The Economic Impact of the Torbay Visitor Economy 2025

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

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Introduction

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in Torbay and Devon county and districts in 2025 (it should be noted that only those districts participating in the project are displayed).

The figures were derived using the Cambridge Economic Impact Model undertaken by The South West Research Company (TSWRC). The model utilises information from national tourism surveys and regionally/locally based data. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level.

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

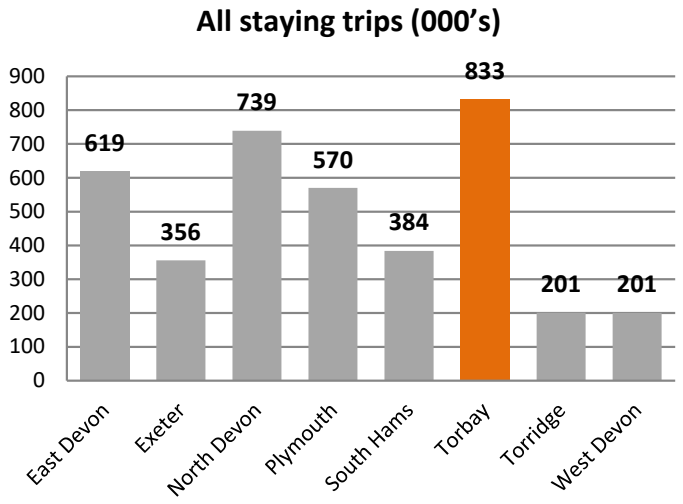
For an overview of 2025, including key facts about the economy, weather and key events please see Appendix 2 of this report.

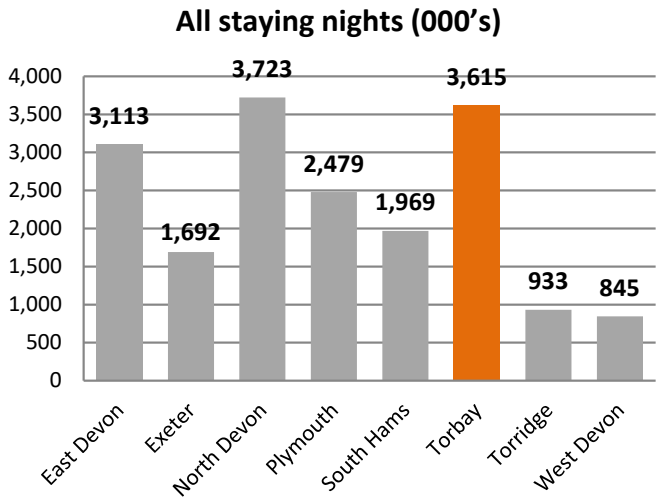
Value of Tourism 2025

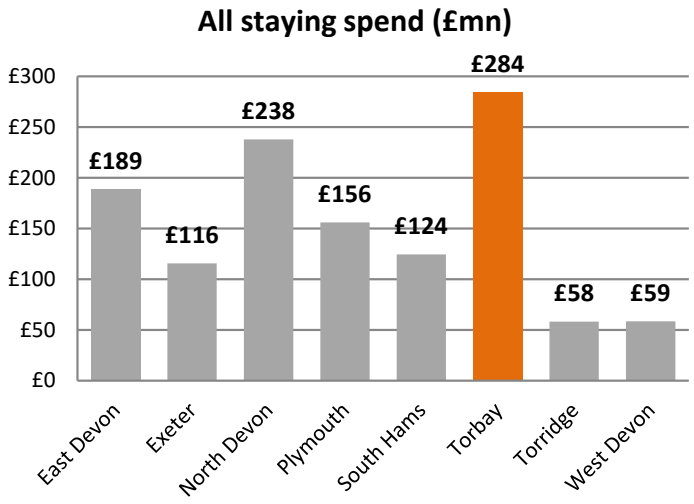
Torbay

Key Facts	
832,500	Staying visitor trips
3,615,100	Staying visitor nights
£284,129,000	Staying visitor spend
2,952,000	Day visits
£146,651,000	Day visitor spend
£430,780,000	Direct visitor spend
£13,280,142	Other related spend
£444,060,142	TOTAL VISITOR RELATED SPEND
7,883	Estimated actual employment
5,840	FTE employment
13%	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)
East Devon	572	47	2,731	382	£165	£25
Exeter	304	52	1,044	648	£70	£45
North Devon	683	56	3,348	375	£210	£28
Plymouth	494	76	1,718	761	£106	£51
South Hams	349	35	1,679	290	£105	£20
Torbay	**744**	**89**	**3,044**	**571**	**£235**	**£49**
Torridge	181	20	781	152	£48	£10
West Devon	178	23	687	158	£47	£12

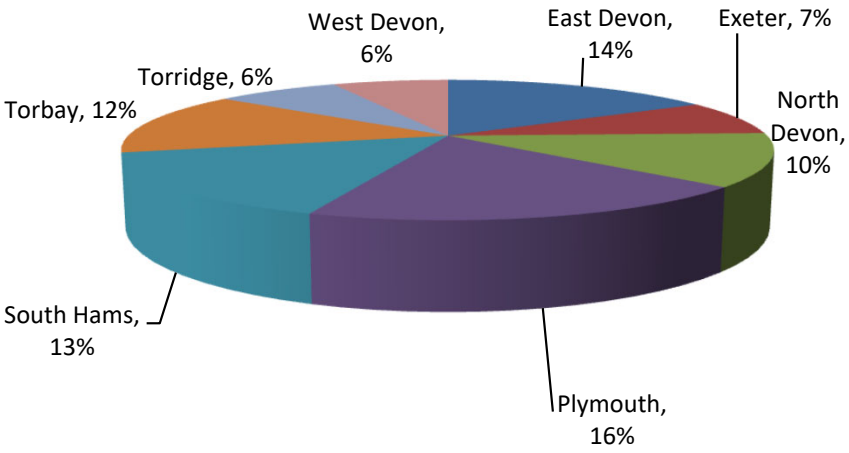
Torbay - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	364,000	1,183,000	£128,675,000
Self catering	71,000	451,000	£37,154,000
Touring caravans /tents	29,000	162,000	£7,284,000
Static vans/holiday centres	112,000	654,000	£38,476,000
Group/campus	1,000	2,000	£144,000
Paying guest in private homes	0	0	£0
Second homes	13,000	64,000	£2,260,000
Boat moorings	7,000	31,000	£1,884,000
Other	5,000	9,000	£534,000
Staying with friends and relatives	143,000	489,000	£18,845,000
Total	744,000	3,044,000	£235,257,000

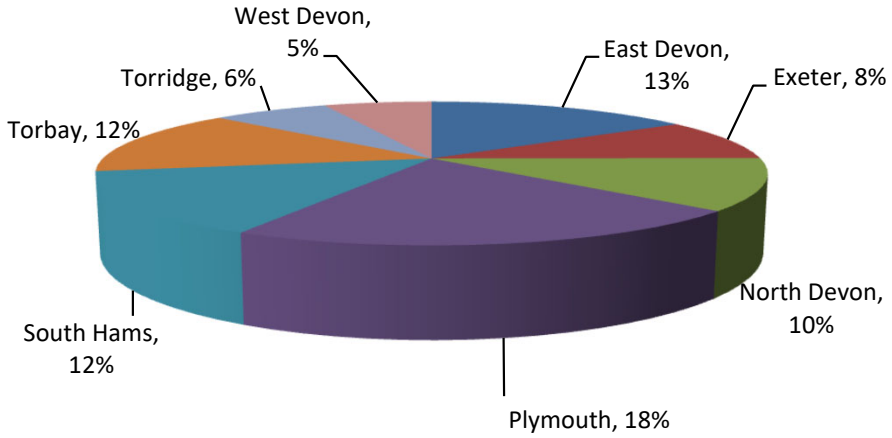
Overseas tourists	Trips	Nights	Spend
Serviced	53,800	211,400	£28,104,000
Self catering	5,100	53,900	£4,364,000
Touring caravans /tents	1,700	8,800	£531,000
Static vans/holiday centres	1,000	6,800	£521,000
Group/campus	200	6,400	£467,000
Paying guest in private homes	3,300	85,900	£5,442,000
Second homes	800	9,900	£545,000
Boat moorings	0	0	£0
Other	1,800	4,700	£144,000
Staying with friends and relatives	20,900	183,400	£8,755,000
Total	88,500	571,100	£48,872,000

Torbay - Day visits in the county context

All day visits



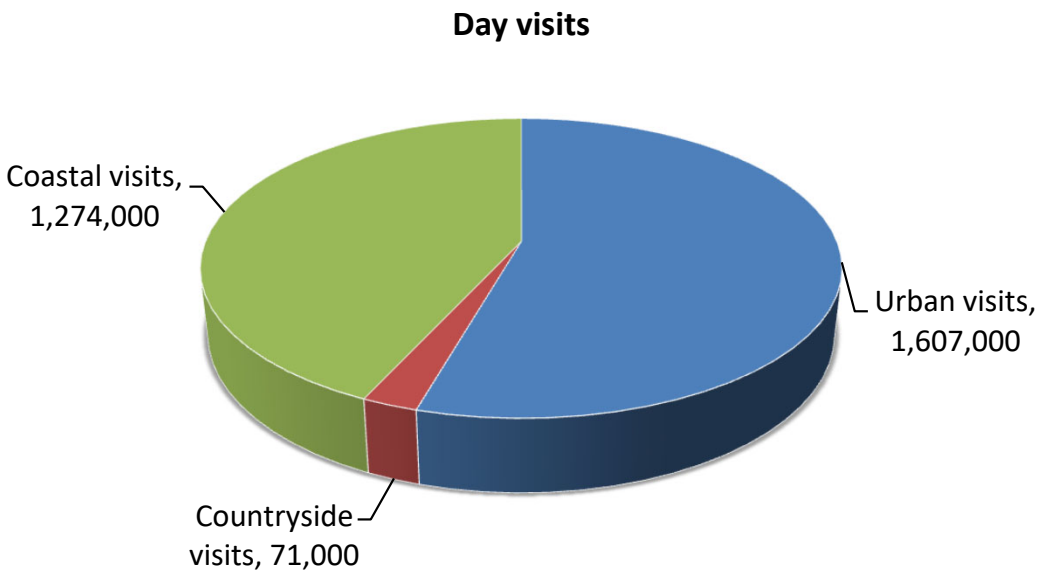
All day visit spend

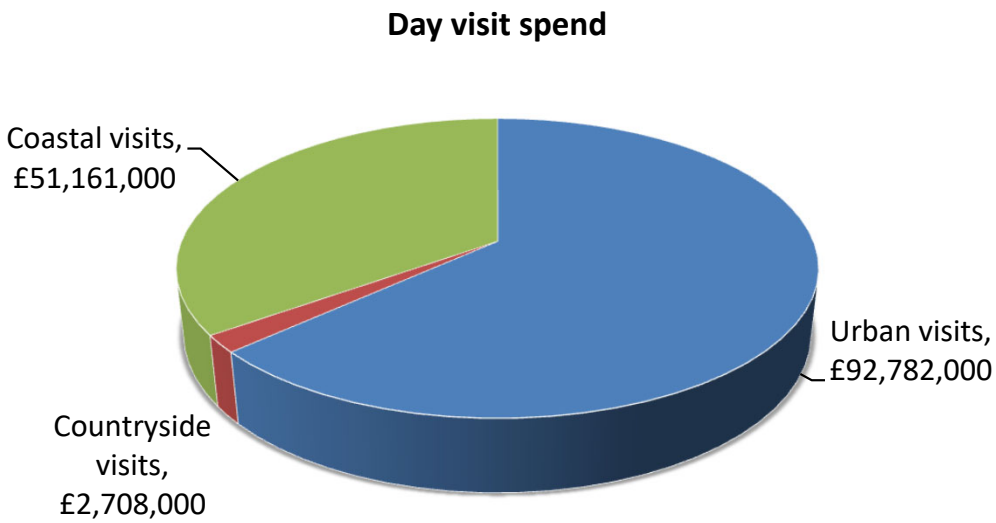


Area	Day visits (mn)	Day visit spend (£mn)
East Devon	3.4	£156.8
Exeter	1.6	£93.0
North Devon	2.5	£116.4
Plymouth	3.9	£214.5
South Hams	3.2	£143.6
Torbay	**3.0**	**£146.7**
Torridge	1.5	£68.9
West Devon	1.4	£63.9

Torbay - Day visits by location

Total day visits	Total day visit spend
2,952,000	£146,651,000





Torbay - Direct visitor expenditure by category

Information on the breakdown of visitor spending is available from the three main tourism and day visitor surveys by type of visitor. The Model divides the expenditure between five sectors:

- Accommodation
- Shopping for gifts, clothes and other goods
- Eating and drinking in restaurants, cafes and inns
- Entry to attractions, entertainment and hire of goods and services
- Transport and travel costs including public transport, purchase of fuel and parking

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

By applying the expenditure breakdown to the estimates of visitor spending the Model generates estimates of total spending by the five business sectors. Visitor expenditure in each sector represents additional turnover for businesses in those sectors. However, evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover. In particular, some expenditure on food and drink actually takes place in inns and hotels that fall into the accommodation sector and at attractions. The turnover for each business sector has therefore been adjusted to take account of these marginal changes. More significantly, expenditure on travel costs associated with individual trips is as likely to take place at the origin of the trip as it is at the actual destination. It is therefore assumed that only 60% of total travel expenditure accrues to the destination area.

Torbay – Direct visitor expenditure by category



Accommodation

- UK staying visitors £102,805,000
- Overseas staying visitors £11,876,000

Totals

£114,681,000 (27%)



Shopping

- UK staying visitors £32,716,000
- Overseas staying visitors £16,093,000
- Day visitors £43,723,000

£92,532,000 (21%)



Food & drink

- UK staying visitors £43,338,000
- Overseas staying visitors £10,889,000
- Day visitors £60,316,000

£114,543,000 (27%)



Attractions/entertainment

- UK staying visitors £21,332,000
- Overseas staying visitors £5,042,000
- Day visitors £15,127,000

£41,501,000 (10%)



Travel

- UK staying visitors £35,066,000
- Overseas staying visitors £4,972,000
- Day visitors £27,484,000

£67,522,000 (16%)

Torbay – Other visitor related expenditure by category



Second Homes

£1,250,000



Boats

£2,875,000



Static vans

£428,000



Visiting friends and relatives (non-visitor spend)

£9,155,000

- 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.
- Static van spend arises in the case of vans purchased by the owner and used as a second home.
- Additional spending is incurred by friends and relatives as a result of people coming to stay with them.

Torbay – Tourism related employment

Having identified the value of turnover generated by visitor spending in each business sector it is possible to estimate the employment associated with that spending.

The use of visitor expenditure to generate job numbers underestimates the number of jobs arising in the attractions/entertainment sector. The underestimate arises because local authorities and voluntary bodies do not always seek to recoup the full operating costs of individual attractions 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.

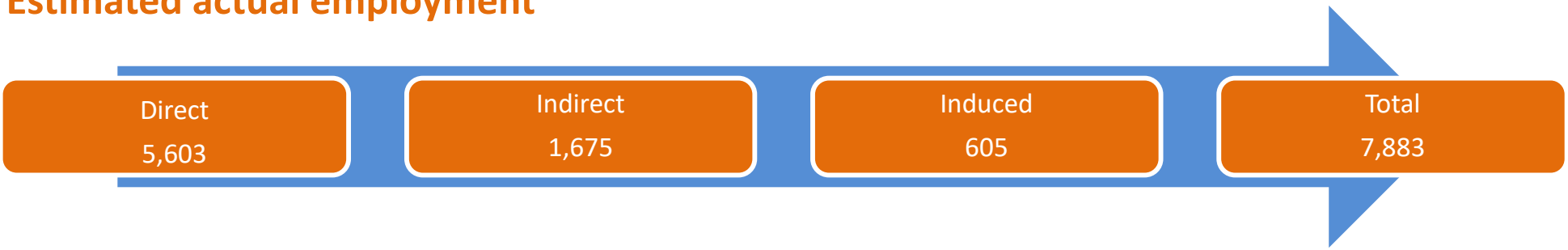
- **Indirect Jobs** - Indirect employment arises as a result of expenditure by businesses in direct receipt of visitor expenditure on the purchase of goods and services for their businesses. For example, some of the employment at a business supplying food and drink may be supported through the supplies 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.

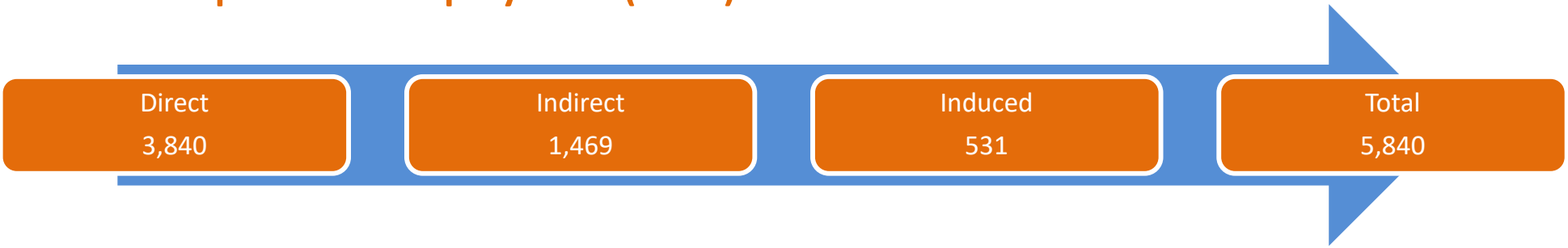
Estimates are shown for actual jobs and full time equivalent jobs (FTE's).

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	1,310	14	1,324
Retailing	291	261	552
Catering	493	549	1,042
Attractions/entertainment	344	203	546
Transport	120	82	202
Arising from non trip spend	174	0	174
Total Direct	2,732	1,108	3,840

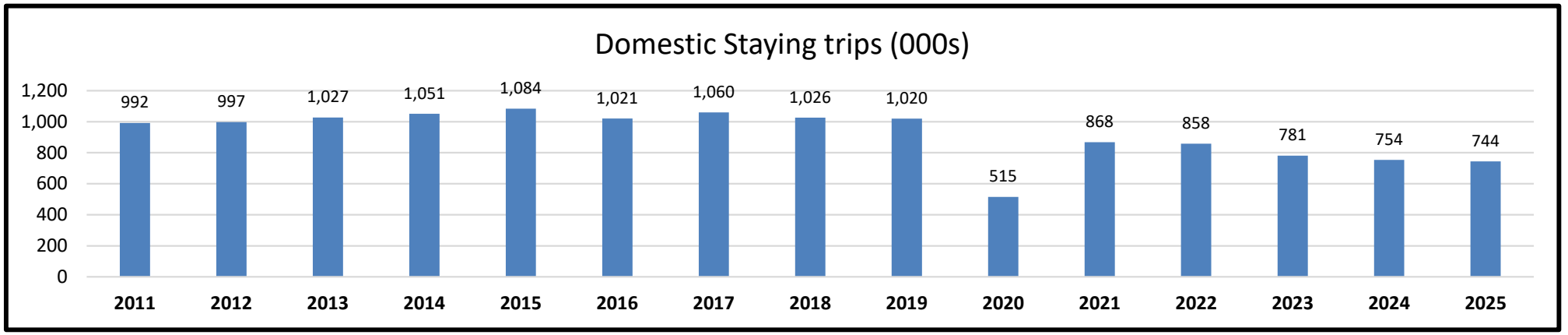
Trend data

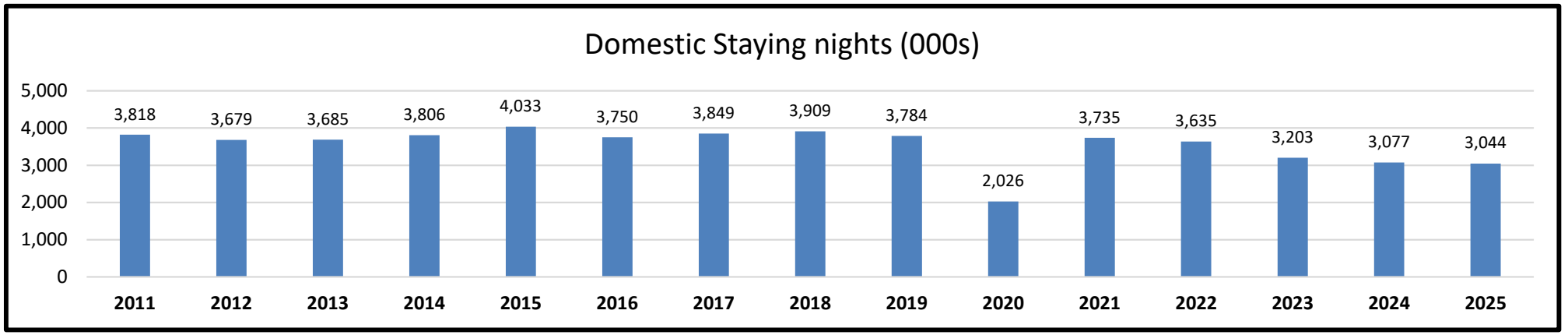


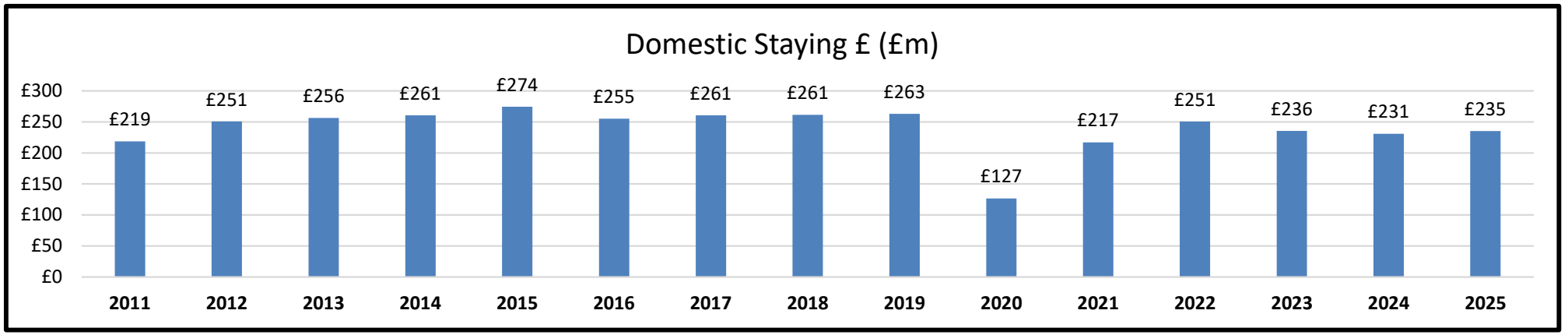




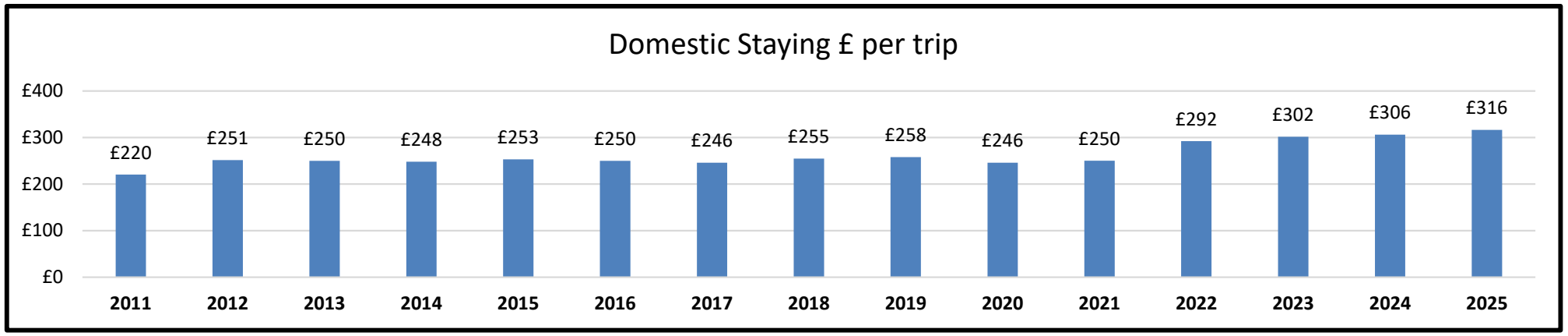
Torbay – Domestic staying

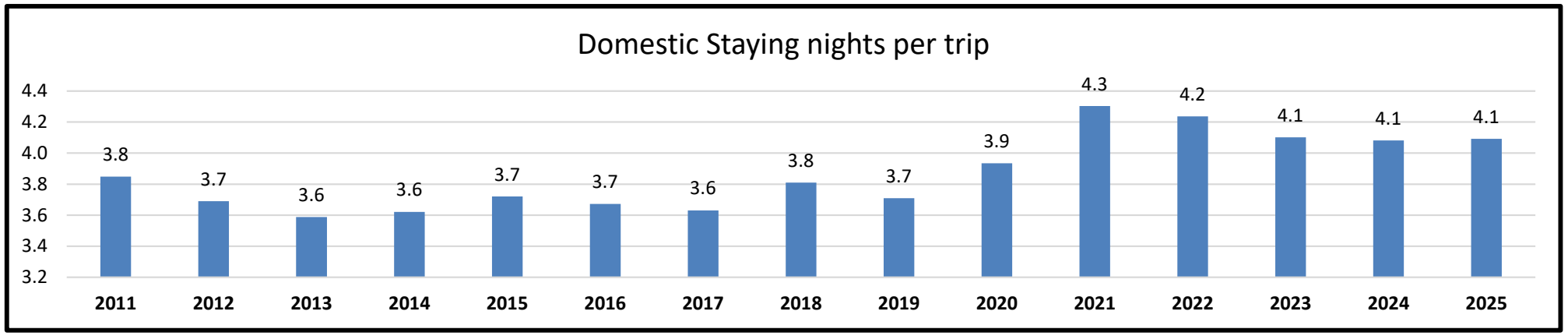


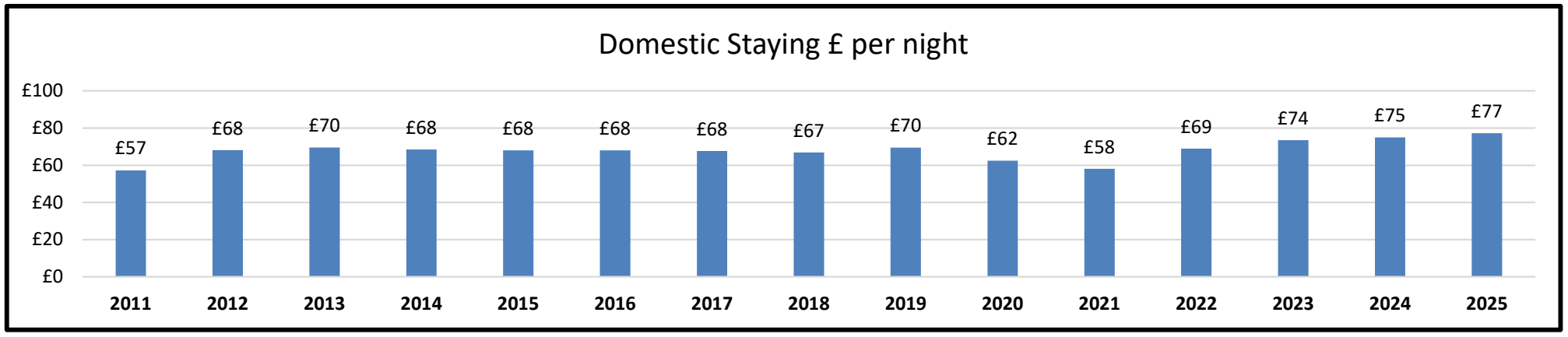




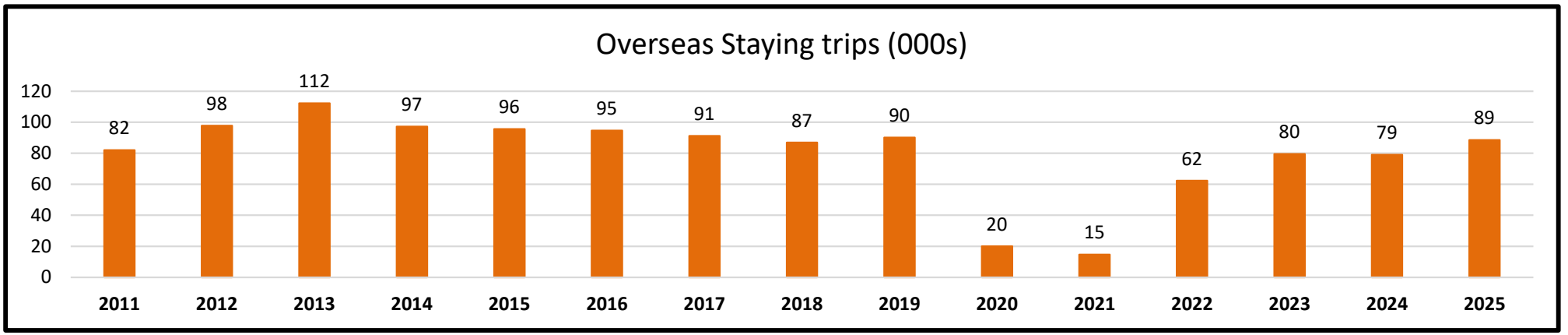
Torbay – Domestic staying

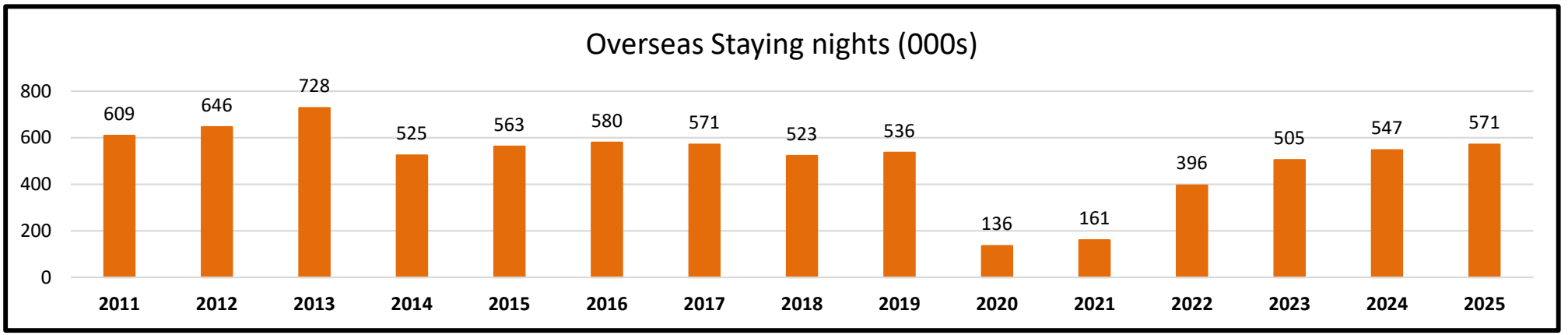


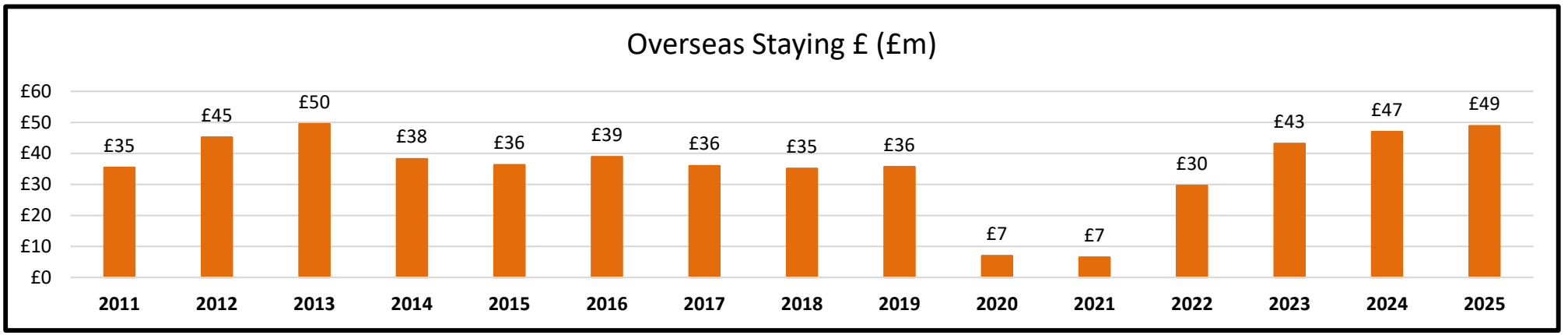




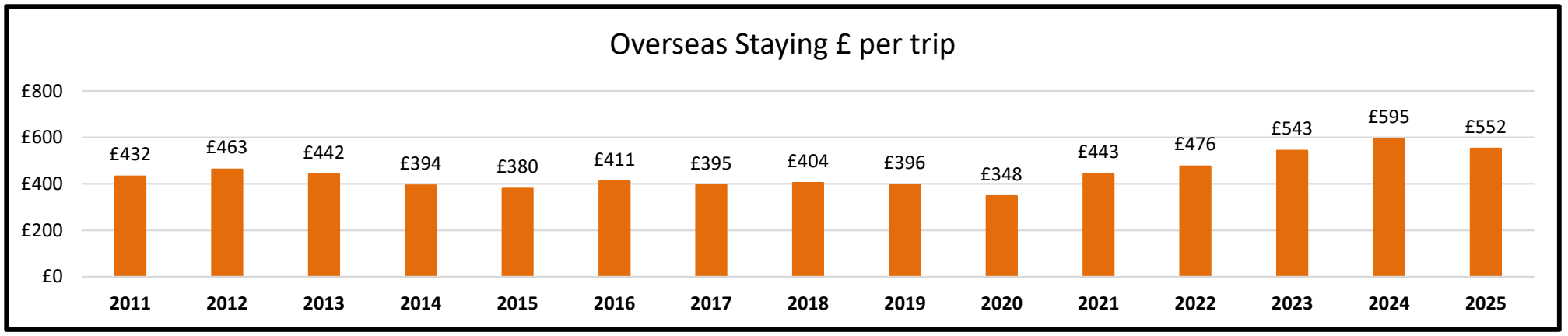
Torbay – Overseas staying

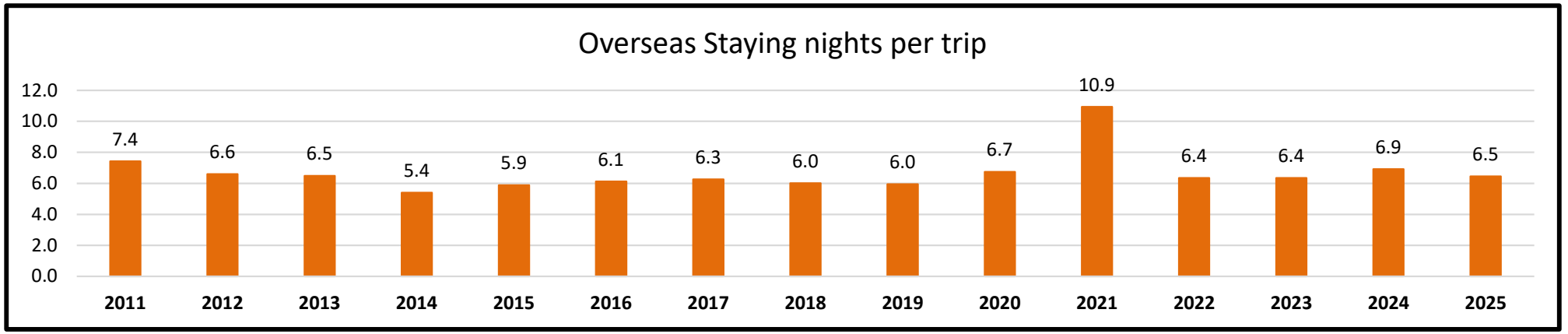


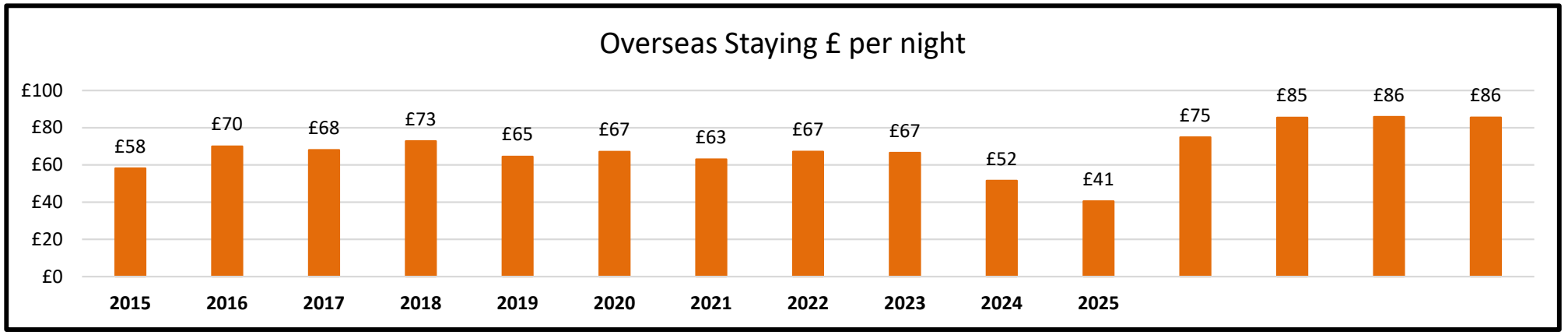




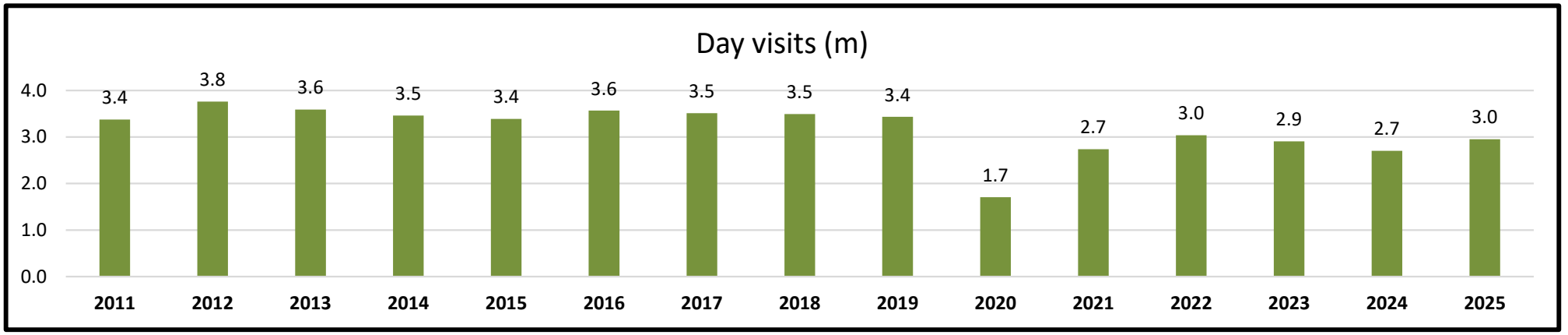
Torbay – Overseas staying

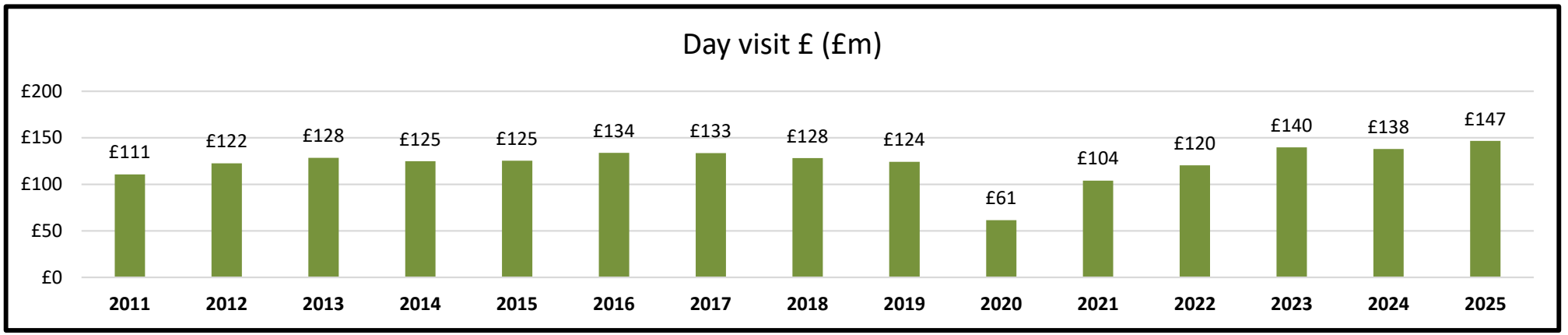


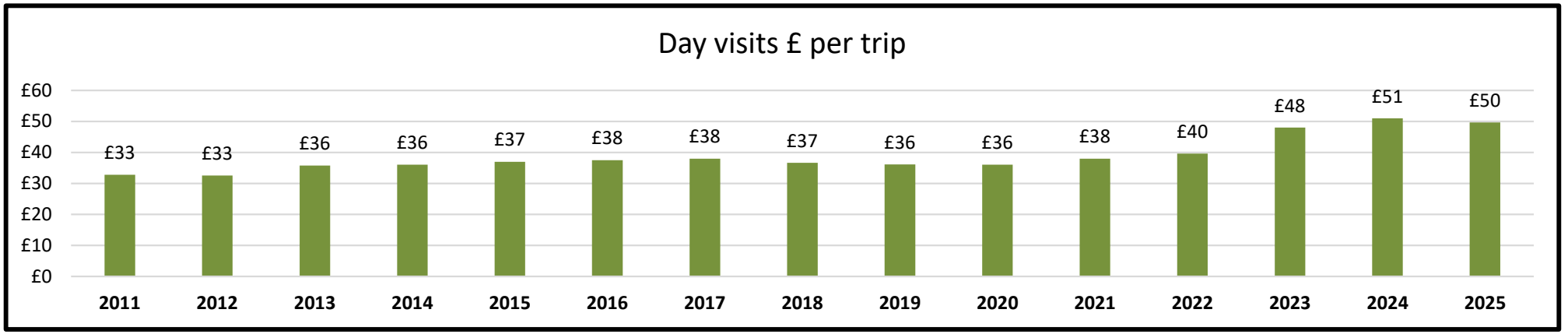




Torbay – Day visits



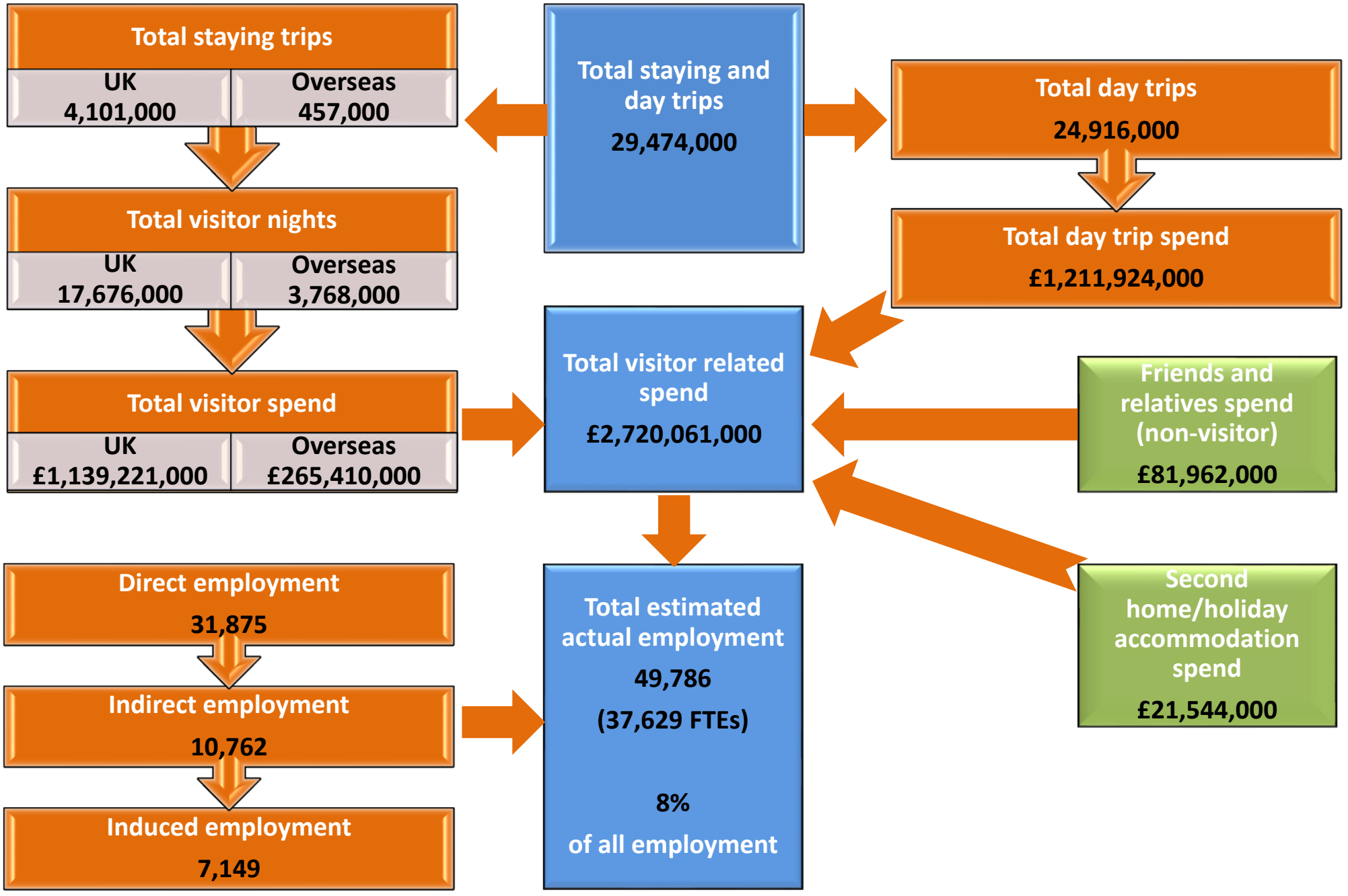




Devon 2025



Devon - Key facts at a glance



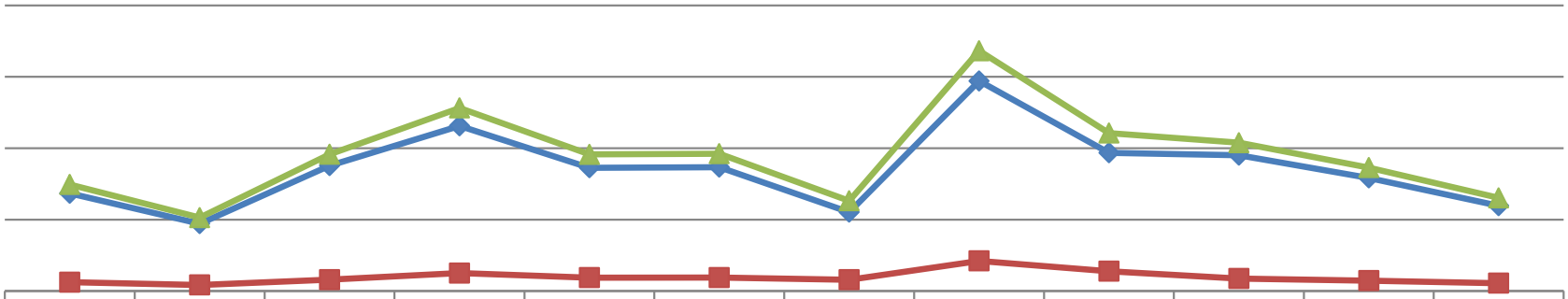
Devon - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	1,054,000	3,423,000	£372,400,000
Self catering	405,000	2,558,000	£210,953,000
Touring caravans /tents	425,000	2,406,000	£108,450,000
Static vans/holiday centres	685,000	4,009,000	£236,033,000
Group/campus	81,000	225,000	£14,044,000
Paying guest in private homes	0	0	£0
Second homes	98,000	485,000	£17,116,000
Boat moorings	24,000	110,000	£6,724,000
Other	49,000	85,000	£4,783,000
Staying with friends and relatives	1,281,000	4,374,000	£168,718,000
Total	4,101,000	17,676,000	£1,139,221,000

Overseas tourists	Trips	Nights	Spend
Serviced	156,000	612,000	£81,335,000
Self catering	29,000	306,000	£24,779,000
Touring caravans /tents	25,000	131,000	£7,905,000
Static vans/holiday centres	6,000	42,000	£3,243,000
Group/campus	21,000	622,000	£45,610,000
Paying guest in private homes	11,000	296,000	£18,744,000
Second homes	6,000	75,000	£4,126,000
Boat moorings	0	0	£0
Other	16,000	42,000	£1,285,000
Staying with friends and relatives	187,000	1,642,000	£78,384,000
Total	457,000	3,768,000	£265,410,000

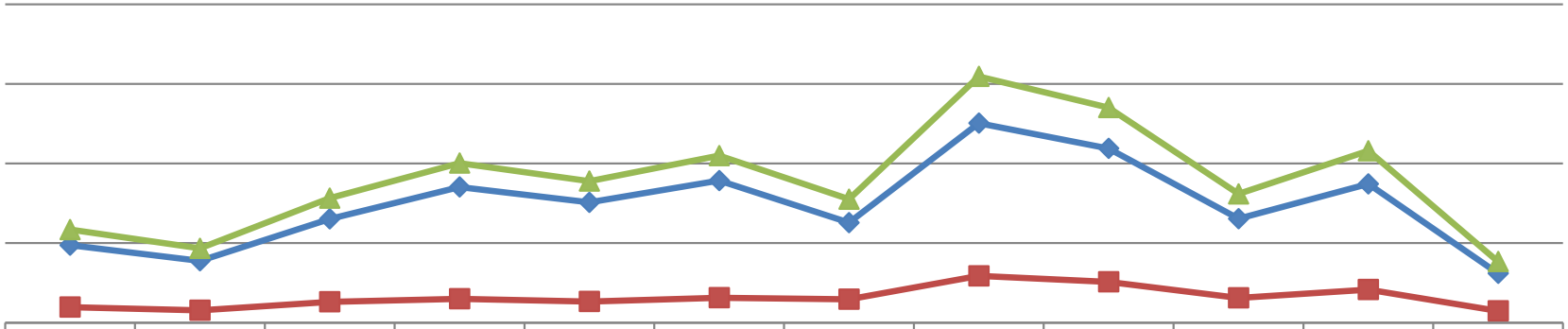
Devon - Estimated seasonality of staying visits

Seasonality - trips



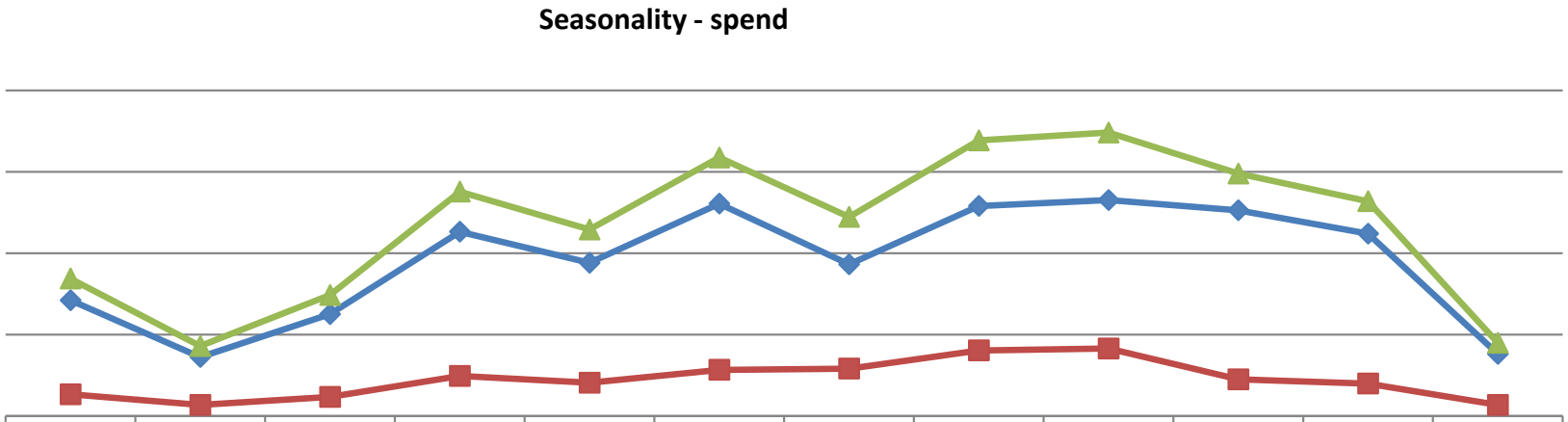
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK trips (000's)	273.7	188.6	351.2	462.6	345.3	347.0	221.1	588.3	387.1	380.5	316.7	239.0
OS trips (000's)	24.8	17.1	31.8	50.2	37.5	37.7	31.7	84.5	55.6	35.0	29.1	22.0
Total trips (000's)	298.5	205.7	383.0	512.8	382.8	384.7	252.8	672.8	442.6	415.5	345.8	261.0

Seasonality - nights



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK nights (000's)	972.9	776.9	1303.2	1704.3	1512.2	1785.1	1257.2	2506.3	2189.2	1306.1	1743.1	619.6
OS nights (000's)	195.6	156.2	262.0	300.1	266.3	314.4	294.8	587.7	513.3	312.4	416.9	148.2
Total nights (000's)	1168.5	933.1	1565.2	2004.5	1778.5	2099.5	1552.0	3093.9	2702.5	1618.5	2160.0	767.8

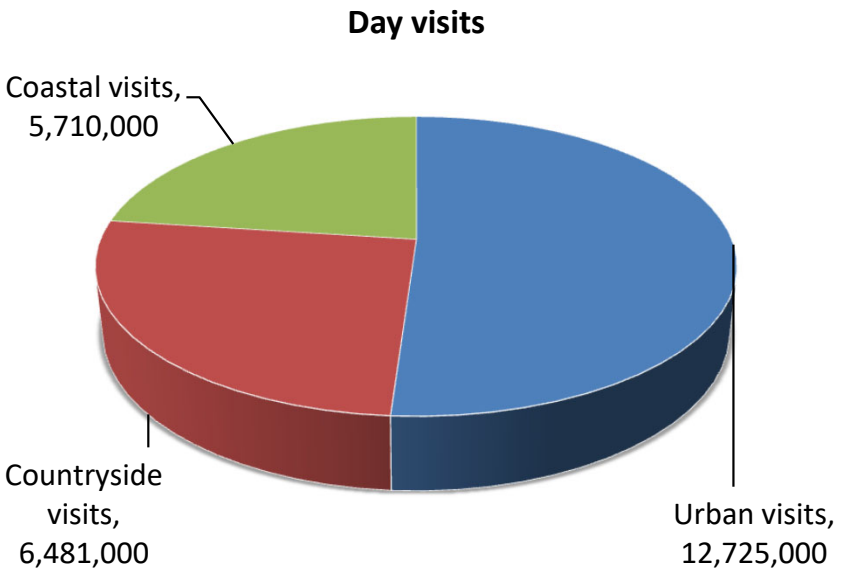
Devon - Estimated seasonality of staying visits

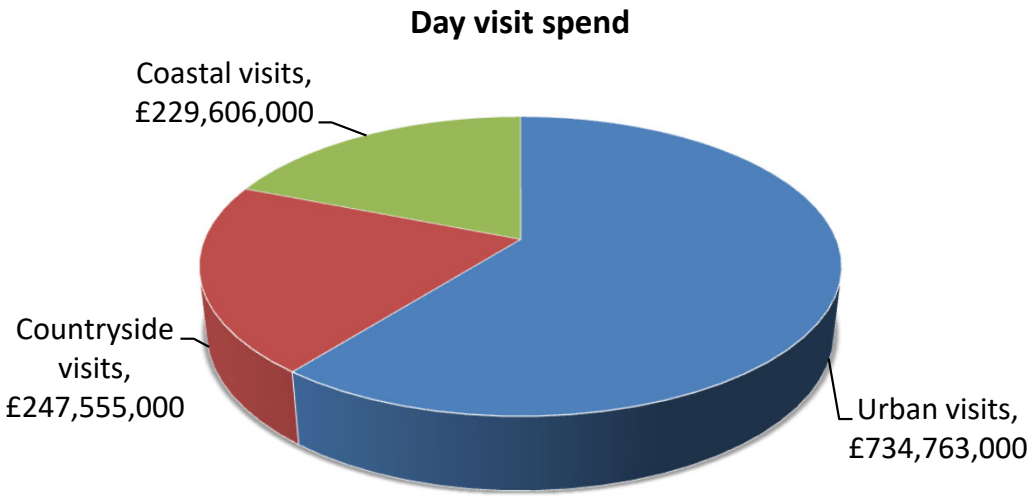


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK spend (mn's)	71.1	36.2	62.6	113.2	94.1	130.4	93.2	129.0	132.7	126.4	112.0	38.2
OS spend (mn's)	13.3	6.8	11.7	24.6	20.5	28.4	29.1	40.3	41.5	22.5	19.9	6.8
Total spend (mn's)	84.4	43.0	74.3	137.8	114.6	158.8	122.3	169.3	174.1	148.9	132.0	45.0

Devon - Day visits by location

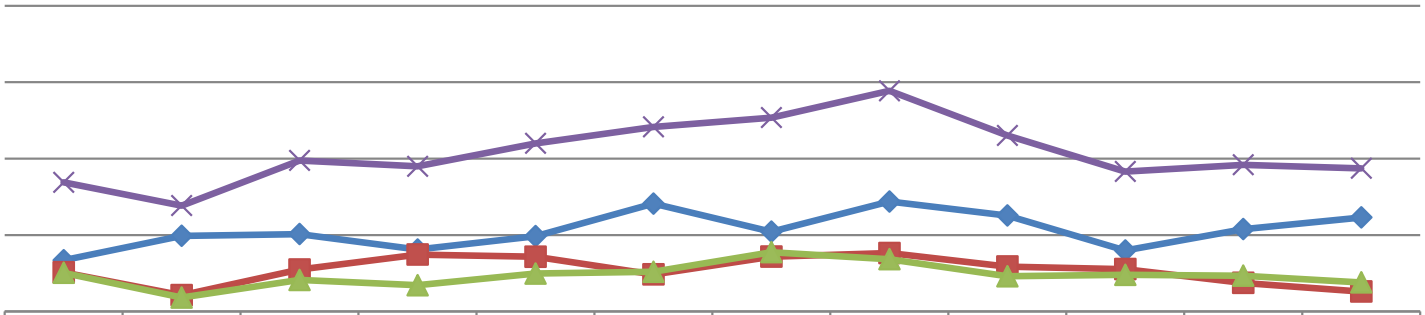
Total day visits	Total day visit spend
24,916,000	£1,211,924,000





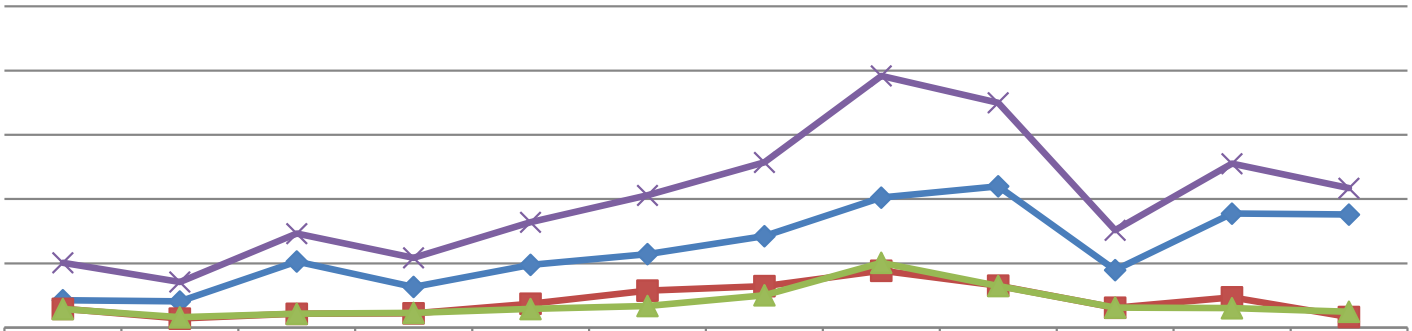
Devon - Estimated seasonality of day visits

Seasonality - day visits (000's)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban(000's)	670.7	989.7	1013.1	811.0	986.1	1411.6	1043.6	1438.3	1255.0	797.9	1077.2	1230.8
Rural (000's)	512.7	213.2	549.1	744.9	716.4	484.8	717.6	764.8	587.8	554.5	373.7	261.5
Coastal (000's)	506.5	182.1	413.1	343.3	496.6	519.7	775.8	684.3	460.6	479.6	468.0	380.4
Total (000's)	1689.9	1385.1	1975.4	1899.3	2199.1	2416.1	2537.0	2887.3	2303.4	1831.9	1918.9	1872.6

Seasonality - day visit spend (millions)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban (mn)	21.4	20.4	51.5	31.7	48.8	57.3	71.1	101.2	109.9	44.8	88.8	88.0
Rural (mn)	14.7	7.1	10.8	11.1	18.6	28.8	32.3	44.3	32.6	15.4	23.6	8.2
Coastal (mn)	14.4	8.1	10.8	11.5	14.5	16.9	25.2	50.5	32.4	15.6	15.2	12.3
Total (mn)	50.5	35.5	73.1	54.3	82.0	102.9	128.6	195.9	174.9	75.8	127.6	108.5

Devon – Direct visitor expenditure by category



Accommodation

- UK staying visitors £497,827,000
- Overseas staying visitors £64,493,000

Totals

£562,320,000 (21%)



Shopping

- UK staying visitors £158,426,000
- Overseas staying visitors £87,395,000
- Day visitors £372,613,000

£618,434,000 (24%)



Food & drink

- UK staying visitors £209,863,000
- Overseas staying visitors £59,137,000
- Day visitors £491,505,000

£760,505,000 (29%)



Attractions/entertainment

- UK staying visitors £103,301,000
- Overseas staying visitors £27,384,000
- Day visitors £140,642,000

£271,327,000 (10%)



Travel

- UK staying visitors £169,804,000
- Overseas staying visitors £27,001,000
- Day visitors £207,164,000

£403,969,000 (15%)

Devon – Other visitor related expenditure by category



Second Homes

£9,472,000



Boats

£10,259,000



Static vans

£1,813,000



Visiting friends and relatives (non-visitor spend)

£81,962,000

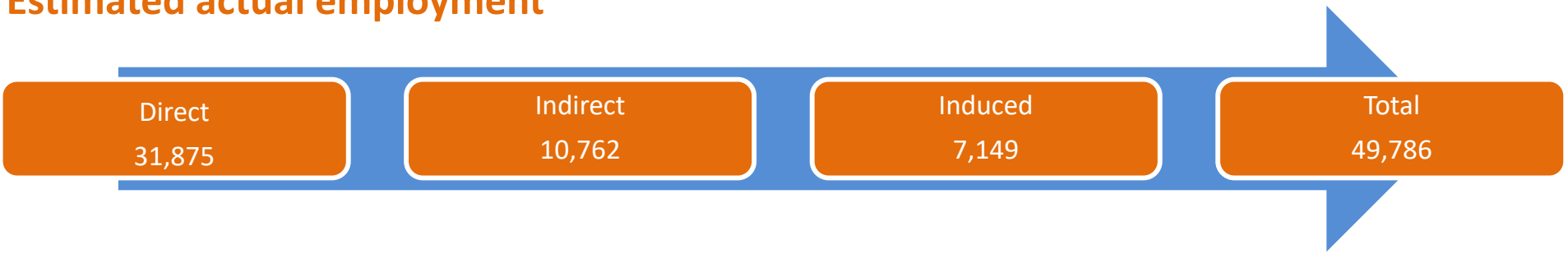
Devon – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£567,701,000	£9,830,000	£577,531,000
Retailing	£243,362,000	£368,887,000	£612,249,000
Catering	£260,930,000	£476,760,000	£737,690,000
Attractions/entertainment	£135,834,000	£149,283,000	£285,117,000
Transport	£118,083,000	£124,299,000	£242,382,000
Arising from non trip spend	£103,505,578	£0	£103,505,578
Total Direct	£1,429,415,578	£1,129,059,000	£2,558,474,578

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£1,429,415,578	£1,129,059,000	£2,558,474,578
Supplier and income induced	£774,157,000	£462,249,000	£1,236,406,000
Total	£2,203,572,578	£1,591,308,000	£3,794,880,578

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	6,037	105	6,141
Retailing	1,378	2,089	3,467
Catering	2,299	4,201	6,501
Attractions/entertainment	1,600	1,759	3,359
Transport	552	581	1,133
Arising from non trip spend	1,315	0	1,315
Total Direct	13,182	8,735	21,917