Bath	252	251	249	242	235	242	249	288	305	21%
% change		0%	-1%	-3%	-3%	3%	3%	16%	6%	
Bristol	455	461	430	410	401	418	423	467	514	13%
% change		1%	-7%	-5%	-2%	4%	1%	10%	10%	
Bournemouth	137	139	134	128	123	141	149	158	166	21%
% change		1%	-4%	-4%	-4%	14%	6%	6%	5%	
Cornwall	298	299	295	301	308	309	318	324	334	12%
% change		1%	-1%	2%	2%	0%	3%	2%	3%	
Cumbria	223	206	195	202	215	229	240	244	261	17%
% change		-7%	-5%	4%	6%	6%	5%	2%	7%	
Kent	859	885	899	899	911	951	981	1,038	1,069	24%
% change		3%	2%	0%	1%	4%	3%	6%	3%	
Yorkshire	1,229	1,176	1,127	1,083	1,089	1,148	1,227	1,293	1,340	9%
% change		-4%	-4%	-4%	1%	5%	7%	5%	4%	

The comparison of three year averages for overseas visitor trips amongst the nominated areas shows mixed performance between periods across all areas. Looking at the 14-16 average period all areas again witnessed increased overseas trips compared to the previous period with the exception of Devon (-7%). However, the Devon decrease is likely to be as a result of the 2013 record year figure dropping out of the three year average period and may not indicate actual change as a result. The highest increase was witnessed in Bristol (+10%).

Cumbria has seen increased overseas trips for each period since 09-11 and Yorkshire and Kent have seen increased trips for each period since the 10-12 period.

Looking at the overall change between the 14-16 average period and the 06-08 average period all areas have witnessed increased trip volumes again with the exception of Devon (-4%).

## Comparisons with other areas – Overseas Staying Nights

Area	Nights 06 – 08 (000's)	Nights 07 – 09 (000's)	Nights 08 – 10 (000's)	Nights 09 – 11 (000's)	Nights 10 – 12 (000's)	Nights 11 – 13 (000's)	Nights 12 – 14 (000's)	Nights 13 – 15 (000's)	Nights 14 – 16 (000's)	Overall % change from 06 - 08
<b>Devon</b>	<b>3,916</b>	<b>3,732</b>	<b>3,839</b>	<b>3,569</b>	<b>3,505</b>	<b>3,888</b>	<b>3,687</b>	<b>3,669</b>	<b>3,259</b>	<b>-17%</b>
% change		<b>-5%</b>	<b>3%</b>	<b>-7%</b>	<b>-2%</b>	<b>11%</b>	<b>-5%</b>	<b>0%</b>	<b>-11%</b>	
Bath	1,618	1,526	1,307	1,163	1,171	1,233	1,248	1,418	1,525	-6%
% change		-6%	-14%	-11%	1%	5%	1%	14%	8%	
Bristol	3,271	3,231	2,955	2,584	2,567	2,596	2,717	3,089	3,553	9%
% change		-1%	-9%	-13%	-1%	1%	5%	14%	15%	
Bournemouth	1,415	1,358	1,168	1,070	1,091	1,233	1,285	1,345	1,457	3%
% change		-4%	-14%	-8%	2%	13%	4%	5%	8%	
Cornwall	2,209	2,261	2,177	2,207	2,121	2,206	2,228	2,296	2,326	5%
% change		2%	-4%	1%	-4%	4%	1%	3%	1%	
Cumbria	1,391	1,433	1,336	1,354	1,164	1,273	1,218	1,229	1,275	-8%
% change		3%	-7%	1%	-14%	9%	-4%	1%	4%	
Kent	5,815	5,442	5,345	5,461	5,437	5,595	5,666	6,081	6,120	5%
% change		-6%	-2%	2%	0%	3%	1%	7%	1%	
Yorkshire	11,207	10,060	10,043	9,327	9,376	10,101	10,321	10,652	11,014	-2%
% change		-10%	0%	-7%	1%	8%	2%	3%	3%	

The comparison of three year averages for overseas visitor nights amongst the nominated areas again shows mixed performance between periods across all areas. Looking at the 14-16 period all areas saw increased overseas visitor nights compared to the previous period with the exception of Devon which saw a decrease of 11%, although the loss of the 2013 data from the calculation as noted on the previous slide should be considered here.

Looking over time there are no clear long term trends indicating a variable length of stay for overseas visitors, although Bath, Bournemouth and Yorkshire continue to have seen increases for each period since the 10-12 period.

Looking at the overall change between the 14-16 average period and the 06-08 average period, Devon's volume of overseas nights decreased by 17% and is the largest decrease of all comparative areas. Bristol recorded the largest increase from the base period (+9%).



## Comparisons with other areas – Overseas Staying Spend

Area	Spend 06 – 08 (£ millions)	Spend 07 – 09 (£ millions)	Spend 08 – 10 (£ millions)	Spend 09 – 11 (£ millions)	Spend 10 – 12 (£ millions)	Spend 11 – 13 (£ millions)	Spend 12 – 14 (£ millions)	Spend 13 – 15 (£ millions)	Spend 13 – 15 (£ millions)	Overall % change from 06 - 08
<b>Devon</b>	<b>162</b>	<b>169</b>	<b>179</b>	<b>178</b>	<b>184</b>	<b>214</b>	<b>217</b>	<b>205</b>	<b>185</b>	<b>14%</b>
% change		4%	6%	-1%	4%	16%	1%	-6%	-10%	
Bath	76	78	77	75	70	76	81	92	94	23%
% change		2%	-1%	-2%	-8%	10%	7%	13%	1%	
Bristol	138	163	164	155	127	140	150	171	186	35%
% change		19%	0%	-5%	-18%	10%	7%	14%	9%	
Bournemouth	67	77	72	73	73	83	83	88	98	46%
% change		15%	-6%	1%	0%	14%	0%	7%	11%	
Cornwall	107	117	119	120	126	129	131	130	136	27%
% change		9%	2%	1%	5%	2%	2%	-1%	5%	
Cumbria	66	67	62	67	73	81	80	78	81	22%
% change		1%	-6%	8%	8%	11%	-1%	-2%	4%	
Kent	231	254	266	289	278	297	304	314	318	38%
% change		10%	5%	9%	-4%	7%	2%	3%	1%	
Yorkshire	419	418	443	454	444	500	529	557	534	27%
% change		0%	6%	2%	-2%	13%	6%	5%	-4%	

The comparison of three year averages for overseas visitor spend amongst the nominated areas shows mixed performance between years across all areas although instances of decreased spend are few. Some trends emerging include;

- Cornwall saw increased spend across all average periods except the 13-15 period.
- Kent also witnessed increased spend in seven out of the eight average periods.
- In the 14-16 average period all areas recorded increased spend with the exception of Yorkshire (-4%) and Devon (-10%).
- Devon has witnessed decreased expenditure for the last two average periods.

Looking at the overall change between the 14-16 average period and the 06-08 average period all areas saw increased spend value. Overall percentage change in Devon (+14%) was the lowest of all comparison areas.

# Looking Ahead - Introduction

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This section provides an estimate of what is likely to happen to visitor volume and value in Devon over the period of 2017 to 2021. An overview of the process used to reach the forecast estimates is provided below.

## **Devon forecasting**

The forecast figures are based solely upon Devon's historical performance and do not attempt to build in data on consumer spending, exchange rates etc. The assumptions made in producing the forecasts also assume the same level of expenditure on Devon tourism marketing as was made up to 2014, so do not reflect any additional investment made since then. We envisage that mid-range forecast estimates should be used with upper and lower estimates used to account for any changes in things such as consumer spending, exchange rates and the weather which may produce an unexpected swing in visitor volume and expenditure in any given year.

National forecast data estimates 1.5% pa real growth in expenditure (3.5% including inflation), with current Devon forecasts estimating real growth in expenditure of approximately 1% pa assuming a similar inflation level of 2% for the period of 2017-2021. This is perhaps a more realistic estimate of growth considering the historical data for Devon.

The forecast data for Devon has been calculated using three year average data for each measure (trips, nights and spend) removing any unusually high or low figures from the data which may have occurred largely by chance or which may be as a result of sample sizes at a county level and increased margins of error.

The average data has then be used to establish upper, mid and lower estimates from which forecast ratios have been calculated which have been used to establish 2017 estimates. Future years have then been calculated using the ratio between 2017 and the latest years' data assumed to be reliable at the mid-range, with upper and lower estimates based upon the mid-range estimate and the differentials established between the ranges based upon the historical data.

The forecasts assume similar yearly growth across the forecast period at the mid-range and allow the opportunity to update and revise as further years data becomes available.

## Looking Ahead – Mid-Range Forecasts – All Visitor Expenditure

MID-RANGE FORECASTS	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
<b>TOTAL SPEND (£mn)</b>	£2,163.08	£2,395.14	£2,422.22	£2,305.83	£2,384.65	£2,399.76	£2,385.99	£2,436.92	£2,489.07	£2,542.49	£2,597.21
<b>% CHANGE</b>		10.7%	1.1%	-4.8%	3.4%	0.6%	-0.6%	2.1%	2.1%	2.1%	2.2%
<b>TOTAL VISITOR RELATED SPEND (£mn)</b>	£2,250.38	£2,497.73	£2,501.12	£2,380.66	£2,471.95	£2,453.83	£2,458.84	£2,511.32	£2,565.07	£2,620.12	£2,676.51
<b>% CHANGE</b>		11.0%	0.1%	-4.8%	3.8%	-0.7%	0.2%	2.1%	2.1%	2.1%	2.2%
<b>TOTAL BUSINESS TURNOVER (£mn)</b>	£3,100.39	£3,609.09	£3,606.17	£3,402.37	£3,513.15	£3,482.34	£3,499.35	£3,574.04	£3,650.54	£3,728.89	£3,809.14
<b>% CHANGE</b>		16.4%	-0.1%	-5.7%	3.3%	-0.9%	0.5%	2.1%	2.1%	2.1%	2.2%
<b>TOTAL ACTUAL RELATED EMPLOYMENT</b>	63,133	73,381	72,465	65,249	64,693	63,204	62,405	63,293	64,199	65,121	66,060
<b>% CHANGE</b>		16.2%	-1.2%	-10.0%	-0.9%	-2.3%	-1.3%	1.4%	1.4%	1.4%	1.4%

As anticipated in the previous version of this report all visitor spend remained at similar levels in 2016 compared to 2015. Based upon the available data at the time of compiling this report it is anticipated that tourism spend in 2017 will again remain relatively stable with all visitor expenditure forecast to decrease slightly by 0.6% to £2,386 million with subsequent growth of 2.1% for each year thereafter to £2,597 million in 2021. This represents a growth of 11% in visitor spend over the forecast period (2016 to 2021).

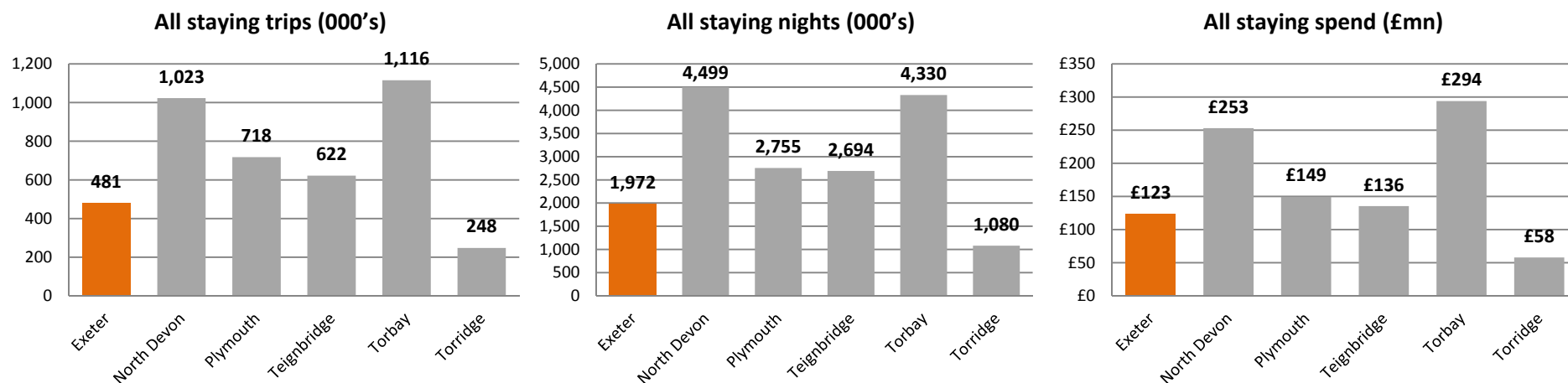
The forecasts assume similar levels of growth for all visitor related spend and the total business turnover over the period, resulting in all visitor related spend increasing to £2,676 million and business turnover increasing to £3,809 million by 2021. Actual employment supported as a result of visitor expenditure is forecast to increase from approximately 63,200 in 2016 to 66,000 in 2021 – an increase of approximately 2,900 actual jobs.

# Value of Tourism 2016

## Exeter

Key Facts	
481,000	Staying visitor trips
1,972,000	Staying visitor nights
£122,979,000	Staying visitor spend
1,823,000	Day visits
£74,022,000	Day visitor spend
£197,001,000	Direct visitor spend
£4,358,000	Other related spend
£201,359,000	TOTAL VISITOR RELATED SPEND
4,286	Estimated actual employment
3,173	FTE employment
7%	Proportion of all employment

## Exeter - 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	422	59	1,375	597	£84	£39
North Devon	965	58	4,139	360	£231	£22
Plymouth	640	78	2,120	635	£114	£36
Teignbridge	584	38	2,432	262	£122	£13
Torbay	1,021	95	3,750	580	£255	£39
Torridge	229	19	939	141	£51	£7

## Exeter - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	172,000	488,000	£47,091,000
Self catering	22,000	122,000	£9,611,000
Touring caravans /tents	0	0	£0
Static vans/holiday centres	0	0	£0
Group/campus	47,000	120,000	£5,922,000
Paying guest in private homes	0	0	£0
Second homes	2,000	9,000	£318,000
Boat moorings	0	1,000	£35,000
Other	5,000	15,000	£757,000
Staying with friends and relatives	174,000	621,000	£20,539,000
Total	422,000	1,375,000	£84,274,000

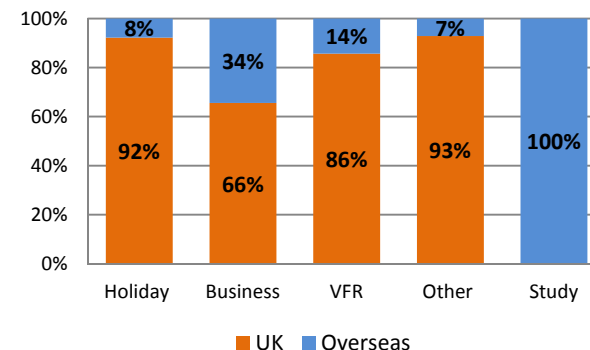
Overseas tourists	Trips	Nights	Spend
Serviced	21,000	79,000	£7,881,000
Self catering	1,000	12,000	£749,000
Touring caravans /tents	0	0	£0
Static vans/holiday centres	0	0	£0
Group/campus	13,000	258,000	£19,959,000
Paying guest in private homes	4,000	79,000	£3,987,000
Second homes	0	1,000	£47,000
Boat moorings	0	0	£0
Other	2,000	11,000	£271,000
Staying with friends and relatives	18,000	158,000	£5,811,000
Total	59,000	597,000	£38,705,000

## Exeter - Staying visits by purpose

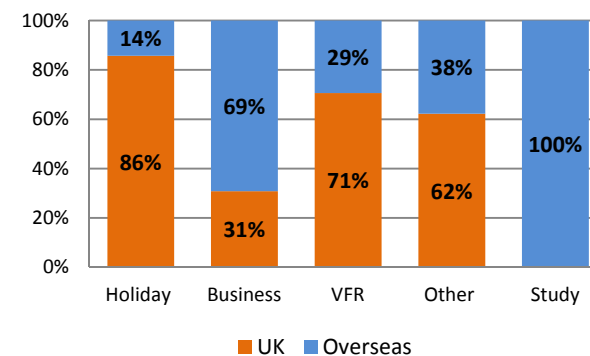
Domestic tourists	Trips	Nights	Spend
Holiday	333,000	1,166,000	£71,277,000
Business	40,000	91,000	£6,471,000
Visits to friends and relatives	36,000	84,000	£4,275,000
Other	13,000	33,000	£2,251,000
Study	0	0	£0
<b>Total</b>	<b>422,000</b>	<b>1,375,000</b>	<b>£84,274,000</b>

Overseas tourists	Trips	Nights	Spend
Holiday	28,000	194,000	£14,582,000
Business	21,000	204,000	£10,042,000
Visits to friends and relatives	6,000	35,000	£2,947,000
Other	1,000	20,000	£648,000
Study	2,000	144,000	£10,486,000
<b>Total</b>	<b>59,000</b>	<b>597,000</b>	<b>£38,705,000</b>

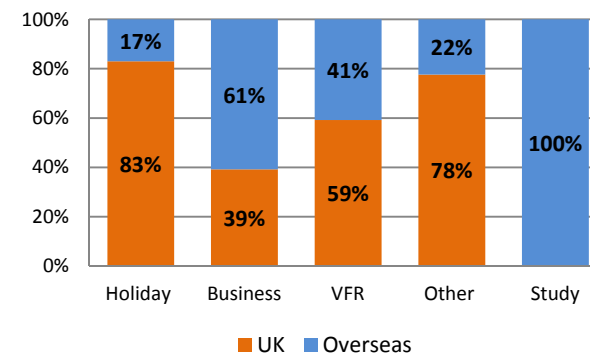
Trips



Nights

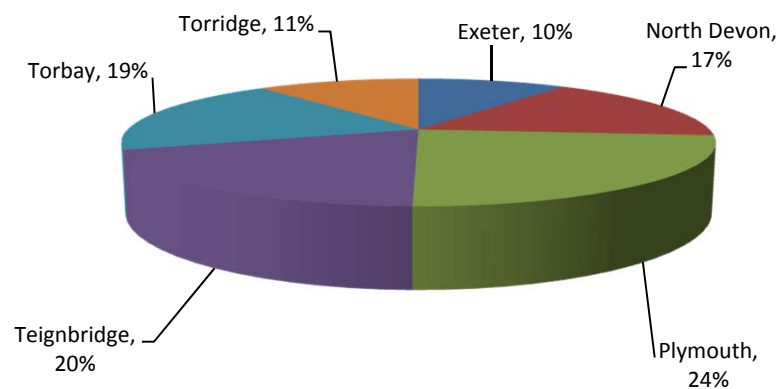


Spend

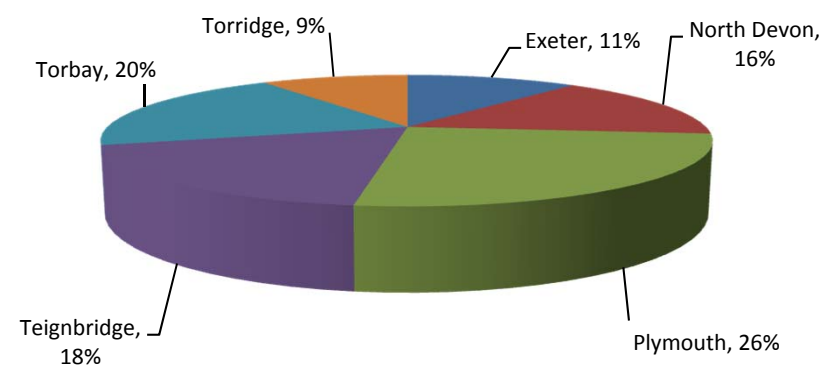


## Exeter - Day visits in the county context

All day visits



All day visit spend

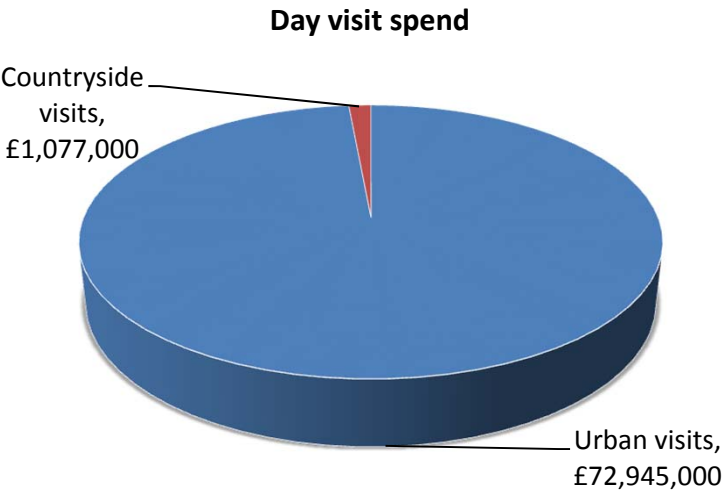
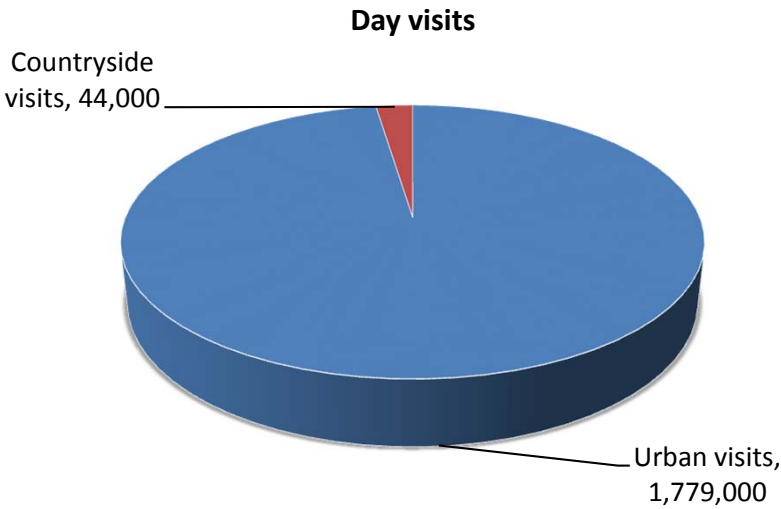


Area	Day visits	Day visit spend
Exeter	1.8	£74.0
North Devon	3.1	£105.0
Plymouth	4.4	£172.3
Teignbridge	3.6	£123.1
Torbay	3.6	£133.8
Torridge	2.0	£63.8



# Exeter - Day visits by location

Total day visits	Total day visit spend
1,823,000	£74,022,000



## Exeter – Direct visitor expenditure by category



### Accommodation

- UK staying visitors £31,519,000
- Overseas staying visitors £12,990,000



### Shopping

- UK staying visitors £10,652,000
- Overseas staying visitors £10,230,000
- Day visitors £32,290,000



### Food & drink

- UK staying visitors £18,735,000
- Overseas staying visitors £7,557,000
- Day visitors £27,573,000



### Attractions/entertainment

- UK staying visitors £9,091,000
- Overseas staying visitors £4,570,000
- Day visitors £7,213,000



### Travel

- UK staying visitors £14,277,000
- Overseas staying visitors £3,359,000
- Day visitors £6,946,000

## Exeter – Other visitor related expenditure by category

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Second Homes

£113,000



Boats

£50,000



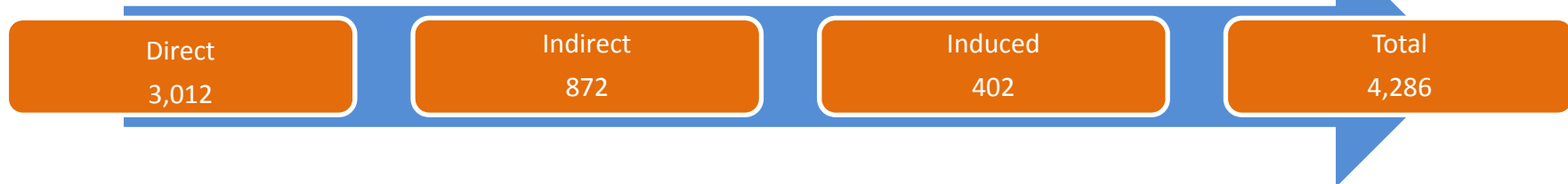
Visiting friends and relatives (non-visitor spend)

£4,195,000

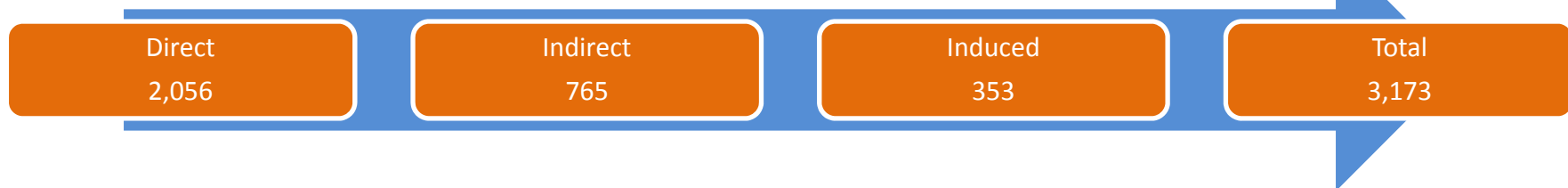
- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay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

## Exeter – Tourism related employment

### Estimated actual employment



### Full time equivalent employment (FTE's)



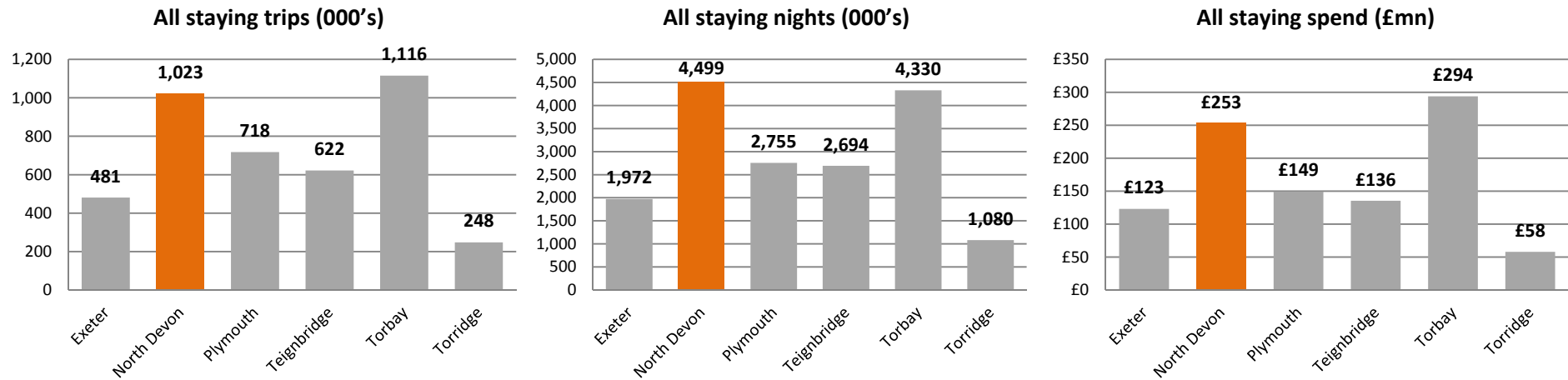
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	568	7	575
Retailing	154	238	392
Catering	304	319	622
Attractions/entertainment	203	112	315
Transport	60	23	83
Arising from non trip spend	69	0	69
Total Direct	1,357	699	2,056

# Value of Tourism 2016

## North Devon

Key Facts	
1,023,000	Staying visitor trips
4,499,000	Staying visitor nights
£252,992,000	Staying visitor spend
3,075,000	Day visits
£105,013,000	Day visitor spend
£358,005,000	Direct visitor spend
£4,167,000	Other related spend
£362,172,000	TOTAL VISITOR RELATED SPEND
8,184	Estimated actual employment
5,852	FTE employment
19%	Proportion of all employment

## North 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)
Exeter	422	59	1,375	597	£84	£39
North Devon	965	58	4,139	360	£231	£22
Plymouth	640	78	2,120	635	£114	£36
Teignbridge	584	38	2,432	262	£122	£13
Torbay	1,021	95	3,750	580	£255	£39
Torridge	229	19	939	141	£51	£7

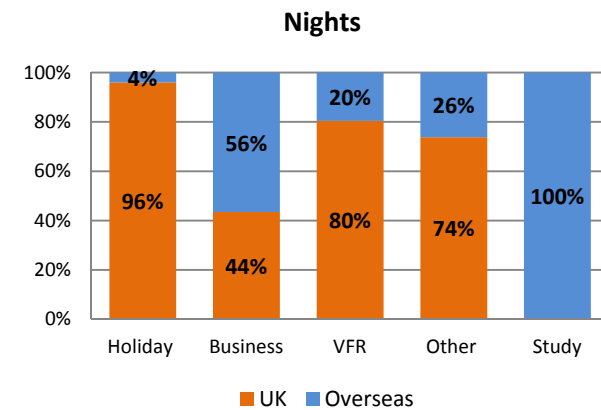
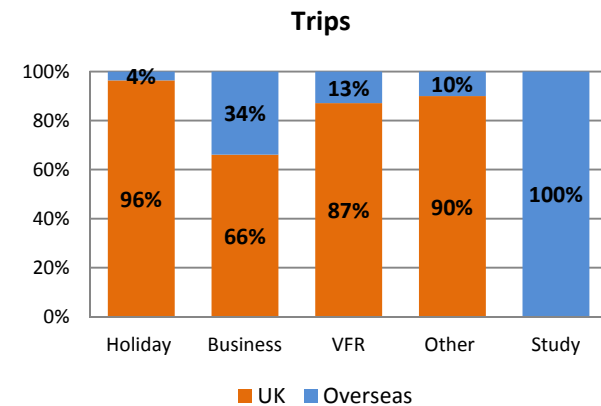
## North Devon - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	211,000	599,000	£57,786,000
Self catering	97,000	545,000	£43,041,000
Touring caravans /tents	229,000	1,106,000	£40,175,000
Static vans/holiday centres	282,000	1,349,000	£71,860,000
Group/campus	0	1,000	£56,000
Paying guest in private homes	0	0	£0
Second homes	12,000	65,000	£2,422,000
Boat moorings	1,000	3,000	£140,000
Other	4,000	11,000	£560,000
Staying with friends and relatives	128,000	459,000	£15,199,000
Total	965,000	4,139,000	£231,238,000

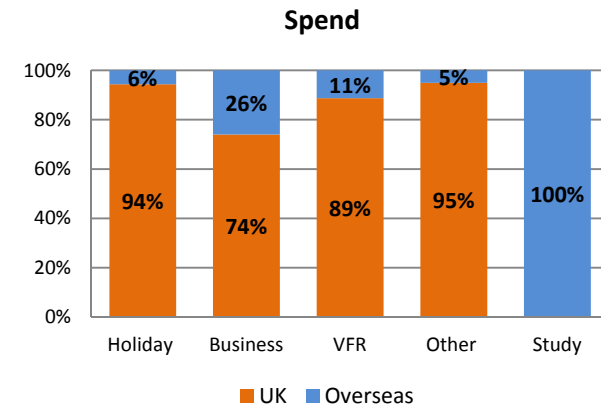
Overseas tourists	Trips	Nights	Spend
Serviced	26,000	97,000	£9,671,000
Self catering	5,000	53,000	£3,356,000
Touring caravans /tents	10,000	46,000	£2,100,000
Static vans/holiday centres	1,000	8,000	£442,000
Group/campus	0	2,000	£189,000
Paying guest in private homes	1,000	23,000	£1,139,000
Second homes	0	7,000	£356,000
Boat moorings	0	0	£0
Other	1,000	8,000	£201,000
Staying with friends and relatives	13,000	117,000	£4,300,000
Total	58,000	360,000	£21,754,000

## North Devon - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	892,000	3,926,000	£195,576,000
Business	37,000	104,000	£17,756,000
Visits to friends and relatives	27,000	78,000	£11,729,000
Other	9,000	31,000	£6,176,000
Study	0	0	£0
<b>Total</b>	<b>965,000</b>	<b>4,139,000</b>	<b>£231,238,000</b>



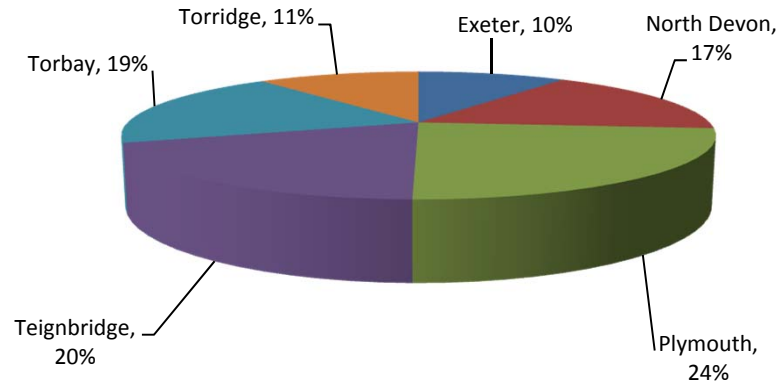
Overseas tourists	Trips	Nights	Spend
Holiday	33,000	165,000	£11,643,000
Business	19,000	135,000	£6,239,000
Visits to friends and relatives	4,000	19,000	£1,492,000
Other	1,000	11,000	£328,000
Study	1,000	30,000	£2,050,000
<b>Total</b>	<b>58,000</b>	<b>360,000</b>	<b>£21,754,000</b>



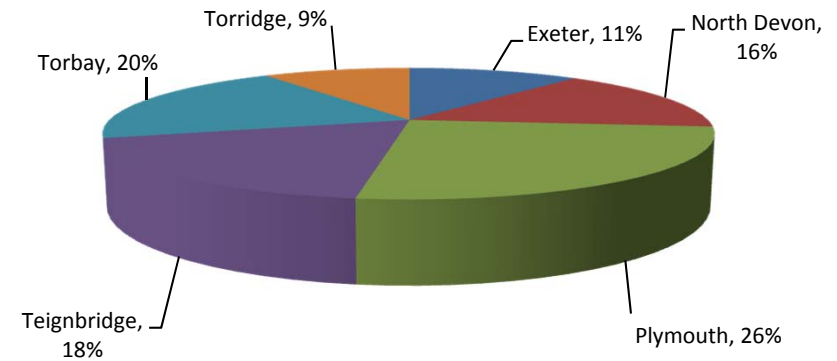


## North Devon - Day visits in the county context

All day visits



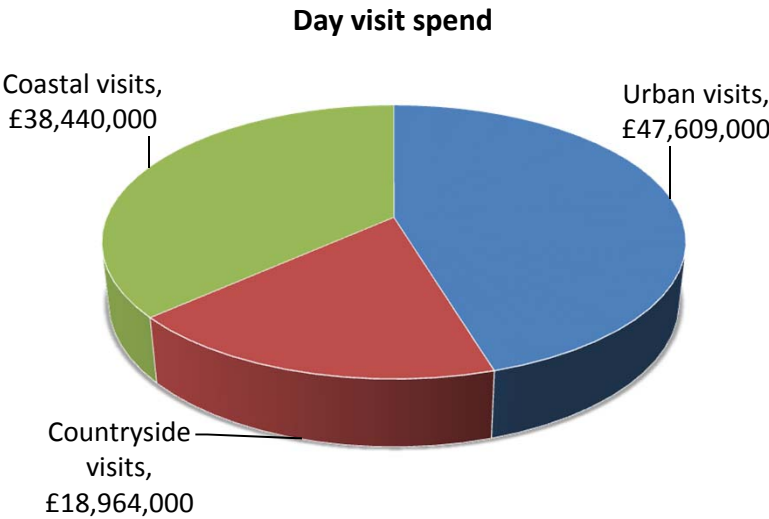
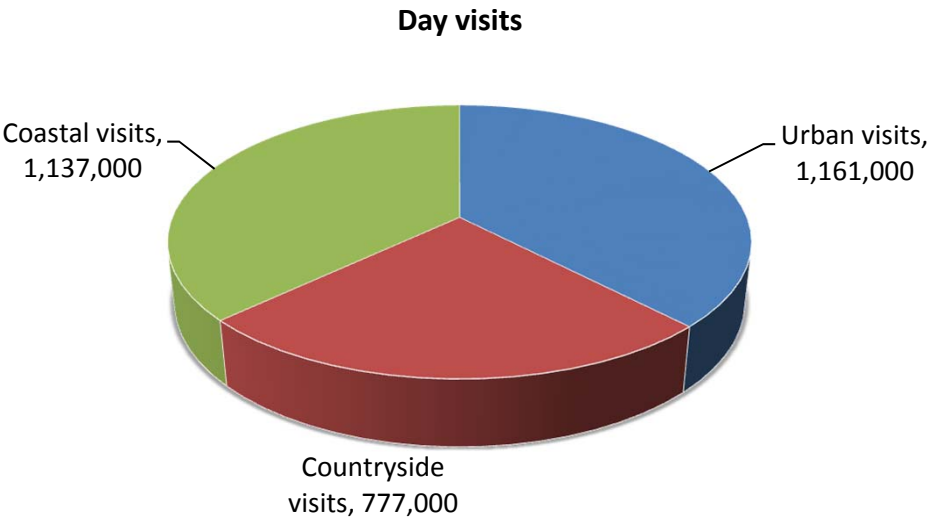
All day visit spend



Area	Day visits	Day visit spend
Exeter	1.8	£74.0
North Devon	3.1	£105.0
Plymouth	4.4	£172.3
Teignbridge	3.6	£123.1
Torbay	3.6	£133.8
Torridge	2.0	£63.8

# North Devon - Day visits by location

Total day visits	Total day visit spend
3,075,000	£105,013,000



## North Devon – Direct visitor expenditure by category



### Accommodation

- UK staying visitors £86,484,000
- Overseas staying visitors £7,689,000



### Shopping

- UK staying visitors £29,228,000
- Overseas staying visitors £5,463,000
- Day visitors £28,410,000



### Food & drink

- UK staying visitors £51,408,000
- Overseas staying visitors £4,571,000
- Day visitors £46,460,000



### Attractions/entertainment

- UK staying visitors £24,945,000
- Overseas staying visitors £1,988,000
- Day visitors £12,075,000



### Travel

- UK staying visitors £39,174,000
- Overseas staying visitors £2,042,000
- Day visitors £18,069,000

## North Devon – Other visitor related expenditure by category

---



Second Homes

£863,000



Boats

£200,000



Visiting friends and relatives (non-visitor spend)

£3,104,000

- 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.

## North Devon – Tourism related employment

### Estimated actual employment



### Full time equivalent employment (FTE's)



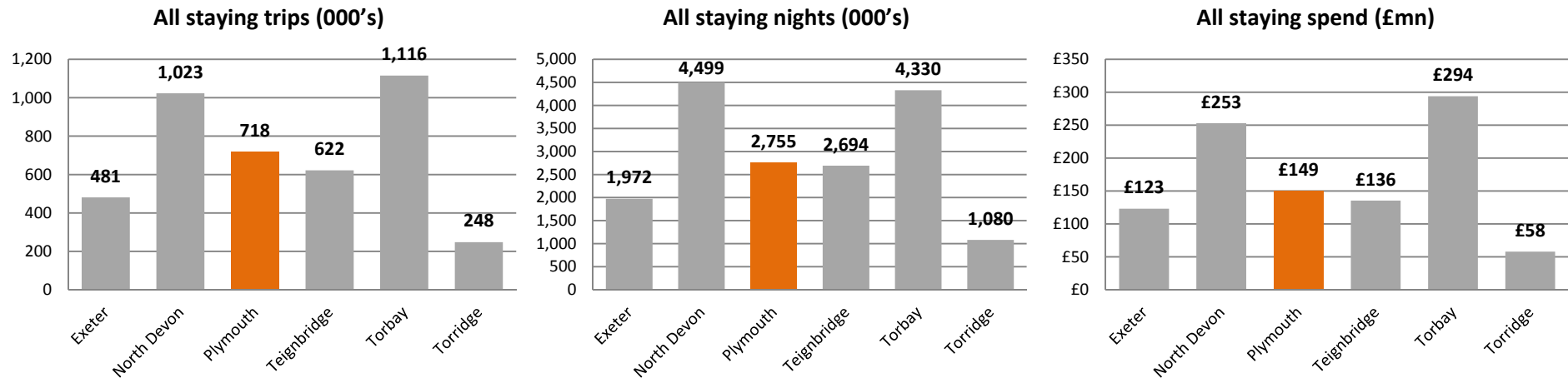
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	1,493	15	1,508
Retailing	317	260	577
Catering	803	667	1,470
Attractions/entertainment	496	228	724
Transport	173	76	249
Arising from non trip spend	66	0	66
<b>Total Direct</b>	<b>3,349</b>	<b>1,245</b>	<b>4,594</b>

# Value of Tourism 2016

## Plymouth

Key Facts	
718,000	Staying visitor trips
2,755,000	Staying visitor nights
£149,452,000	Staying visitor spend
4,398,000	Day visits
£172,315,000	Day visitor spend
£321,767,000	Direct visitor spend
£12,063,000	Other related spend
£333,830,000	TOTAL VISITOR RELATED SPEND
7,649	Estimated actual employment
5,714	FTE employment
6%	Proportion of all employment

## Plymouth - 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	422	59	1,375	597	£84	£39
North Devon	965	58	4,139	360	£231	£22
Plymouth	640	78	2,120	635	£114	£36
Teignbridge	584	38	2,432	262	£122	£13
Torbay	1,021	95	3,750	580	£255	£39
Torridge	229	19	939	141	£51	£7

## Plymouth - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	227,000	642,000	£61,981,000
Self catering	3,000	18,000	£1,382,000
Touring caravans /tents	6,000	29,000	£1,069,000
Static vans/holiday centres	0	0	£0
Group/campus	23,000	57,000	£2,824,000
Paying guest in private homes	0	0	£0
Second homes	2,000	13,000	£467,000
Boat moorings	11,000	49,000	£2,260,000
Other	11,000	31,000	£1,563,000
Staying with friends and relatives	358,000	1,281,000	£42,386,000
Total	640,000	2,120,000	£113,931,000

Overseas tourists	Trips	Nights	Spend
Serviced	28,000	104,000	£10,373,000
Self catering	0	2,000	£108,000
Touring caravans /tents	0	1,000	£56,000
Static vans/holiday centres	0	0	£0
Group/campus	6,000	123,000	£9,517,000
Paying guest in private homes	3,000	56,000	£2,848,000
Second homes	0	1,000	£69,000
Boat moorings	0	0	£0
Other	4,000	22,000	£559,000
Staying with friends and relatives	37,000	326,000	£11,992,000
Total	78,000	635,000	£35,521,000

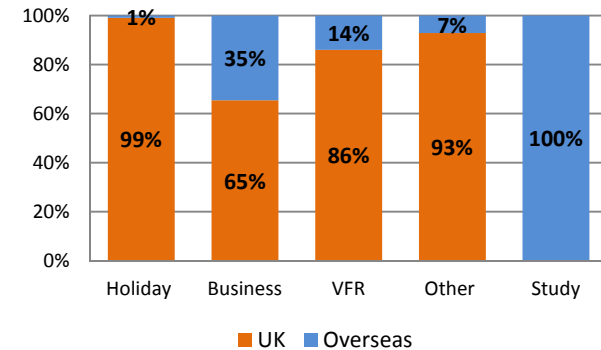


## Plymouth - Staying visits by purpose

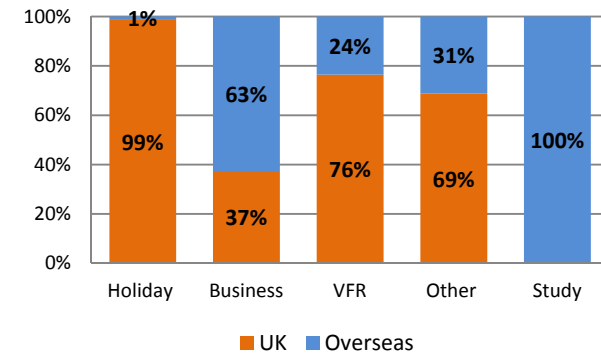
Domestic tourists	Trips	Nights	Spend
Holiday	430,000	1,599,000	£96,361,000
Business	110,000	263,000	£8,749,000
Visits to friends and relatives	74,000	185,000	£5,779,000
Other	26,000	73,000	£3,043,000
Study	0	0	£0
<b>Total</b>	<b>640,000</b>	<b>2,120,000</b>	<b>£113,931,000</b>

Overseas tourists	Trips	Nights	Spend
Holiday	4,000	22,000	£1,649,000
Business	58,000	441,000	£21,900,000
Visits to friends and relatives	12,000	57,000	£4,883,000
Other	2,000	33,000	£1,074,000
Study	2,000	82,000	£6,014,000
<b>Total</b>	<b>78,000</b>	<b>635,000</b>	<b>£35,521,000</b>

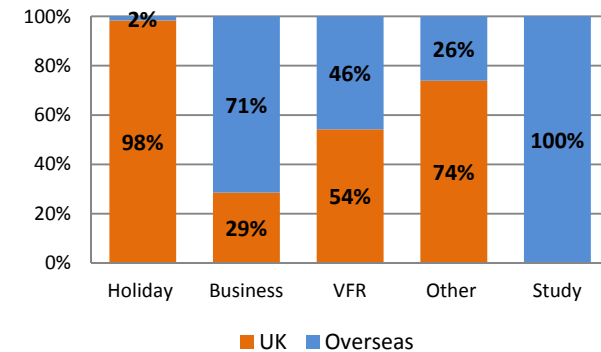
Trips



Nights

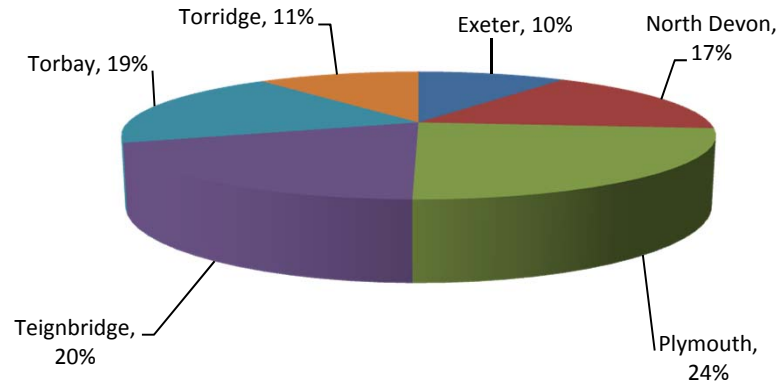


Spend

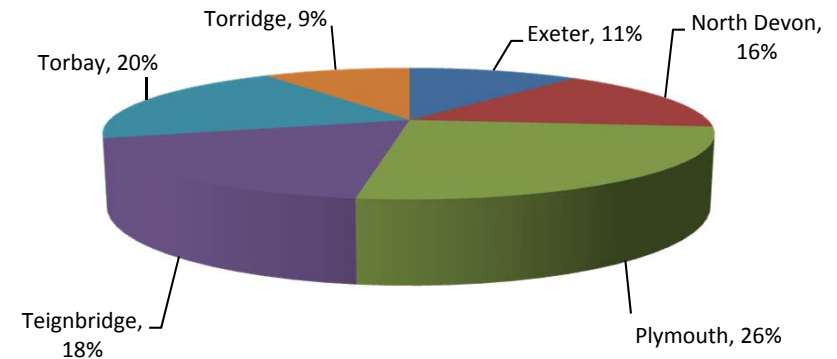


## Plymouth - Day visits in the county context

All day visits



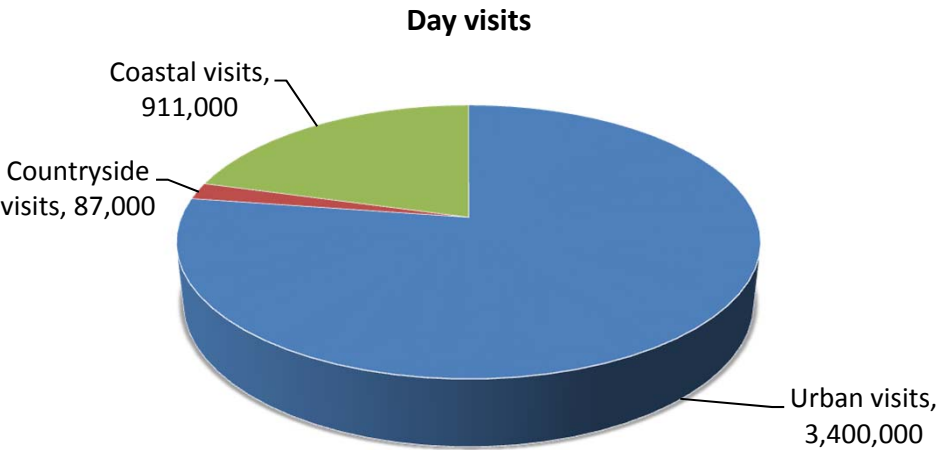
All day visit spend



Area	Day visits	Day visit spend
Exeter	1.8	£74.0
North Devon	3.1	£105.0
Plymouth	4.4	£172.3
Teignbridge	3.6	£123.1
Torbay	3.6	£133.8
Torridge	2.0	£63.8

# Plymouth - Day visits by location

Total day visits	Total day visit spend
4,398,000	£172,315,000



## Plymouth – Direct visitor expenditure by category



### Accommodation

- UK staying visitors £42,611,000
- Overseas staying visitors £13,340,000



### Shopping

- UK staying visitors £14,401,000
- Overseas staying visitors £7,820,000
- Day visitors £64,811,000



### Food & drink

- UK staying visitors £25,329,000
- Overseas staying visitors £6,958,000
- Day visitors £68,724,000



### Attractions/entertainment

- UK staying visitors £12,290,000
- Overseas staying visitors £4,113,000
- Day visitors £17,604,000



### Travel

- UK staying visitors £19,301,000
- Overseas staying visitors £3,290,000
- Day visitors £21,717,000

## Plymouth – Other visitor related expenditure by category

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Second Homes

£167,000



Boats

£3,240,000



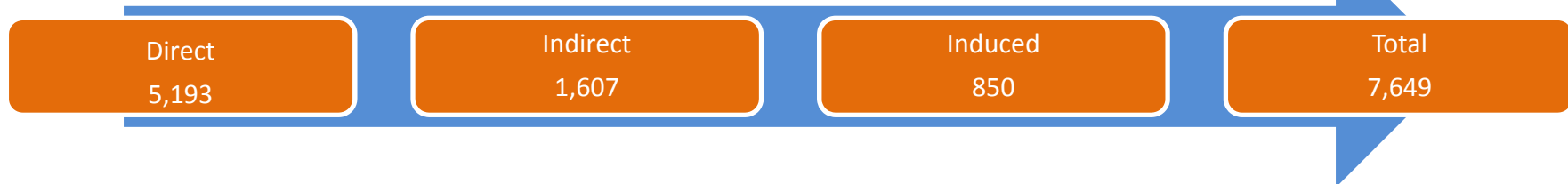
Visiting friends and relatives (non-visitor spend)

£8,656,000

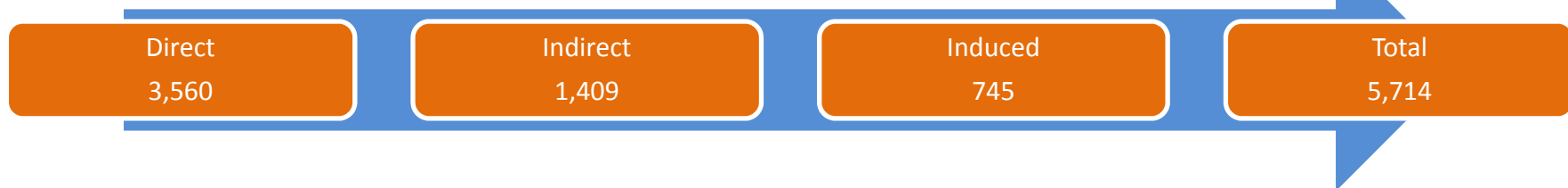
- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay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

## Plymouth – Tourism related employment

### Estimated actual employment



### Full time equivalent employment (FTE's)



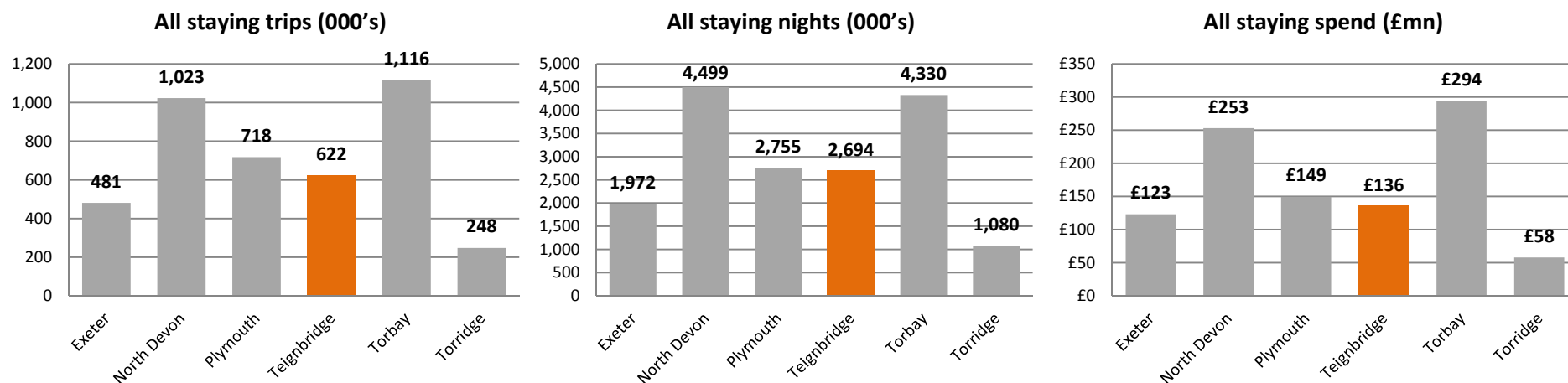
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	753	18	771
Retailing	172	503	676
Catering	393	837	1,230
Attractions/entertainment	256	278	534
Transport	80	77	158
Arising from non trip spend	191	0	191
<b>Total Direct</b>	<b>1,846</b>	<b>1,714</b>	<b>3,560</b>

# Value of Tourism 2016

## Teignbridge

Key Facts	
621,800	Staying visitor trips
2,693,600	Staying visitor nights
£135,506,000	Staying visitor spend
3,640,000	Day visits
£123,101,000	Day visitor spend
£258,607,000	Direct visitor spend
£5,252,000	Other related spend
£263,859,000	TOTAL VISITOR RELATED SPEND
6,657	Estimated actual employment
4,866	FTE employment
11%	Proportion of all employment

## Teignbridge - 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	422	59	1,375	597	£84	£39
North Devon	965	58	4,139	360	£231	£22
Plymouth	640	78	2,120	635	£114	£36
Teignbridge	584	38	2,432	262	£122	£13
Torbay	1,021	95	3,750	580	£255	£39
Torridge	229	19	939	141	£51	£7



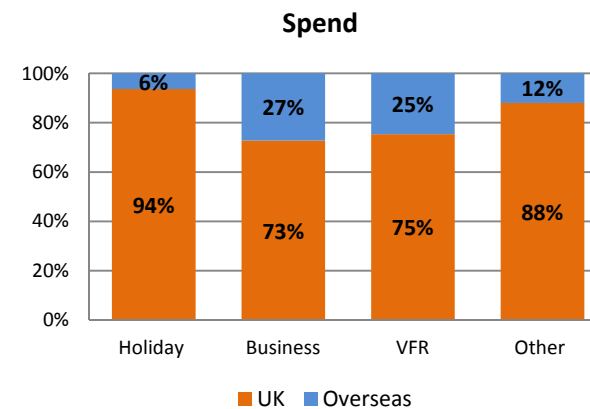
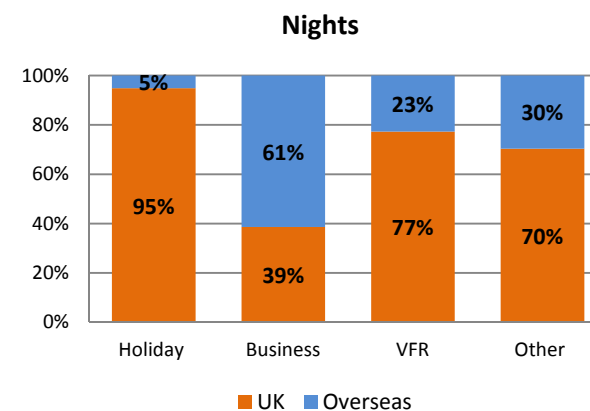
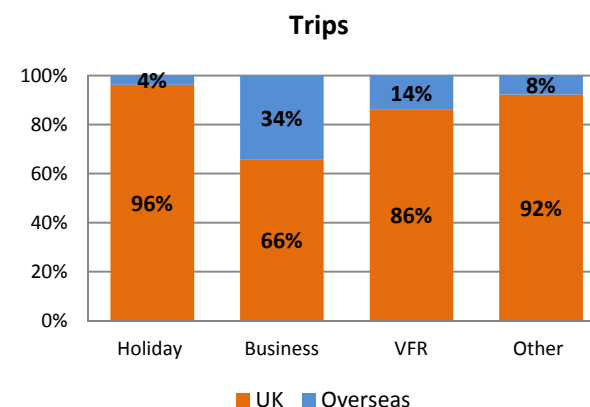
## Teignbridge - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	88,000	248,000	£23,959,000
Self catering	27,000	153,000	£12,054,000
Touring caravans /tents	97,000	470,000	£17,082,000
Static vans/holiday centres	178,000	851,000	£45,303,000
Group/campus	1,000	3,000	£125,000
Paying guest in private homes	0	0	£0
Second homes	11,000	61,000	£2,266,000
Boat moorings	1,000	3,000	£140,000
Other	5,000	15,000	£766,000
Staying with friends and relatives	176,000	628,000	£20,781,000
Total	584,000	2,432,000	£122,476,000

Overseas tourists	Trips	Nights	Spend
Serviced	10,700	40,000	£4,010,000
Self catering	1,300	14,800	£940,000
Touring caravans /tents	4,100	19,800	£893,000
Static vans/holiday centres	900	4,800	£279,000
Group/campus	300	5,500	£422,000
Paying guest in private homes	0	0	£0
Second homes	400	6,100	£333,000
Boat moorings	0	0	£0
Other	1,900	10,900	£274,000
Staying with friends and relatives	18,300	159,700	£5,880,000
Total	37,800	261,600	£13,030,000

## Teignbridge - Staying visits by purpose

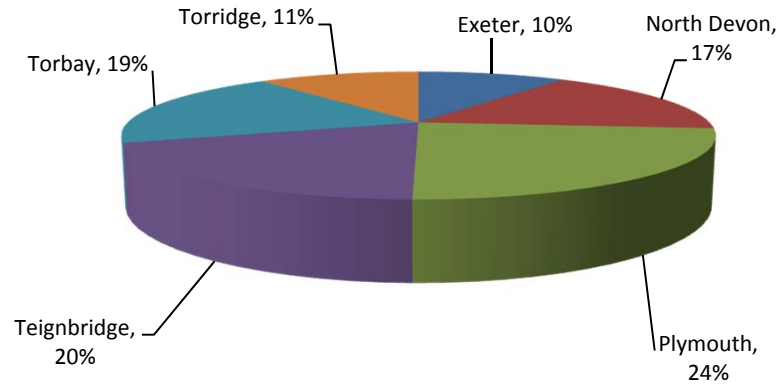
Domestic tourists	Trips	Nights	Spend
Holiday	514,000	2,226,000	£103,588,000
Business	21,000	58,000	£9,405,000
Visits to friends and relatives	37,000	106,000	£6,212,000
Other	13,000	42,000	£3,271,000
Study	0	0	£0
<b>Total</b>	<b>584,000</b>	<b>2,432,000</b>	<b>£122,476,000</b>



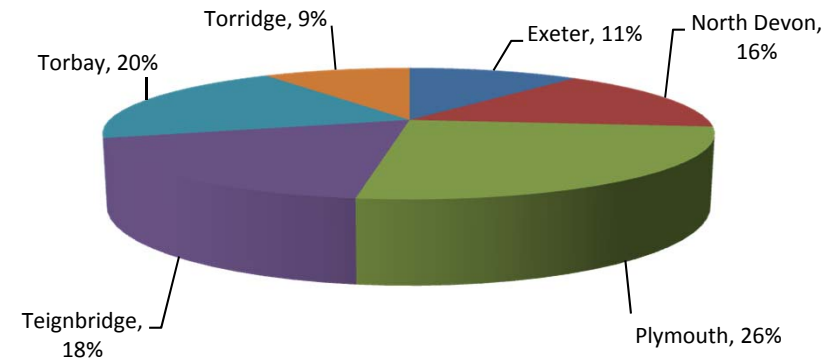
Overseas tourists	Trips	Nights	Spend
Holiday	19,800	120,700	£7,022,000
Business	11,000	92,200	£3,526,000
Visits to friends and relatives	5,900	31,100	£2,034,000
Other	1,100	17,700	£447,000
Study	0	0	£0
<b>Total</b>	<b>37,800</b>	<b>261,600</b>	<b>£13,030,000</b>

## Teignbridge - Day visits in the county context

All day visits



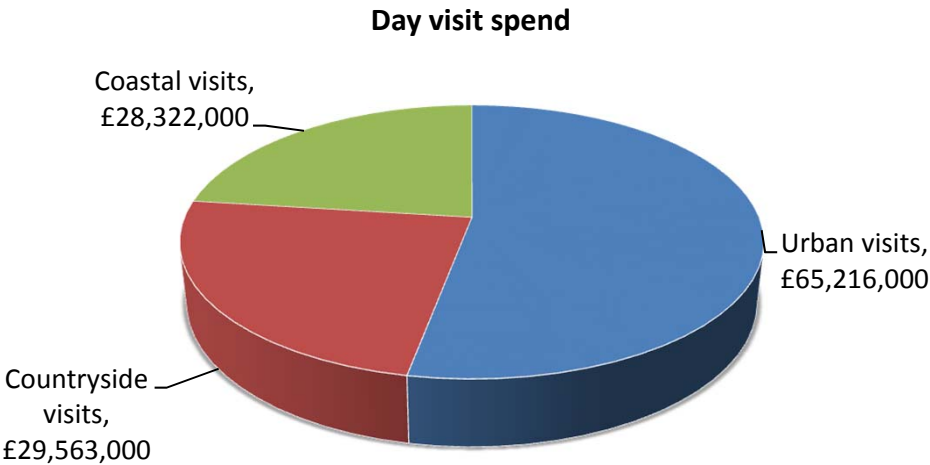
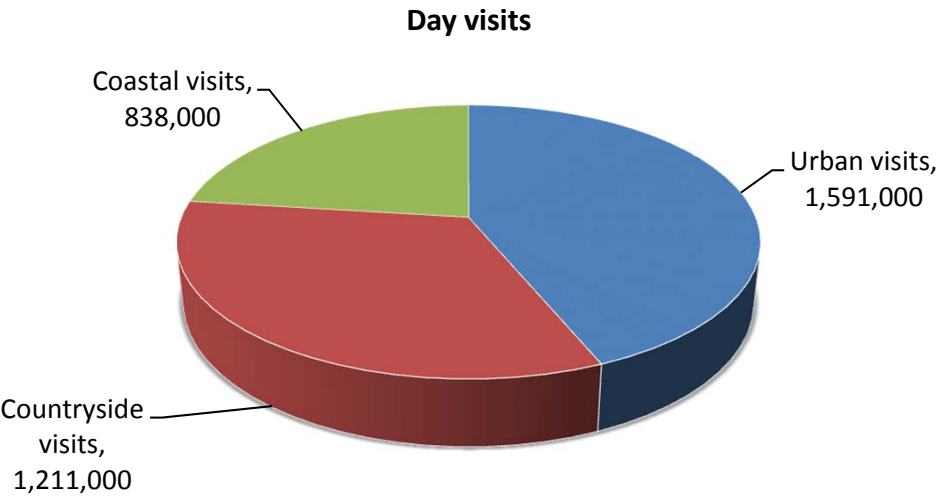
All day visit spend



Area	Day visits	Day visit spend
Exeter	1.8	£74.0
North Devon	3.1	£105.0
Plymouth	4.4	£172.3
Teignbridge	3.6	£123.1
Torbay	3.6	£133.8
Torridge	2.0	£63.8

# Teignbridge - Day visits by location

Total day visits	Total day visit spend
3,640,000	£123,101,000



## Teignbridge – Direct visitor expenditure by category



### Accommodation

- UK staying visitors £45,806,000
- Overseas staying visitors £4,457,000



### Shopping

- UK staying visitors £15,481,000
- Overseas staying visitors £3,309,000
- Day visitors £37,151,000



### Food & drink

- UK staying visitors £27,228,000
- Overseas staying visitors £2,869,000
- Day visitors £52,665,000



### Attractions/entertainment

- UK staying visitors £13,212,000
- Overseas staying visitors £1,111,000
- Day visitors £14,603,000



### Travel

- UK staying visitors £20,748,000
- Overseas staying visitors £1,284,000
- Day visitors £18,682,000

## Teignbridge – Other visitor related expenditure by category

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Second Homes

£808,000



Boats

£200,000



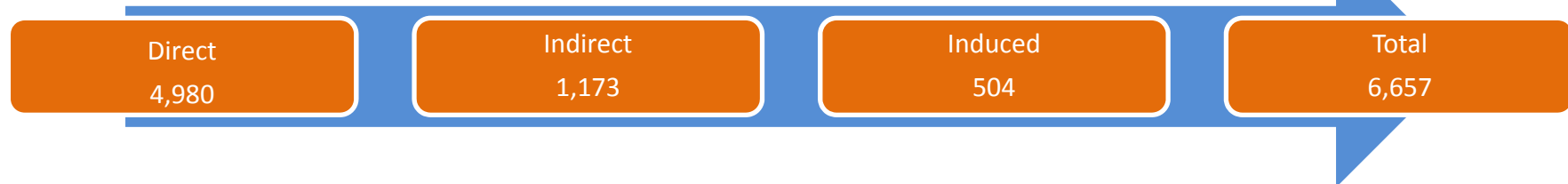
Visiting friends and relatives (non-visitor spend)

£4,244,000

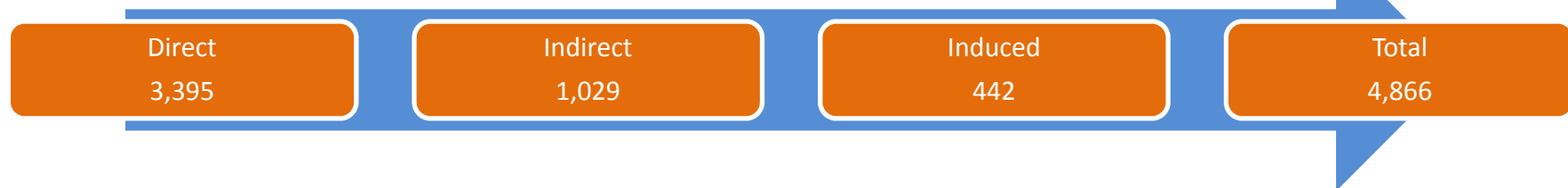
- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay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

## Teignbridge – 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	819	17	836
Retailing	177	349	526
Catering	444	776	1,220
Attractions/entertainment	271	284	555
Transport	95	80	175
Arising from non trip spend	83	0	83
<b>Total Direct</b>	<b>1,888</b>	<b>1,506</b>	<b>3,395</b>

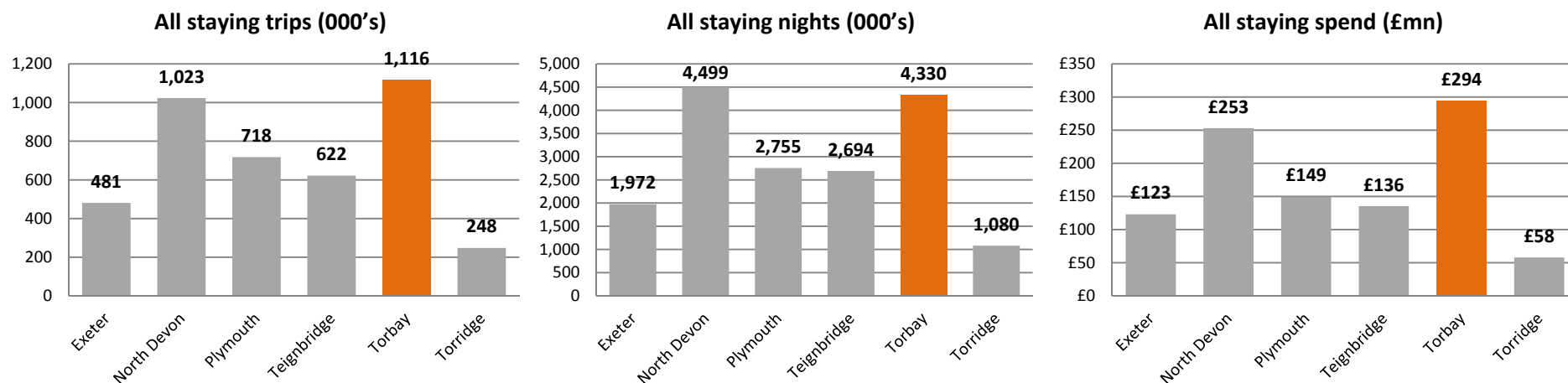
# Value of Tourism 2016

## Torbay

Key Facts	
1,115,600	Staying visitor trips
4,329,800	Staying visitor nights
£294,057,000	Staying visitor spend
3,568,000	Day visits
£133,802,000	Day visitor spend
£427,859,000	Direct visitor spend
£7,491,000	Other related spend
£435,350,000	TOTAL VISITOR RELATED SPEND
11,383	Estimated actual employment
8,330	FTE employment
19%	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	422	59	1,375	597	£84	£39
North Devon	965	58	4,139	360	£231	£22
Plymouth	640	78	2,120	635	£114	£36
Teignbridge	584	38	2,432	262	£122	£13
<b>Torbay</b>	<b>1,021</b>	<b>95</b>	<b>3,750</b>	<b>580</b>	<b>£255</b>	<b>£39</b>
Torridge	229	19	939	141	£51	£7

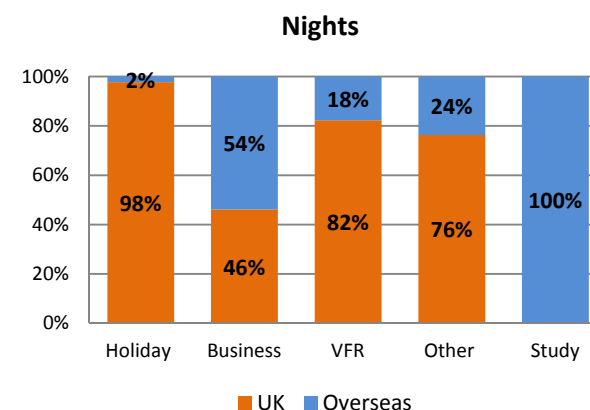
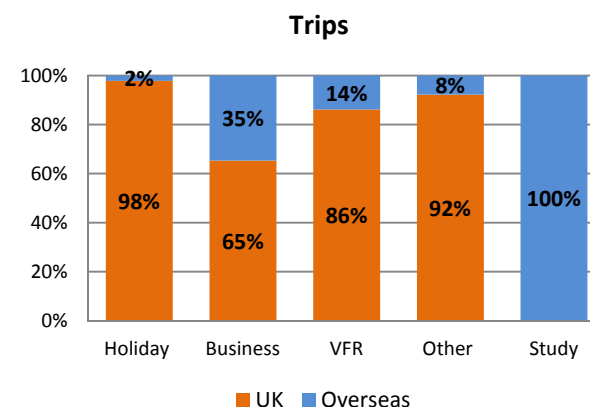
## Torbay - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	501,000	1,419,000	£136,925,000
Self catering	82,000	459,000	£36,226,000
Touring caravans /tents	39,000	189,000	£6,871,000
Static vans/holiday centres	191,000	911,000	£48,539,000
Group/campus	2,000	4,000	£193,000
Paying guest in private homes	0	0	£0
Second homes	13,000	68,000	£2,538,000
Boat moorings	7,000	33,000	£1,528,000
Other	5,000	16,000	£794,000
Staying with friends and relatives	182,000	651,000	£21,524,000
Total	1,021,000	3,750,000	£255,137,000

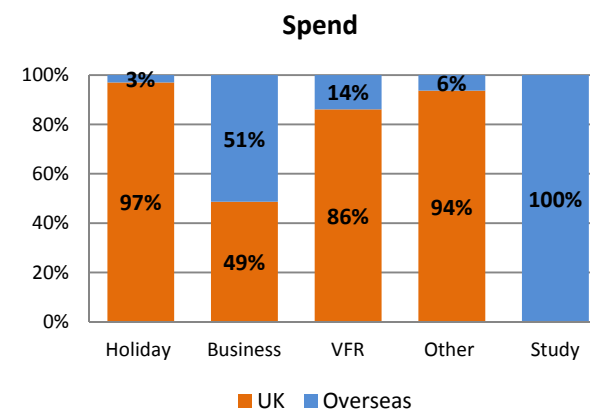
Overseas tourists	Trips	Nights	Spend
Serviced	61,100	228,900	£22,915,000
Self catering	3,900	44,500	£2,825,000
Touring caravans /tents	1,700	7,900	£359,000
Static vans/holiday centres	1,000	5,100	£299,000
Group/campus	400	8,400	£649,000
Paying guest in private homes	5,200	101,300	£5,126,000
Second homes	400	6,900	£373,000
Boat moorings	0	0	£0
Other	1,900	11,300	£284,000
Staying with friends and relatives	18,900	165,400	£6,090,000
Total	94,600	579,800	£38,920,000

## Torbay - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	847,000	3,303,000	£215,789,000
Business	123,000	310,000	£19,591,000
Visits to friends and relatives	38,000	99,000	£12,941,000
Other	13,000	39,000	£6,815,000
Study	0	0	£0
<b>Total</b>	<b>1,021,000</b>	<b>3,750,000</b>	<b>£255,137,000</b>

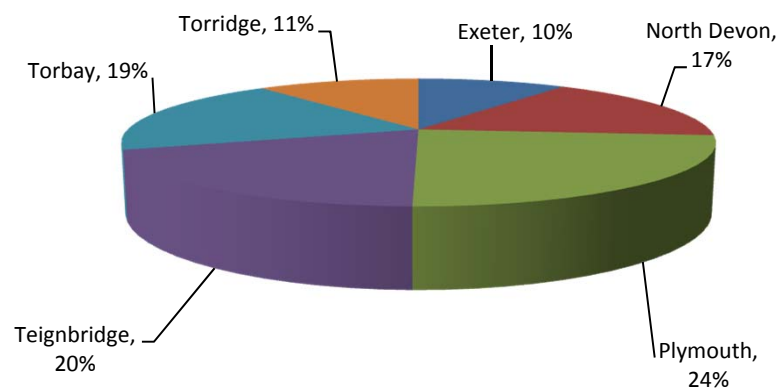


Overseas tourists	Trips	Nights	Spend
Holiday	18,900	76,400	£6,631,000
Business	65,300	361,800	£20,648,000
Visits to friends and relatives	6,100	21,300	£2,084,000
Other	1,100	12,100	£458,000
Study	3,100	108,100	£9,099,000
<b>Total</b>	<b>94,600</b>	<b>579,800</b>	<b>£38,920,000</b>

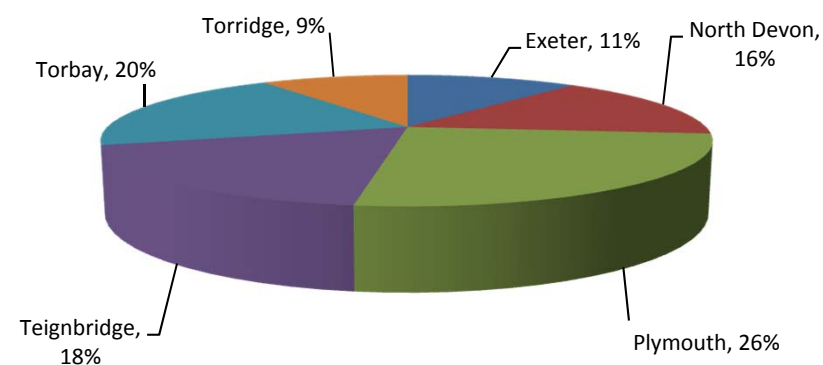


## Torbay - Day visits in the county context

All day visits



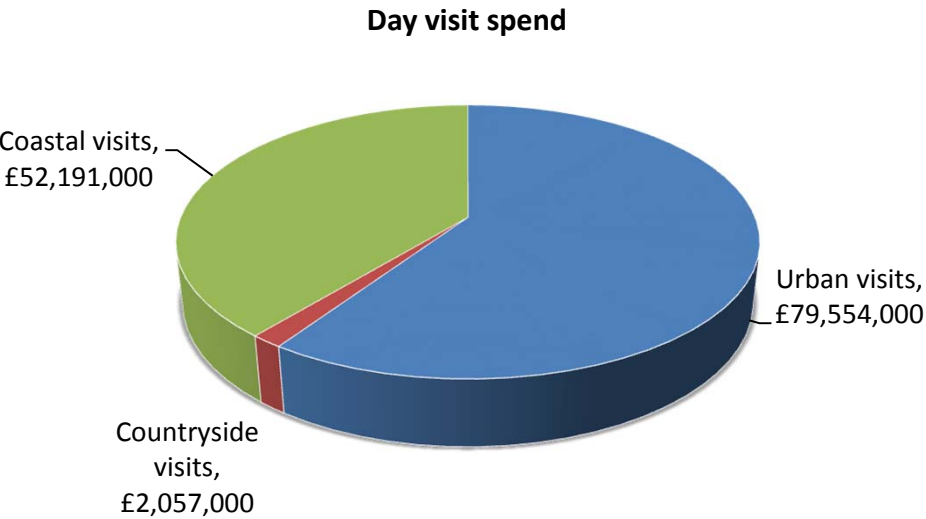
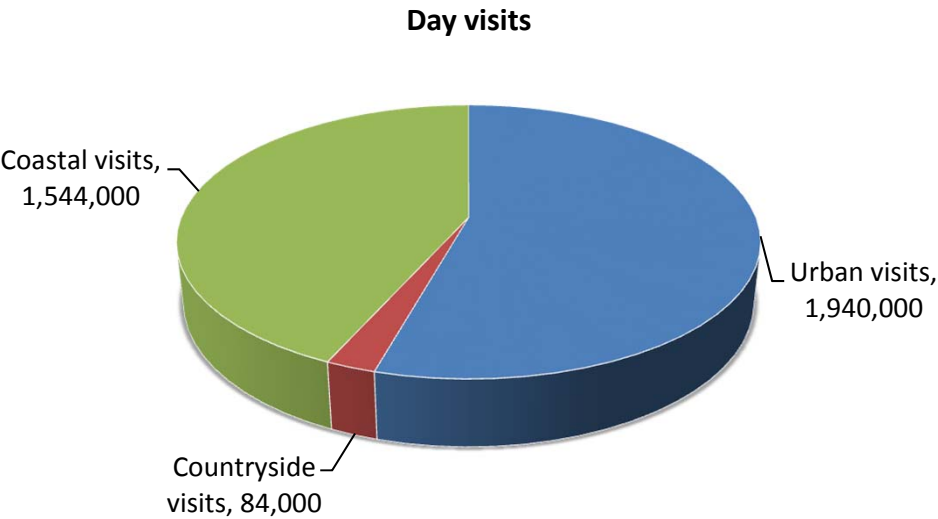
All day visit spend



Area	Day visits	Day visit spend
Exeter	1.8	£74.0
North Devon	3.1	£105.0
Plymouth	4.4	£172.3
Teignbridge	3.6	£123.1
Torbay	3.6	£133.8
Torridge	2.0	£63.8

# Torbay - Day visits by location

Total day visits	Total day visit spend
3,568,000	£133,802,000



## Torbay – Direct visitor expenditure by category



### Accommodation

- UK staying visitors £95,422,000
- Overseas staying visitors £14,631,000



### Shopping

- UK staying visitors £32,249,000
- Overseas staying visitors £8,885,000
- Day visitors £40,632,000



### Food & drink

- UK staying visitors £56,721,000
- Overseas staying visitors £7,440,000
- Day visitors £57,597,000



### Attractions/entertainment

- UK staying visitors £27,523,000
- Overseas staying visitors £4,506,000
- Day visitors £13,565,000



### Travel

- UK staying visitors £43,222,000
- Overseas staying visitors £3,458,000
- Day visitors £22,008,000

## Torbay – Other visitor related expenditure by category

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Second Homes

£905,000



Boats

£2,190,000



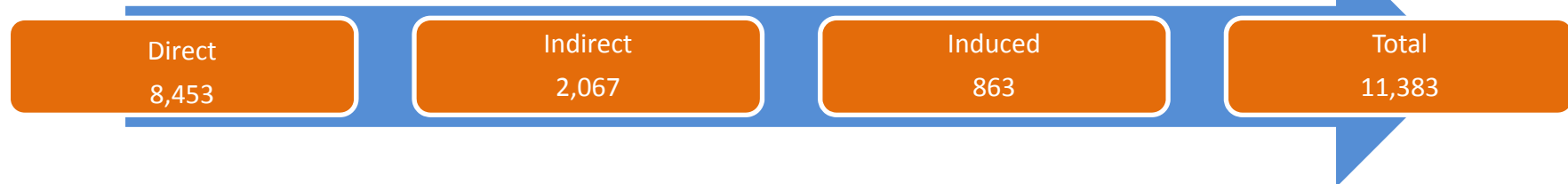
Visiting friends and relatives (non-visitor spend)

£4,396,000

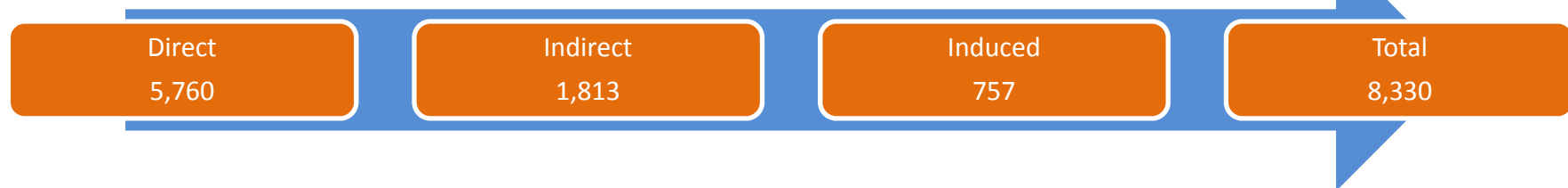
- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay 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	1,824	19	1,843
Retailing	394	389	782
Catering	963	864	1,827
Attractions/entertainment	616	271	887
Transport	205	96	301
Arising from non trip spend	119	0	119
Total Direct	4,121	1,639	5,760

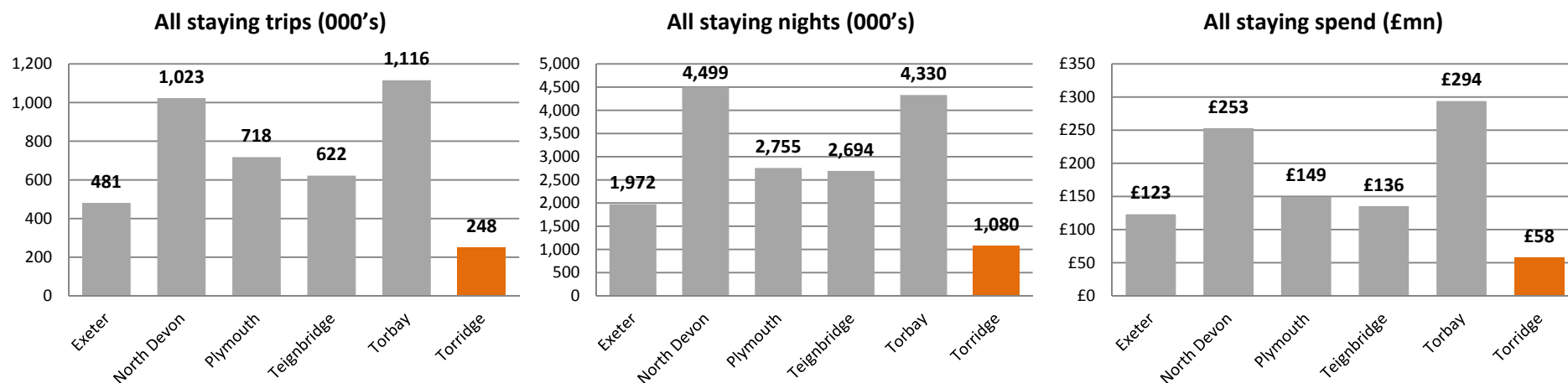


# Value of Tourism 2016

## Torridge

Key Facts	
247,500	Staying visitor trips
1,079,900	Staying visitor nights
£57,867,000	Staying visitor spend
1,989,000	Day visits
£63,790,000	Day visitor spend
£121,657,000	Direct visitor spend
£2,793,000	Other related spend
£124,450,000	TOTAL VISITOR RELATED SPEND
2,967	Estimated actual employment
2,116	FTE employment
10%	Proportion of all employment

## Torridge - 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	422	59	1,375	597	£84	£39
North Devon	965	58	4,139	360	£231	£22
Plymouth	640	78	2,120	635	£114	£36
Teignbridge	584	38	2,432	262	£122	£13
Torbay	1,021	95	3,750	580	£255	£39
Torridge	229	19	939	141	£51	£7

## Torridge - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	39,000	111,000	£10,711,000
Self catering	35,000	194,000	£15,333,000
Touring caravans /tents	22,000	107,000	£3,890,000
Static vans/holiday centres	31,000	147,000	£7,839,000
Group/campus	1,000	3,000	£147,000
Paying guest in private homes	0	0	£0
Second homes	8,000	46,000	£1,704,000
Boat moorings	0	0	£0
Other	3,000	8,000	£394,000
Staying with friends and relatives	90,000	323,000	£10,697,000
Total	229,000	939,000	£50,715,000

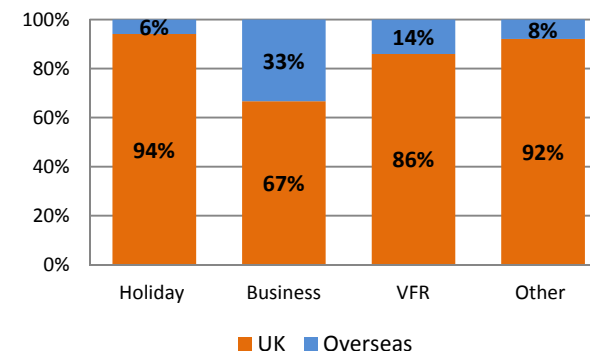
Overseas tourists	Trips	Nights	Spend
Serviced	4,800	17,900	£1,793,000
Self catering	1,600	18,800	£1,196,000
Touring caravans /tents	900	4,500	£203,000
Static vans/holiday centres	200	800	£48,000
Group/campus	300	6,400	£494,000
Paying guest in private homes	0	0	£0
Second homes	300	4,600	£251,000
Boat moorings	0	0	£0
Other	1,000	5,600	£141,000
Staying with friends and relatives	9,400	82,200	£3,027,000
Total	18,500	140,900	£7,152,000

## Torridge - Staying visits by purpose

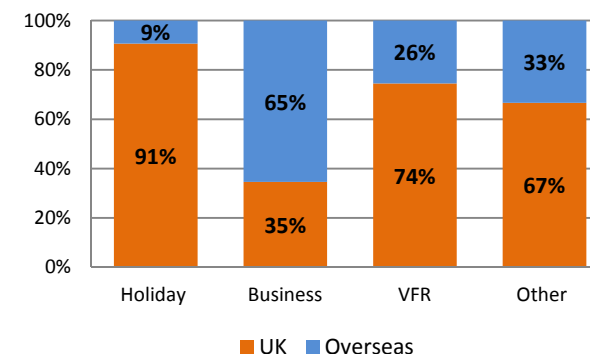
Domestic tourists	Trips	Nights	Spend
Holiday	199,000	851,000	£42,894,000
Business	5,000	13,000	£3,894,000
Visits to friends and relatives	19,000	54,000	£2,572,000
Other	7,000	21,000	£1,355,000
Study	0	0	£0
<b>Total</b>	<b>229,000</b>	<b>939,000</b>	<b>£50,715,000</b>

Overseas tourists	Trips	Nights	Spend
Holiday	12,400	87,300	£4,845,000
Business	2,500	24,600	£896,000
Visits to friends and relatives	3,100	18,500	£1,157,000
Other	600	10,500	£254,000
Study	0	0	£0
<b>Total</b>	<b>18,500</b>	<b>140,900</b>	<b>£7,152,000</b>

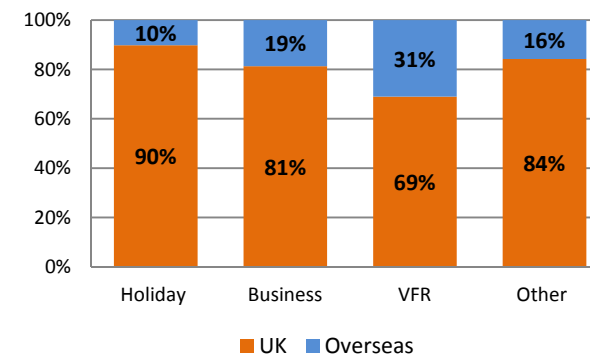
Trips



Nights

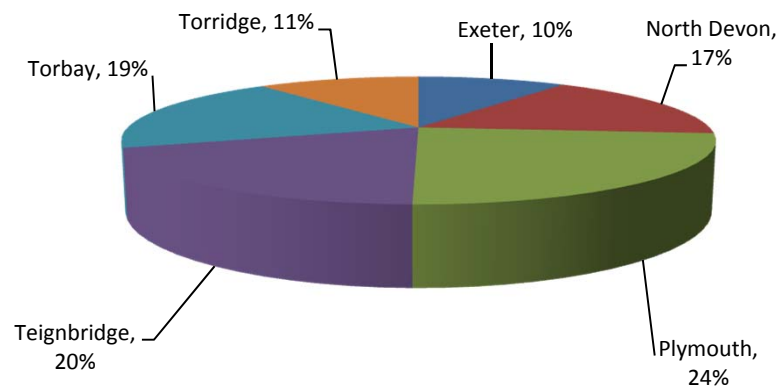


Spend

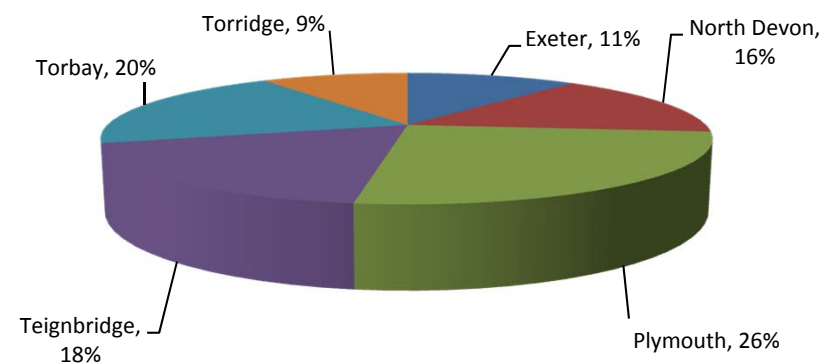


## Torridge - Day visits in the county context

All day visits



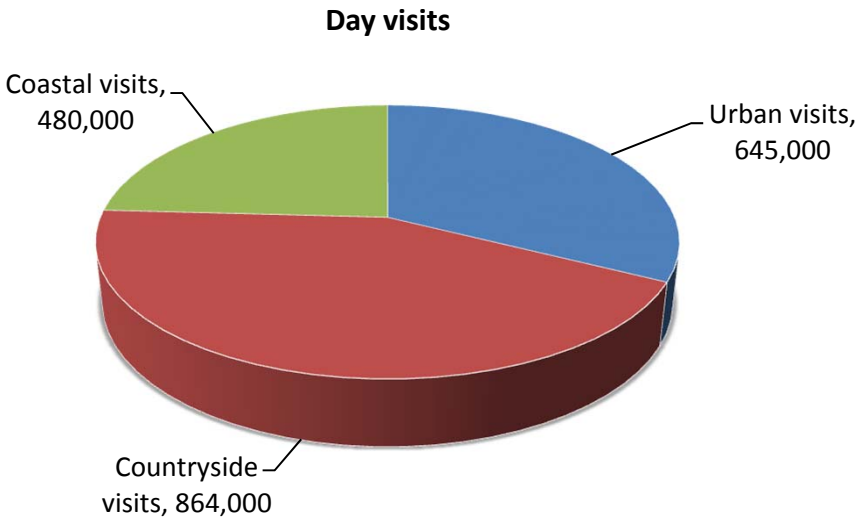
All day visit spend



Area	Day visits	Day visit spend
Exeter	1.8	£74.0
North Devon	3.1	£105.0
Plymouth	4.4	£172.3
Teignbridge	3.6	£123.1
Torbay	3.6	£133.8
Torridge	2.0	£63.8

# Torridge - Day visits by location

Total day visits	Total day visit spend
1,989,000	£63,790,000



## Torridge – Direct visitor expenditure by category



### Accommodation

- UK staying visitors £18,968,000
- Overseas staying visitors £2,311,000



### Shopping

- UK staying visitors £6,410,000
- Overseas staying visitors £1,944,000
- Day visitors £17,276,000



### Food & drink

- UK staying visitors £11,275,000
- Overseas staying visitors £1,603,000
- Day visitors £28,065,000



### Attractions/entertainment

- UK staying visitors £5,471,000
- Overseas staying visitors £593,000
- Day visitors £8,066,000



### Travel

- UK staying visitors £8,592,000
- Overseas staying visitors £702,000
- Day visitors £10,381,000

## Torridge – Other visitor related expenditure by category

---



Second Homes

£608,000



Boats

£0



Visiting friends and relatives (non-visitor spend)

£2,185,000

- 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.



## Torridge – 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	370	10	379
Retailing	84	173	257
Catering	202	441	644
Attractions/entertainment	122	166	289
Transport	43	48	90
Arising from non trip spend	44	0	44
<b>Total Direct</b>	<b>865</b>	<b>838</b>	<b>1,703</b>