

The Economic Impact of the South Hams Visitor Economy 2023



Produced on behalf of South Hams District Council
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 the South Hams and Devon county and districts in 2023 (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 2023, including key facts about the economy, weather and key events please see Appendix 2 of this report.

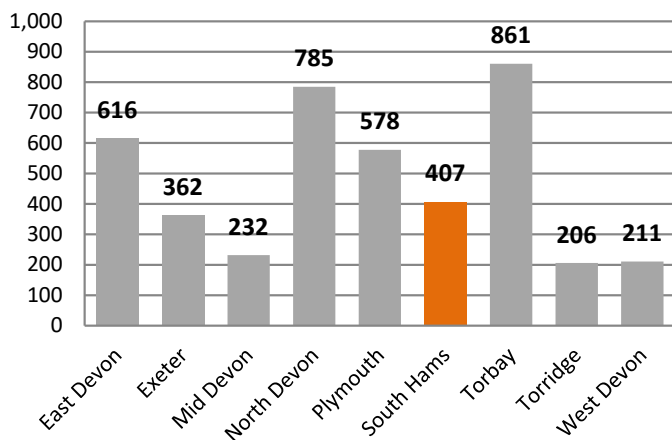
Value of Tourism 2023

South Hams

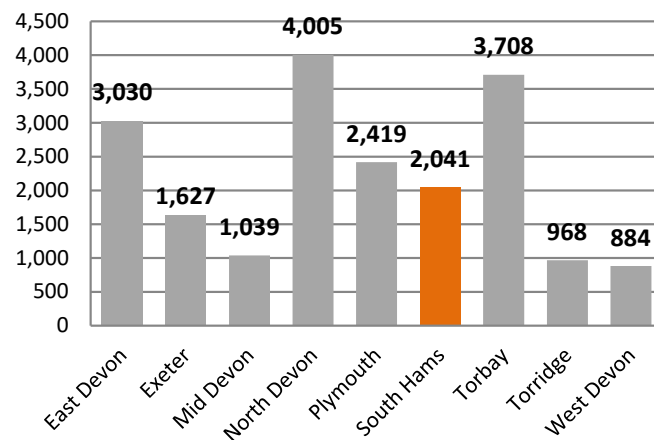
Key Facts	
407,000	Staying visitor trips
2,041,000	Staying visitor nights
£123,445,000	Staying visitor spend
3,079,000	Day visits
£132,512,000	Day visitor spend
£255,957,000	Direct visitor spend
£10,299,095	Other related spend
£266,256,095	TOTAL VISITOR RELATED SPEND
4,465	Estimated actual employment
3,231	FTE employment
10%	Proportion of all employment

South Hams - Staying visits in the county context

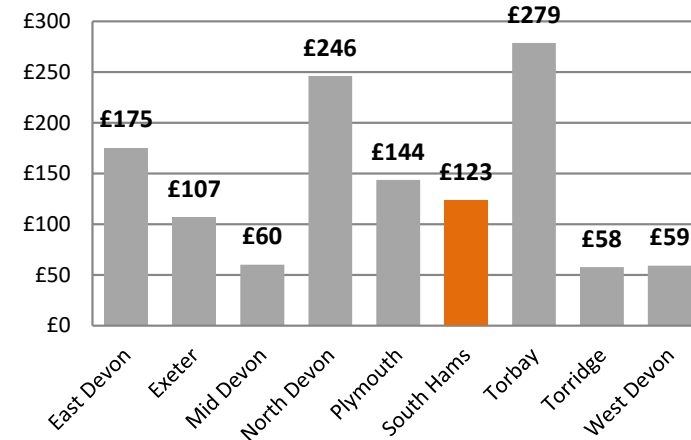
All staying trips (000's)



All staying nights (000's)



All staying spend (£mn)



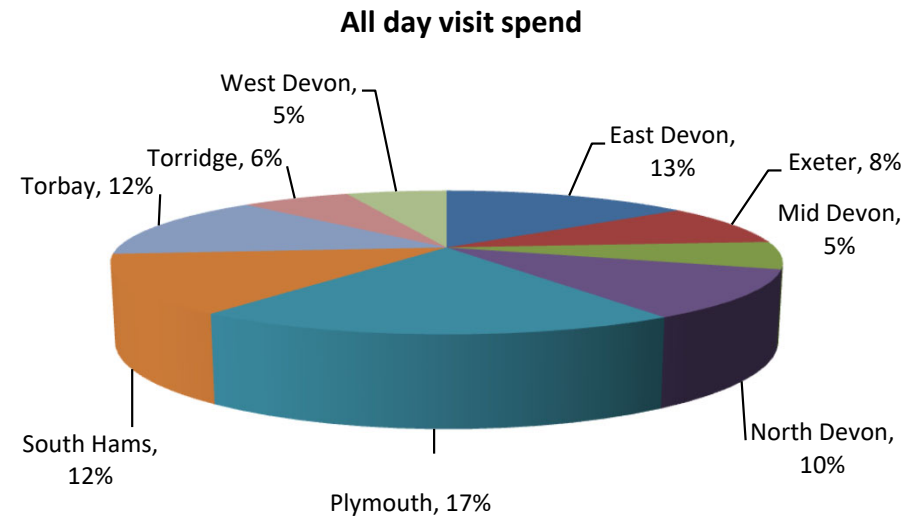
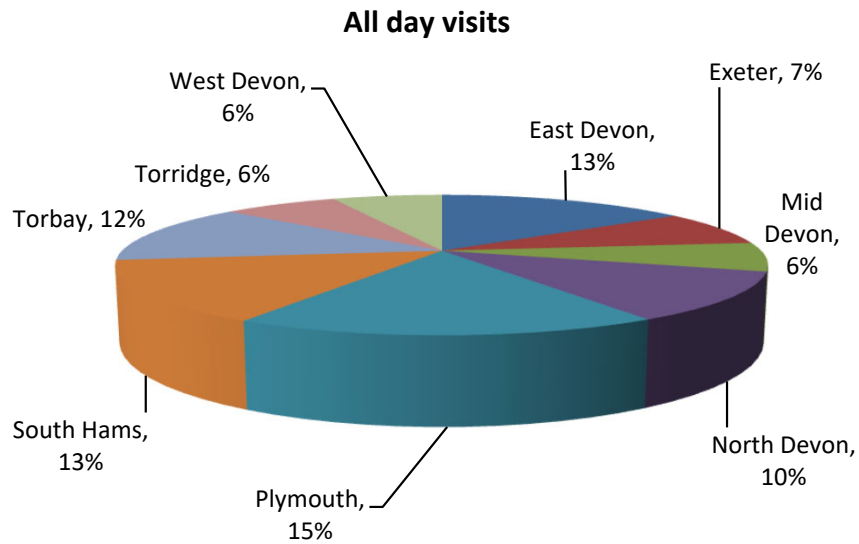
Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
East Devon	574	42	2,695	335	£154	£21
Exeter	316	46	1,057	570	£67	£40
Mid-Devon	212	20	897	142	£51	£9
North Devon	733	52	3,660	345	£220	£26
Plymouth	510	68	1,750	669	£100	£44
South Hams	374	33	1,781	260	£106	£18
Torbay	781	80	3,203	505	£236	£43
Torrige	188	18	832	136	£49	£9
West Devon	190	21	741	143	£49	£11

South Hams - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	58,000	183,000	£19,553,000
Self catering	94,000	589,000	£46,426,000
Touring caravans /tents	75,000	422,000	£18,134,000
Static vans/holiday centres	13,000	76,000	£4,288,000
Group/campus	2,000	6,000	£383,000
Paying guest in private homes	0	0	£0
Second homes	29,000	145,000	£4,481,000
Boat moorings	5,000	23,000	£1,205,000
Other	4,000	6,000	£314,000
Staying with friends and relatives	96,000	329,000	£11,078,000
Total	374,000	1,781,000	£105,863,000

Overseas tourists	Trips	Nights	Spend
Serviced	7,000	28,000	£3,836,000
Self catering	6,000	60,000	£4,898,000
Touring caravans /tents	4,000	20,000	£1,187,000
Static vans/holiday centres	0	1,000	£52,000
Group/campus	1,000	15,000	£1,118,000
Paying guest in private homes	0	8,000	£516,000
Second homes	1,000	19,000	£1,023,000
Boat moorings	0	0	£0
Other	1,000	3,000	£80,000
Staying with friends and relatives	12,000	106,000	£4,872,000
Total	33,000	260,000	£17,582,000

South Hams - Day visits in the county context

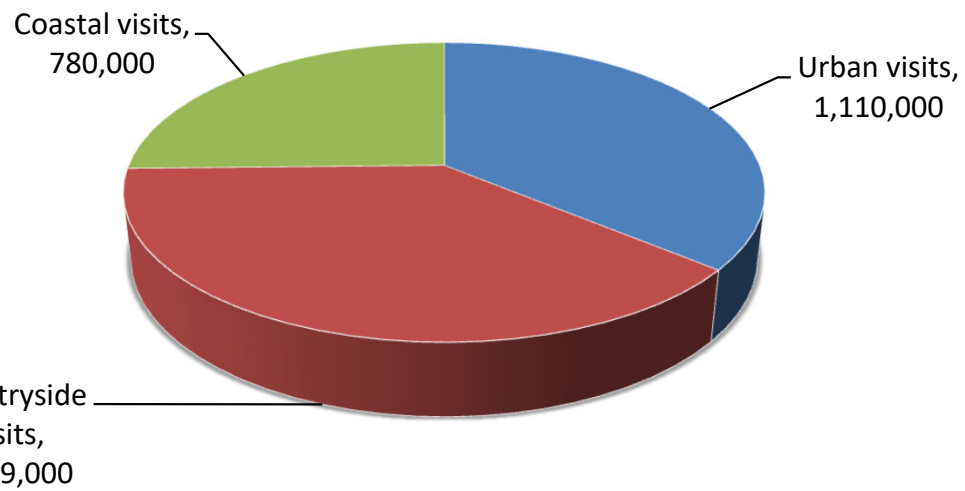


Area	Day visits (mn)	Day visit spend (£mn)
East Devon	3.3	£144.7
Exeter	1.7	£90.1
Mid-Devon	1.4	£61.0
North Devon	2.4	£108.7
Plymouth	3.8	£192.0
South Hams	3.1	£132.5
Torbay	2.9	£139.6
Torridge	1.5	£64.0
West Devon	1.4	£58.6

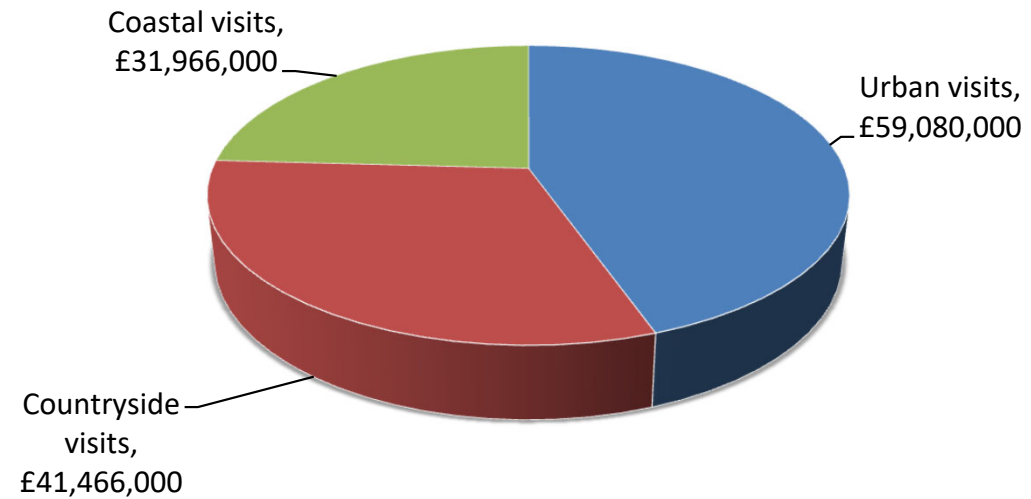
South Hams - Day visits by location

Total day visits	Total day visit spend
3,079,000	£132,512,000

Day visits



Day visit spend



South Hams - 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.

South Hams – Direct visitor expenditure by category



Accommodation

- UK staying visitors £38,513,000
- Overseas staying visitors £4,775,000

Totals

£43,288,000 (17%)



Shopping

- UK staying visitors £14,256,000
- Overseas staying visitors £5,427,000
- Day visitors £38,690,000

£58,373,000 (23%)



Food & drink

- UK staying visitors £22,415,000
- Overseas staying visitors £3,717,000
- Day visitors £54,925,000

£81,057,000 (32%)



Attractions/entertainment

- UK staying visitors £11,045,000
- Overseas staying visitors £1,781,000
- Day visitors £15,714,000

£28,540,000 (11%)



Travel

- UK staying visitors £19,633,000
- Overseas staying visitors £1,882,000
- Day visitors £23,181,000

£44,696,000 (17%)

South Hams – Other visitor related expenditure by category



Second Homes
£2,633,000



Boats
£1,952,000



Visiting friends and relatives (non-visitor spend)
£5,714,000

- 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.

South Hams – Tourism related employment

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

The use of visitor expenditure to generate job numbers underestimates the number of jobs arising in the attractions/entertainment sector. The underestimate arises because local authorities and voluntary bodies do not always seek to recoup the full operating costs of individual attractions or facilities from entrance charges. Therefore an additional percentage of direct employment is added to the attractions sector estimates to take account of this factor.

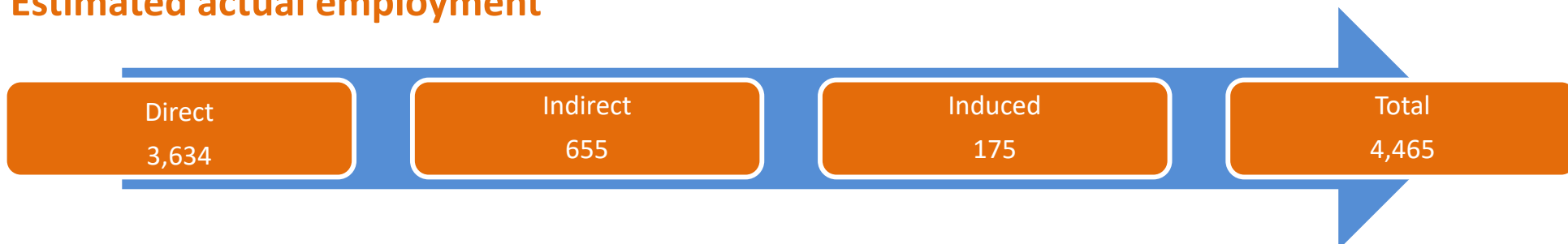
This section of the report looks at employment on three levels;

- **Direct Jobs** - Direct jobs are those in businesses in receipt of visitor spending. For example, jobs supported by visitor spending at a hotel would be direct jobs.
- **Indirect Jobs** - Indirect employment arises as a result of expenditure by businesses in direct receipt of visitor expenditure on the purchase of goods and services for their businesses. For example, some of the employment at a business supplying food and drink may be supported through the supplies that the business sells to hotels (or any other business in direct receipt of visitor expenditure).
- **Induced Jobs** - Induced jobs are those that are supported by the spending of wages by employees in direct and indirect jobs. Such spending will be spread across a wide range of service sectors.

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

South Hams – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)

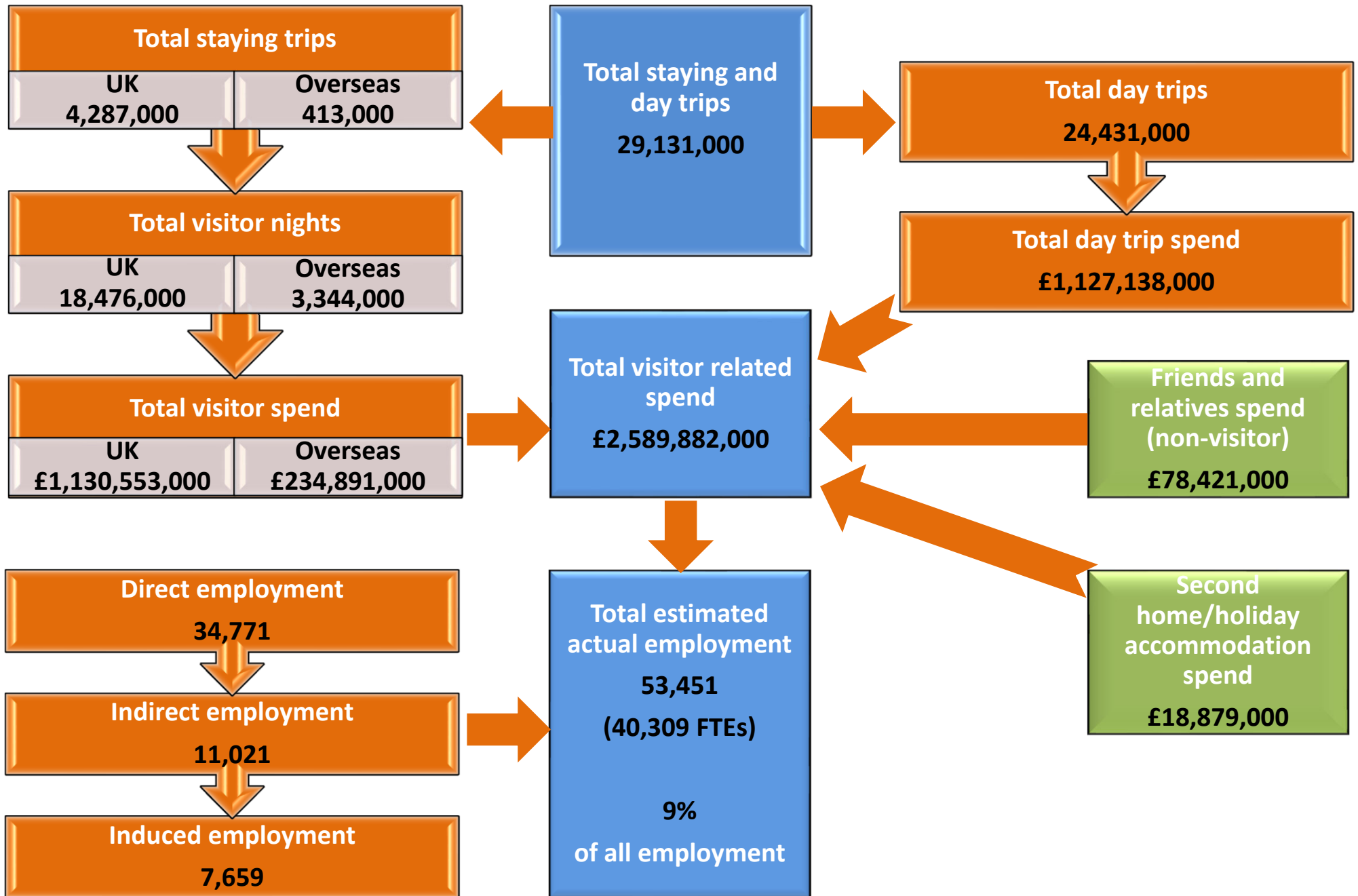


Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	491	12	503
Retailing	130	256	386
Catering	271	570	841
Attractions/entertainment	213	267	480
Transport	71	76	147
Arising from non trip spend	145	0	145
Total Direct	1,321	1,181	2,502

Devon 2023



Devon - Key facts at a glance



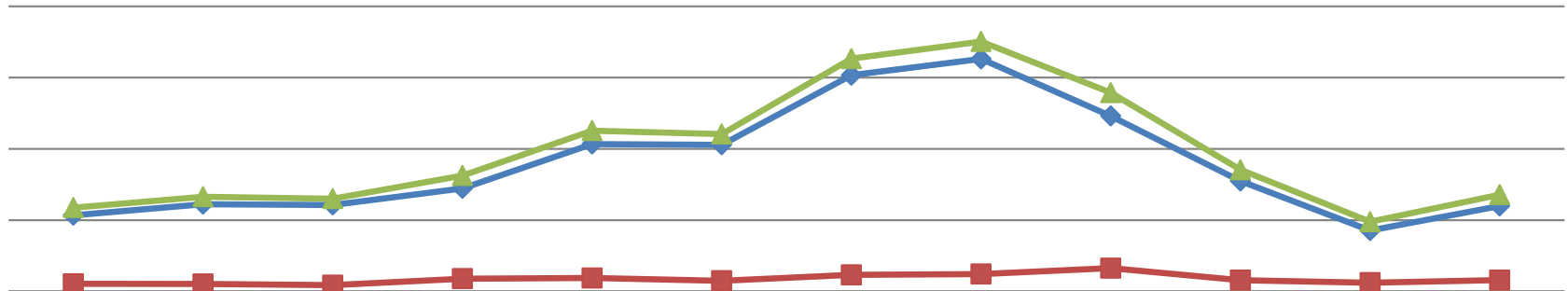
Devon - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	1,118,000	3,555,000	£379,290,000
Self catering	431,000	2,716,000	£213,965,000
Touring caravans /tents	447,000	2,533,000	£108,766,000
Static vans/holiday centres	721,000	4,225,000	£236,917,000
Group/campus	84,000	232,000	£13,781,000
Paying guest in private homes	0	0	£0
Second homes	100,000	500,000	£15,424,000
Boat moorings	24,000	114,000	£6,059,000
Other	50,000	88,000	£4,310,000
Staying with friends and relatives	1,312,000	4,512,000	£152,042,000
Total	4,287,000	18,476,000	£1,130,553,000

Overseas tourists	Trips	Nights	Spend
Serviced	143,000	543,000	£74,406,000
Self catering	27,000	279,000	£22,669,000
Touring caravans /tents	23,000	118,000	£7,131,000
Static vans/holiday centres	6,000	39,000	£3,016,000
Group/campus	19,000	550,000	£40,197,000
Paying guest in private homes	10,000	261,000	£15,990,000
Second homes	5,000	66,000	£3,520,000
Boat moorings	0	0	£0
Other	14,000	37,000	£1,096,000
Staying with friends and relatives	166,000	1,450,000	£66,867,000
Total	413,000	3,344,000	£234,891,000

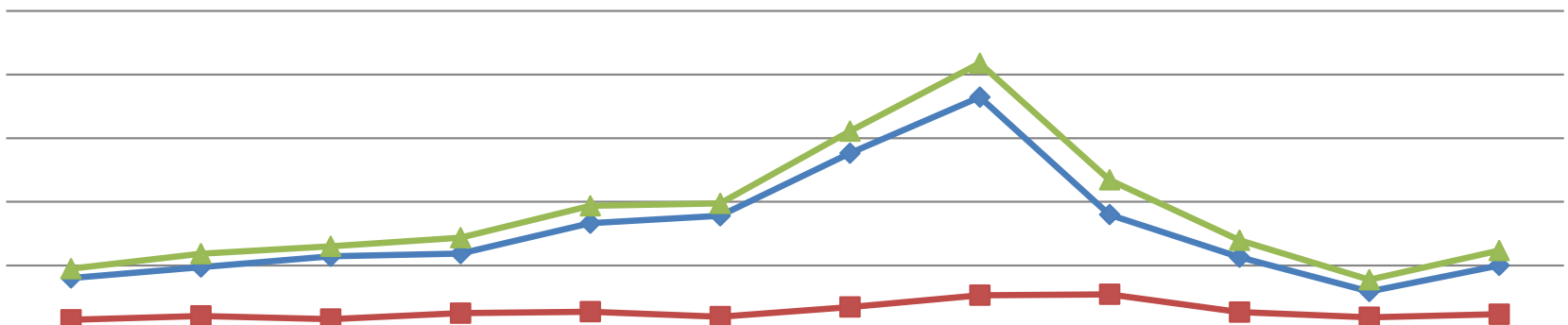
Devon - Estimated seasonality of staying visits

Seasonality - trips



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK trips (000's)	213.8	244.8	242.7	289.1	413.5	411.6	606.6	652.2	492.4	309.7	170.8	239.9
OS trips (000's)	21.5	20.9	17.7	36.0	37.8	30.0	46.6	48.9	65.4	31.7	24.7	31.9
Total trips (000's)	235.3	265.7	260.4	325.1	451.2	441.6	653.2	701.1	557.8	341.4	195.5	271.8

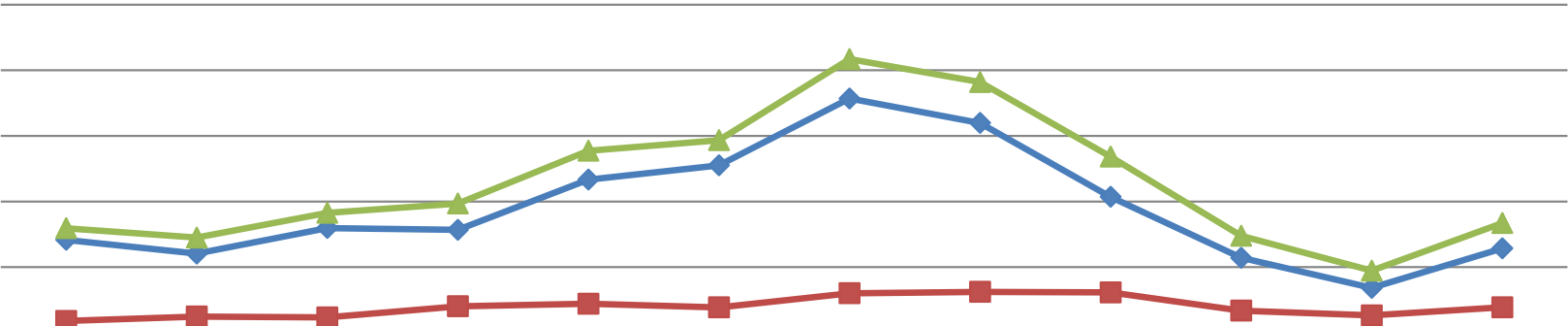
Seasonality - nights



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK nights (000's)	804.0	975.3	1142.7	1185.1	1664.4	1779.4	2763.3	3644.7	1797.7	1128.2	590.7	1000.4
OS nights (000's)	145.6	207.4	157.5	250.9	272.9	195.5	347.1	533.0	546.6	267.8	185.3	234.3
Total nights (000's)	949.6	1182.7	1300.3	1436.0	1937.3	1974.9	3110.5	4177.8	2344.3	1396.0	776.0	1234.6

Devon - Estimated seasonality of staying visits

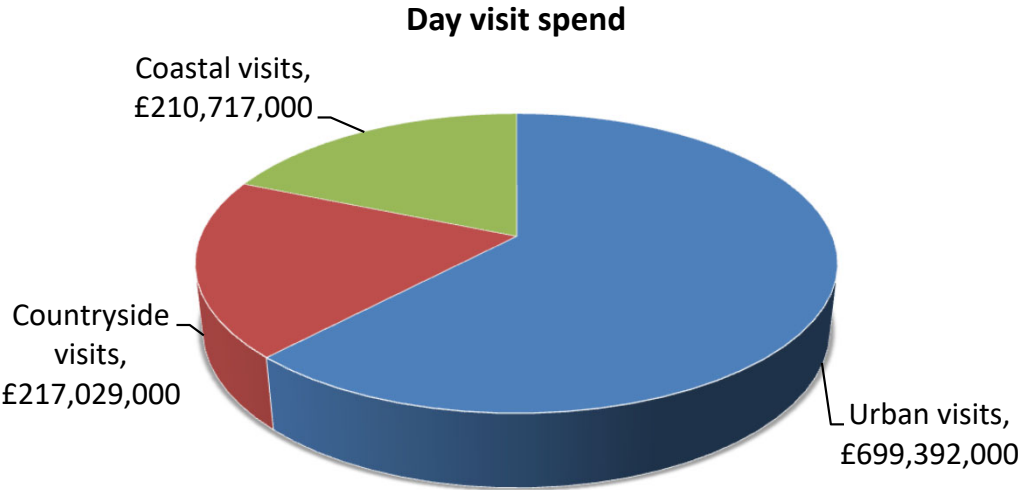
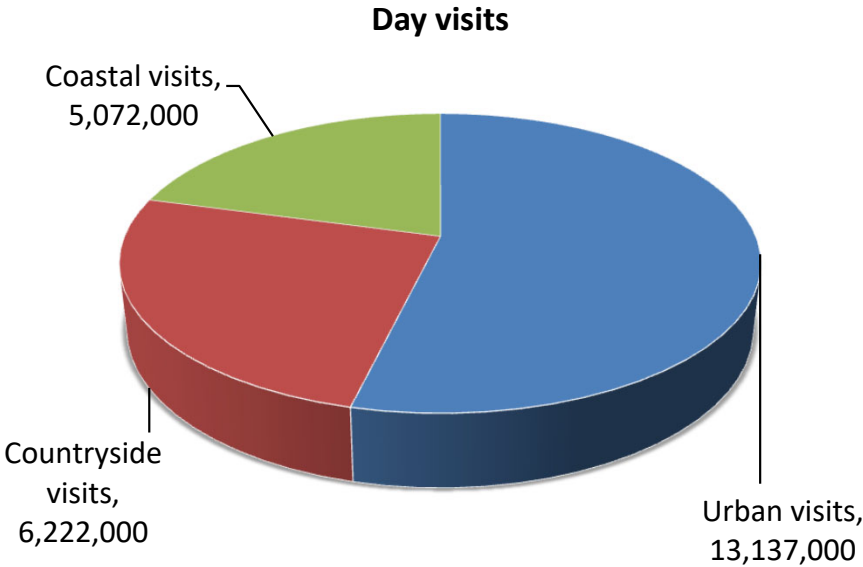
Seasonality - spend



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK spend (mn's)	70.7	60.2	79.8	78.4	116.6	127.5	178.5	159.9	103.5	57.1	34.1	64.2
OS spend (mn's)	8.9	12.2	11.6	20.0	22.0	19.2	30.0	31.1	30.7	16.7	13.1	19.3
Total spend (mn's)	79.6	72.4	91.4	98.4	138.7	146.7	208.5	191.0	134.2	73.8	47.2	83.5

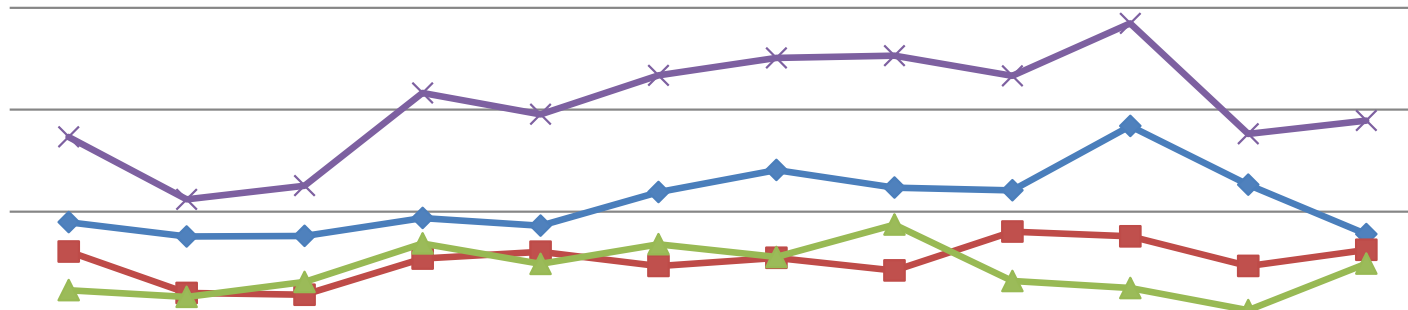
Devon - Day visits by location

Total day visits	Total day visit spend
24,431,000	£1,127,138,000



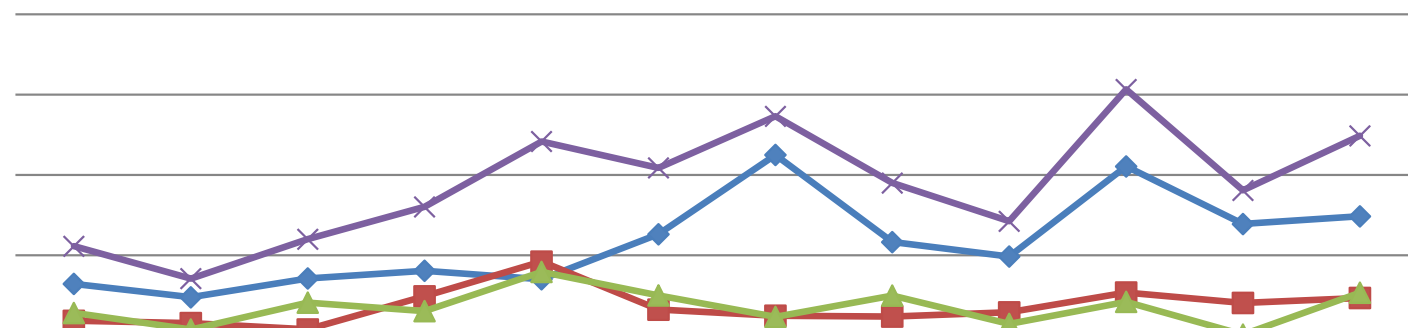
Devon - Estimated seasonality of day visits

Seasonality - day visits (000's)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban(000's)	896.2	755.8	760.9	936.5	862.1	1191.0	1407.6	1235.1	1208.4	1839.8	1264.0	779.4
Rural (000's)	607.8	201.1	184.3	538.8	605.5	465.7	545.9	421.8	803.1	757.2	465.9	624.9
Coastal (000's)	228.4	162.8	309.3	687.7	487.3	679.1	554.3	872.4	319.1	249.8	32.3	489.5
Total (000's)	1732.4	1119.7	1254.5	2163.1	1954.9	2335.8	2507.8	2529.4	2330.7	2846.7	1762.2	1893.9

Seasonality - day visit spend (millions)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban (mn)	32.2	23.9	35.6	40.4	35.1	63.1	112.5	58.2	49.3	105.4	69.5	74.3
Rural (mn)	9.2	7.8	3.9	24.5	46.1	16.2	12.4	11.9	14.5	26.8	20.4	23.4
Coastal (mn)	14.1	3.8	20.6	15.2	39.7	25.0	11.6	24.9	7.3	21.1	0.6	26.7
Total (mn)	55.6	35.5	60.0	80.1	120.9	104.4	136.5	95.0	71.1	153.3	90.4	124.4

Devon – Direct visitor expenditure by category



Accommodation

- UK staying visitors £411,295,000
- Overseas staying visitors £63,797,000

Totals

£475,092,000 (19%)



Shopping

- UK staying visitors £152,251,000
- Overseas staying visitors £72,497,000
- Day visitors £384,158,000

£608,906,000 (24%)



Food & drink

- UK staying visitors £239,383,000
- Overseas staying visitors £49,664,000
- Day visitors £446,467,000

£735,514,000 (30%)



Attractions/entertainment

- UK staying visitors £117,952,000
- Overseas staying visitors £23,789,000
- Day visitors £122,291,000

£264,032,000 (11%)



Travel

- UK staying visitors £209,672,000
- Overseas staying visitors £25,144,000
- Day visitors £174,223,000

£409,039,000 (16%)

Devon – Other visitor related expenditure by category



Second Homes

£9,063,000



Boats

£9,816,000



Visiting friends and relatives (non-visitor spend)

£78,421,000

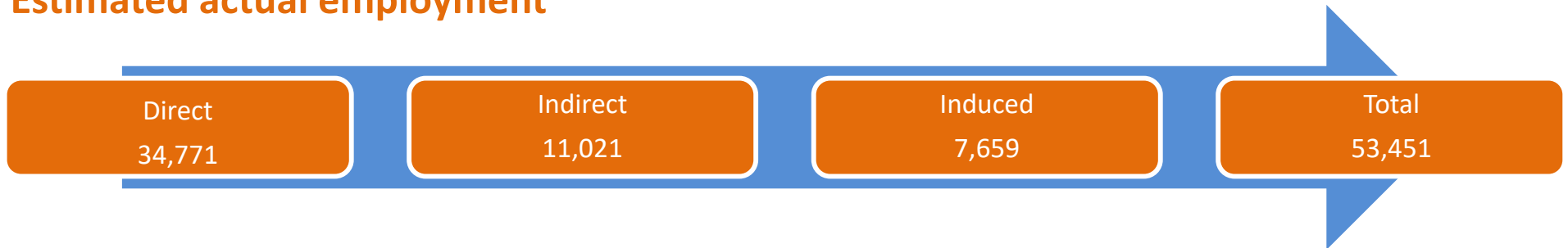
Devon – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£480,873,000	£8,929,000	£489,802,000
Retailing	£222,500,000	£380,316,000	£602,816,000
Catering	£280,376,000	£433,073,000	£713,449,000
Attractions/entertainment	£146,879,000	£130,597,000	£277,476,000
Transport	£140,890,000	£104,534,000	£245,424,000
Arising from non trip spend	£97,299,749	£0	£97,299,749
Total Direct	£1,368,817,749	£1,057,449,000	£2,426,266,749

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£1,368,817,749	£1,057,449,000	£2,426,266,749
Supplier and income induced	£723,092,000	£439,851,000	£1,162,943,000
Total	£2,091,909,749	£1,497,300,000	£3,589,209,749

Devon – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)



Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	5,299	98	5,397
Retailing	1,460	2,495	3,954
Catering	2,950	4,557	7,506
Attractions/entertainment	2,316	2,060	4,376
Transport	757	562	1,319
Arising from non trip spend	1,371	0	1,371
Total Direct	14,153	9,771	23,923