

The Economic Impact of the South West's Visitor Economy 2021

Regional comparisons 2021

Produced 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 West region in 2021, a year during which tourism was again severely affected by the Coronavirus pandemic (Covid-19). Please note that this report should be read in conjunction with local economic impact reports and appendices for 2021 provided and only contains data for those areas participating in the 2021 project.

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.



Methodology note

This year's outputs are for the Covid hit year of 2021 and as a result our approach to the project again needed to change. There has been very limited national survey data available for the subject year due to the pandemic and certainly nothing at a regional level or below, so as a result 2019 outputs were used as the foundation from which 2021 outputs were estimated.

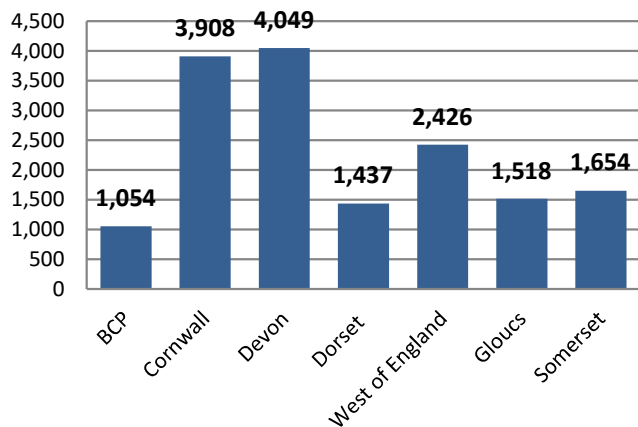
Covid impact data was gathered by TSWRC from February 2020 onwards which was used alongside other local survey data and national level outputs and forecasts and applied to the 2019 outputs for each area to model the 2021 input data. Once the input data was calculated the Cambridge Model was then used to produce the outputs for 2021 and as such, they are comparable with previous years whilst noting the changes above.

Employment figures show a decrease compared to the 2019 data. However, many more tourism jobs will have been supported by Government support schemes in place in 2021 due to the pandemic e.g. furlough scheme. So the 2021 figure is an estimate of jobs supported by the 2021 visitor spend rather than an actual change in the employment numbers when compared to previous years.

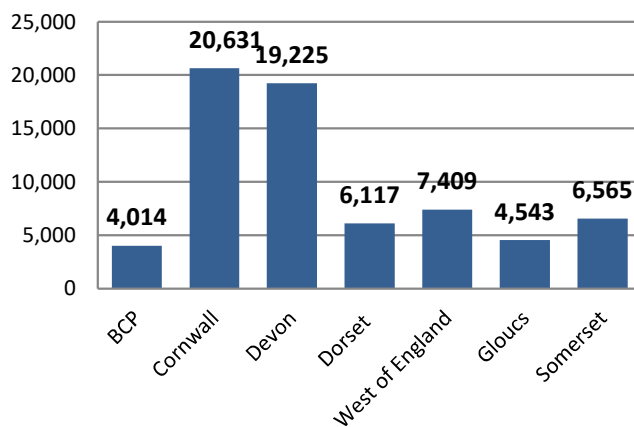


Staying visits by area

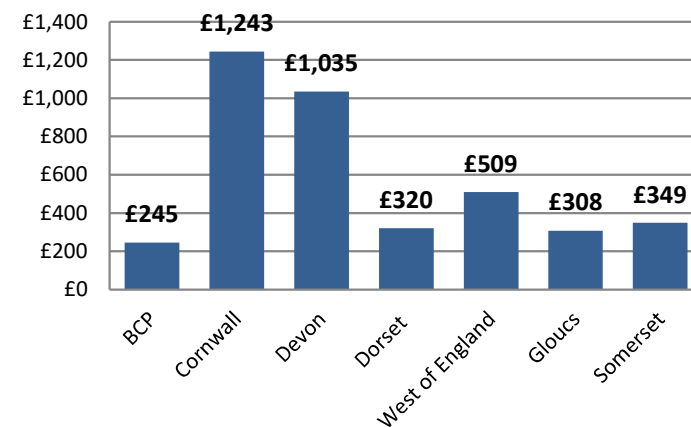
All staying trips (000's)



All staying nights (000's)

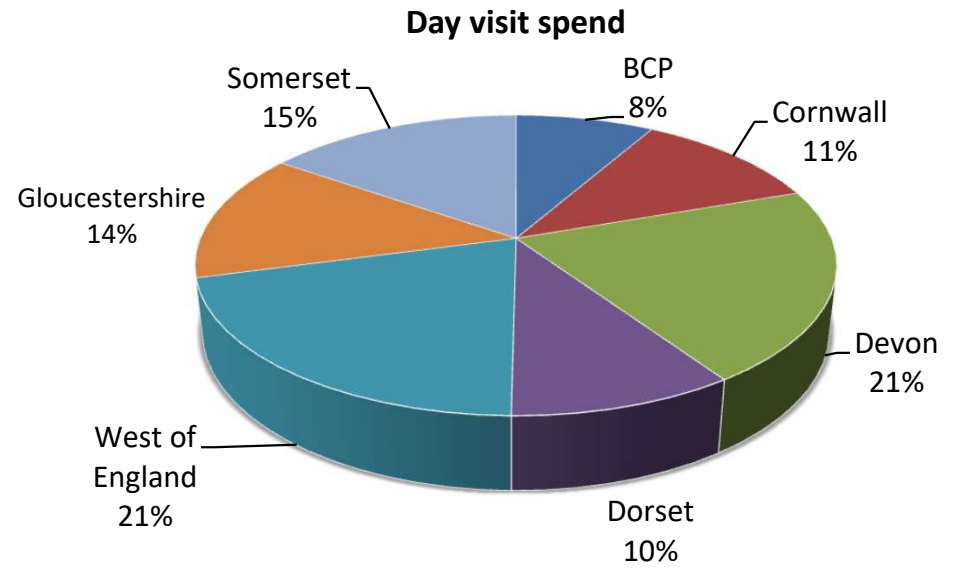
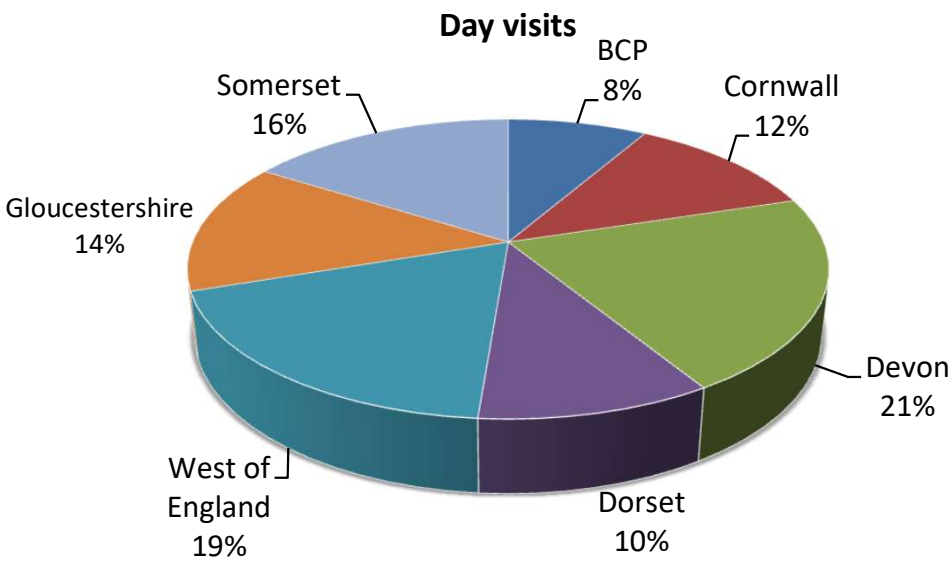


All staying spend (millions)



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
BCP	1,015	39	3,363	651	£220	£25
Cornwall	3,850	58	19,823	808	£1,212	£31
Devon	3,967	82	18,113	1,112	£997	£38
Dorset	1,414	23	5,733	384	£306	£15
West of England	2,261	165	5,570	1,839	£426	£83
Gloucestershire	1,470	48	3,930	613	£281	£26
Somerset	1,610	44	5,994	571	£329	£20

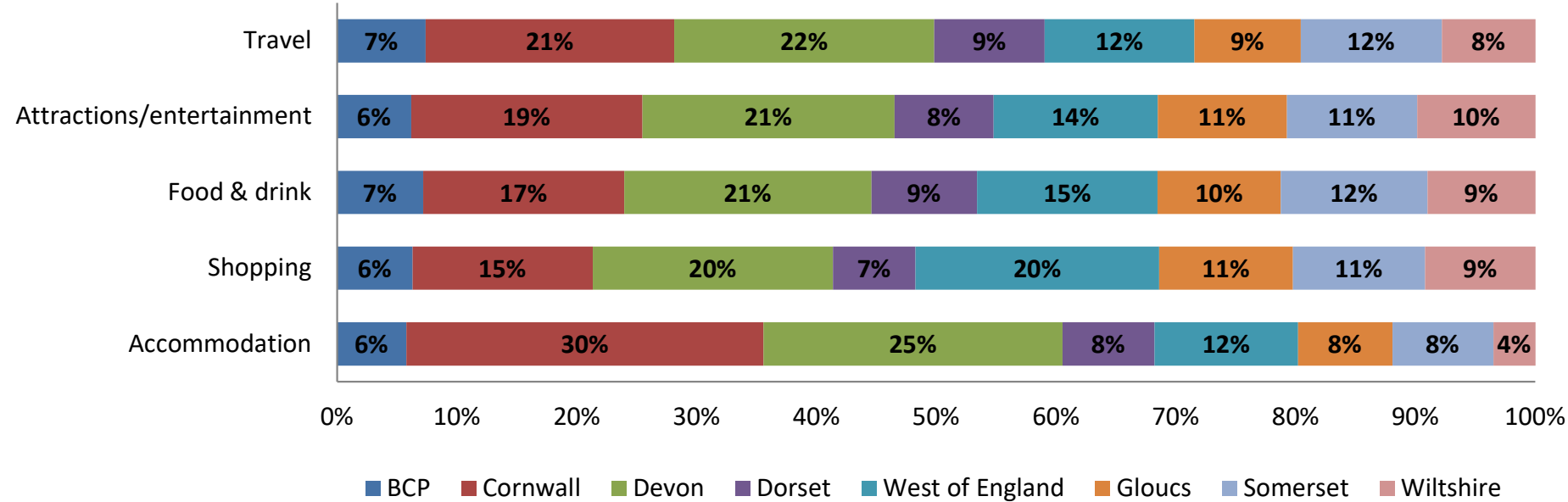
Day visits by area



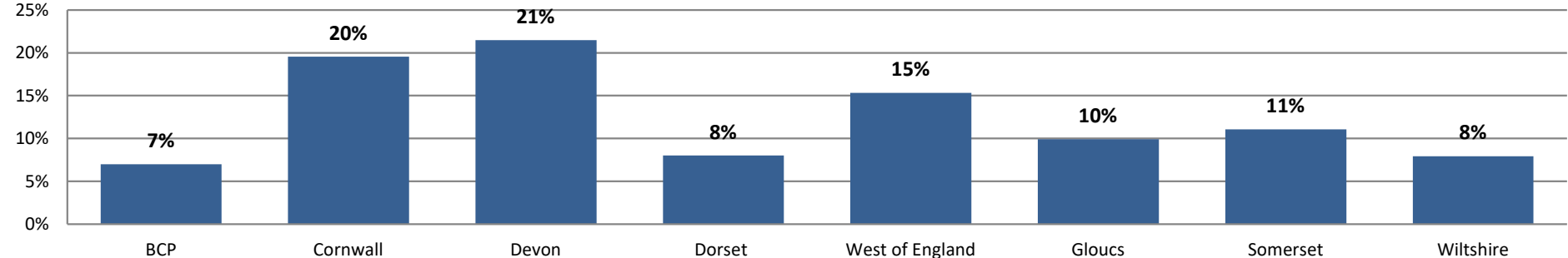
Area	Day visits (millions)	Day visit spend (millions)
BCP	8.8	£328.8
Cornwall	12.4	£451.4
Devon	22.2	£828.2
Dorset	10.6	£384.6
West of England	19.6	£818.6
Gloucestershire	14.9	£550.2
Somerset	16.9	£608.3

Direct visitor expenditure by category and area

South West	Accommodation	Shopping	Food & drink	Attractions/entertainment	Travel	TOTAL
Spend	£1,645,579,000	£2,109,433,000	£3,080,220,000	£734,151,000	£1,097,939,000	£8,667,324,000
%	19%	24%	36%	8%	13%	100%

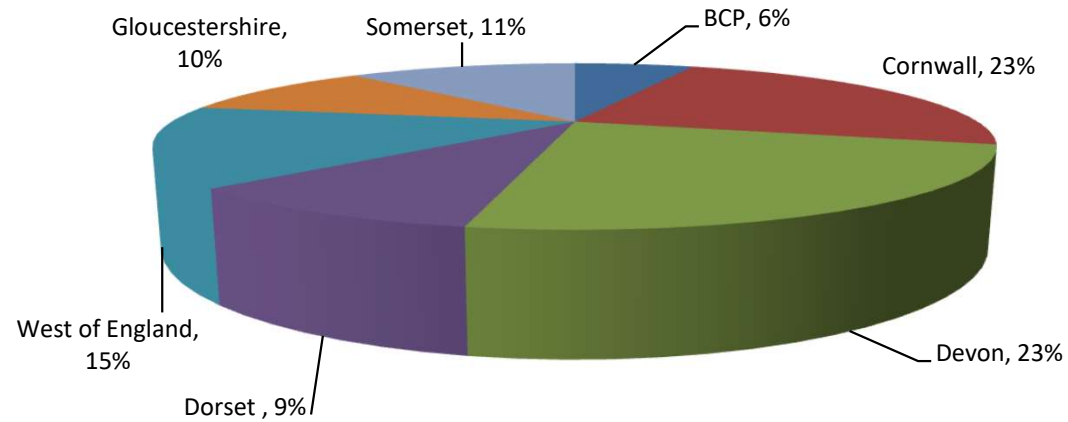


% of all regional spend



Tourism related employment by area

Distribution of tourism related employment (FTE's)



Area	Number of FTE's
BCP	8,910
Cornwall	34,089
Devon	34,541
Dorset	13,953
West of England	22,616
Gloucestershire	14,889
Somerset	17,044

Estimated Covid impacts by area

% Change by area compared to 2019	Staying visitor trips	Staying visitor nights	Staying visitor spend	Day visits	Day visit spend	Total visitor spend
BCP	-36%	-38%	-41%	-23%	-18%	-30%
Cornwall	-20%	-15%	-18%	-14%	-10%	-16%
Devon	-29%	-19%	-25%	-25%	-20%	-23%
Dorset	-28%	-25%	-30%	-29%	-23%	-26%
West of England	-42%	-42%	-43%	-23%	-20%	-31%
Gloucestershire	-33%	-31%	-36%	-23%	-19%	-26%
Somerset	-33%	-30%	-32%	-23%	-18%	-23%
South West	-31%	-26%	-31%	-23%	-19%	-25%