

Torbay Accommodation Audit 2019

Prepared for TDA

By

The South West Research Company Ltd.

Final Report

July 2019



Torbay Accommodation Audit 2019

Background & rationale

This report provides an overview of current tourism accommodation stock in the resort undertaken during by The South West Research Company on behalf of the TDA during June 2019.

This is the third accommodation audit commissioned by the TDA, the others having been completed in 2012 and 2014.

The data has been compiled as follows;

- Confirmation of existing records held on the 2014 audit database, amending updating and deleting where required using internet and directory searches.
- Conduct further searches using the internet and directories to try and identify new accommodation records.
- Sense check of the database on-street to check entries held and seek new accommodation which resulted in approximately 20% of all records being checked.

Torbay Accommodation Audit 2019

Accommodation Audit methodology

In 2010/11 South West Tourism, the former regional tourist board for the South West, undertook a comprehensive Regional Accommodation Audit over an 18 month period to provide an up to date estimate of accommodation stocks across the South West region. Prior to this levels of available information varied across the region with many areas only maintaining the accommodation information of quality assured businesses or businesses that were registered for membership schemes. The Regional Accommodation Audit used internet searches, directories, brochures and Google Street to build the database, working closely with local areas to build the full picture for each county across the region.

It is highly unlikely that any audit of this type could ever claim to be 100% accurate but the regional audit should be seen as the most robust piece of work available to inform us of accommodation stocks in a local area and provide a suitable baseline to work from. As a result, data for Torbay was extracted from the Regional Accommodation Audit and used as a starting point in compiling an accommodation audit for Torbay in 2012 and which was subsequently updated in 2014. Furthermore, TDA commissioned The South West Research Company to run a further update on stock levels in the resort during mid-2019 to identify and highlight any changes in the stock levels in Torbay in the five year period since the 2014 audit was undertaken.

The key steps in the methodology used for the Torbay Audit in 2019 were the same as those used during the 2012 and 2014 audits and are shown below;

- Confirmation of existing records held on the 2014 audit database, amending updating and deleting where required using internet and directory searches.
- Conduct further searches using the internet and directories to try and identify new accommodation records.
- Sense check of the database on-street to check entries held and seek new accommodation which resulted in approximately 20% of all records being checked.

The following pages look at the details of accommodation stocks in Torbay gathered through this approach and, where possible, make comparison to previous estimates for Torbay in the 2012 and 2014 audits and the Turning the Tide Strategy estimates of 2007. The Torbay Accommodation Audit 2019 should be seen as a best estimate of accommodation in Torbay but undoubtedly will not be 100% accurate and should be again viewed as a document which needs to be reviewed on a regular and frequent basis (ideally annually) in order to retain its' value. Whilst comparative figures have also been provided in this section with the 2007 strategy estimates we are unable to pass judgement on the accuracy of previous data sources used prior to the 2012 audit.

Torbay Accommodation Audit 2019

Changes in capacity

When considering any changes in bedspace capacity the limitations of work of this type should be considered and as a result changes might not always represent actual change. Some examples of reasons for changes are shown below;

- Actual new accommodation opened.
- The re-opening of a business that was closed for refurbishment during 2014.
- Discovery of existing stock from 2014 not picked up during the 2014 audit.

In terms of the last bullet above there are a number of reasons whilst this could occur and as already highlighted no audit of this type should be viewed as 100% accurate. Some possible explanations for this are shown below;

- Increased web presence of business.
- Increased number of self catering agency properties which are easier to collate as they are listed together.
- New areas covered during on-street checks.

As recommended previously, to reduce the risk of these factors influencing the findings in future years, if possible, the TDA should consider increasing the budget allocated to this project to allow for a more thorough physical checking of stocks to take place that ensures all areas are sufficiently covered and in excess of 80% of actual stock is viewed.

Torbay Accommodation Audit 2019

Accommodation Audit – Bedspace capacity estimates and change by accommodation type

Turning The Tide Estimates 2007	Serviced	% of all	Self Catering	% of all	Holiday Parks	% of all	Touring Pitches	% of all	Totals	% of all
Torquay	13,080	71%	3,630	50%	1,790	15%	0	0%	18,500	43%
Paignton	4,820	26%	3,070	43%	5,800	47%	4,380	85%	18,070	42%
Brixham	560	3%	520	7%	4,710	38%	780	15%	6,570	15%
Totals	18,460	100%	7,220	100%	12,300	100%	5,160	100%	43,140	100%
2012 Estimates	Serviced	% of all	Self Catering	% of all	Holiday Parks	% of all	Touring Pitches	% of all	Totals	% of all
Torquay	8,974	68%	1,862	43%	986	15%	0	0%	11,822	42%
Babbacombe	1,254	9%	166	4%	0	0%	0	0%	1,420	5%
Paignton	2,608	20%	1,332	31%	3,489	54%	4,022	100%	11,451	41%
Brixham	448	3%	940	22%	1,988	31%	0	0%	3,376	12%
Totals	13,284	100%	4,300	100%	6,463	100%	4,022	100%	28,069	100%
% Change	-28%		-40%		-47%		-22%		-35%	
2014 Estimates	Serviced	% of all	Self Catering	% of all	Holiday Parks	% of all	Touring Pitches	% of all	Totals	% of all
Torquay	9,257	66%	1,938	43%	986	15%	0	0%	12,181	40%
Babbacombe	1,429	10%	161	4%	0	0%	0	0%	1,590	5%
Paignton	2,903	21%	1,396	31%	3,531	54%	4,664	91%	12,494	41%
Brixham	502	4%	1,003	22%	1,988	31%	480	9%	3,973	13%
Totals	14,091	100%	4,498	100%	6,505	100%	5,144	100%	30,238	100%
% Change	6%		5%		1%		28%		8%	
2019 Estimates	Serviced	% of all	Self Catering	% of all	Holiday Parks	% of all	Touring Pitches	% of all	Totals	% of all
Torquay	9,110	58%	2,110	42%	986	16%	0	0%	12,206	39%
Babbacombe	1,926	12%	288	6%	0	0%	0	0%	2,214	7%
Paignton	3,983	25%	1,476	30%	3,215	52%	3,684	88%	12,358	40%
Brixham	677	4%	1,126	23%	1,988	32%	480	12%	4,271	14%
Totals	15,696	100%	5,000	100%	6,189	100%	4,164	100%	31,049	100%
% Change	11%		11%		-5%		-19%		3%	

Torbay Accommodation Audit 2019

Accommodation Audit – Bedspace capacity estimates and change by accommodation type

The data suggests that accommodation bedspaces have increased by 3% over the five year period of 2014 to 2019. When analysed by accommodation type self catering and serviced bedspaces have seen the largest growth (+11% each). In contrast to self catering and serviced accommodation, holiday parks have seen a slight decrease of -5% in bedspaces since 2014 whilst touring pitches have decreased by -19% and both largely due to the closure of a large touring site in Paignton.

Looking at 2019 figures overall Torquay (39%) and Paignton (40%) account for 79% of all bedspaces in Torbay although the accommodation make up of each area is very different. Torquay capacity is largely made up of serviced accommodation bedspaces whilst Paignton offers a more diverse product with Holiday Park and Touring bedspaces accounting for the majority of its capacity.

Torbay Accommodation Audit 2019

Accommodation Audit – Bedspace capacity estimates and change by location

2012 Estimates	Serviced	% of all	Self Catering	% of all	Holiday Parks	% of all	Touring Pitches	% of all	Totals	% of all
Torquay	8,974	68%	1,862	43%	986	15%	0	0%	11,822	42%
Babbacombe	1,254	9%	166	4%	0	0%	0	0%	1,420	5%
Torquay and Babbacombe Combined	10,228	77%	2,028	47%	986	15%	0	0%	13,242	47%
% Change	-22%		-44%		-45%		0%		-28%	4%
Paignton	2,608	20%	1,332	31%	3,489	54%	4,022	100%	11,451	41%
% Change	-46%		-57%		-40%		-8%		-37%	-1%
Brixham	448	3%	940	22%	1,988	31%	0	0%	3,376	12%
% Change	-20%		81%		-58%		-100%		-49%	-3%
Totals	13,284	100%	4,300	100%	6,463	100%	4,022	100%	28,069	100%

2014 Estimates	Serviced	% of all	Self Catering	% of all	Holiday Parks	% of all	Touring Pitches	% of all	Totals	% of all
Torquay	9,257	66%	1,938	43%	986	15%	0	0%	12,181	40%
Babbacombe	1,429	10%	161	4%	0	0%	0	0%	1,590	5%
Torquay and Babbacombe Combined	10,686	76%	2,099	47%	986	15%	0	0%	13,771	46%
% Change	4%		4%		0%		0%		4%	-1%
Paignton	2,903	21%	1,396	31%	3,531	54%	4,664	91%	12,494	41%
% Change	11%		5%		1%		16%		9%	0%
Brixham	502	4%	1,003	22%	1,988	31%	480	9%	3,973	13%
% Change	12%		7%		0%		100%		18%	+1%
Totals	14,091	100%	4,498	100%	6,505	100%	5,144	100%	30,238	100%

Torbay Accommodation Audit 2019

Accommodation Audit – Bedspace capacity estimates and change by location

2019 Estimates	Serviced	% of all	Self Catering	% of all	Holiday Parks	% of all	Touring Pitches	% of all	Totals	% of all
Torquay	9,110	58%	2,110	42%	986	16%	0	0%	12,206	39%
Babbacombe	1,926	12%	288	6%	0	0%	0	0%	2,214	7%
Torquay and Babbacombe Combined	11,036	70%	2,398	48%	986	16%	0	0%	14,420	45%
% Change	3%		14%		0%		0%		5%	-2%
Paignton	3,983	26%	1,476	30%	3,215	52%	3,684	88%	12,358	40%
% Change	37%		6%		-9%		-21%		-1%	-3%
Brixham	677	4%	1,126	23%	1,988	32%	480	12%	4,271	14%
% Change	35%		12%		0%		0%		8%	6%
Totals	15,696	100%	5,000	100%	6,189	100%	4,164	100%	31,049	100%

Torbay Accommodation Audit 2019

Accommodation Audit – Capacity estimates and change by location

Looking at 2019 figures overall there is little change in the proportion of bedspaces allocated to each area compared to 2014.

When the changes between 2014 and 2019 are analysed by area and accommodation type;

Serviced accommodation – Paignton bedspaces have increased by 37% and Brixham by 35%. Torquay and Babbacombe bedspaces have increased by 3%.

Self Catering – Torquay and Babbacombe combined have increased by 14%, Brixham by 12% and Paignton by 6%.

Holiday Parks – Paignton bedspaces have decreased by -9% with no change in other areas.

Touring Pitches – Paignton bedspaces have decreased by -21% with no change in other areas.

Torbay Accommodation Audit 2019

Accommodation Audit – Bedspace capacity by business type and location 2019

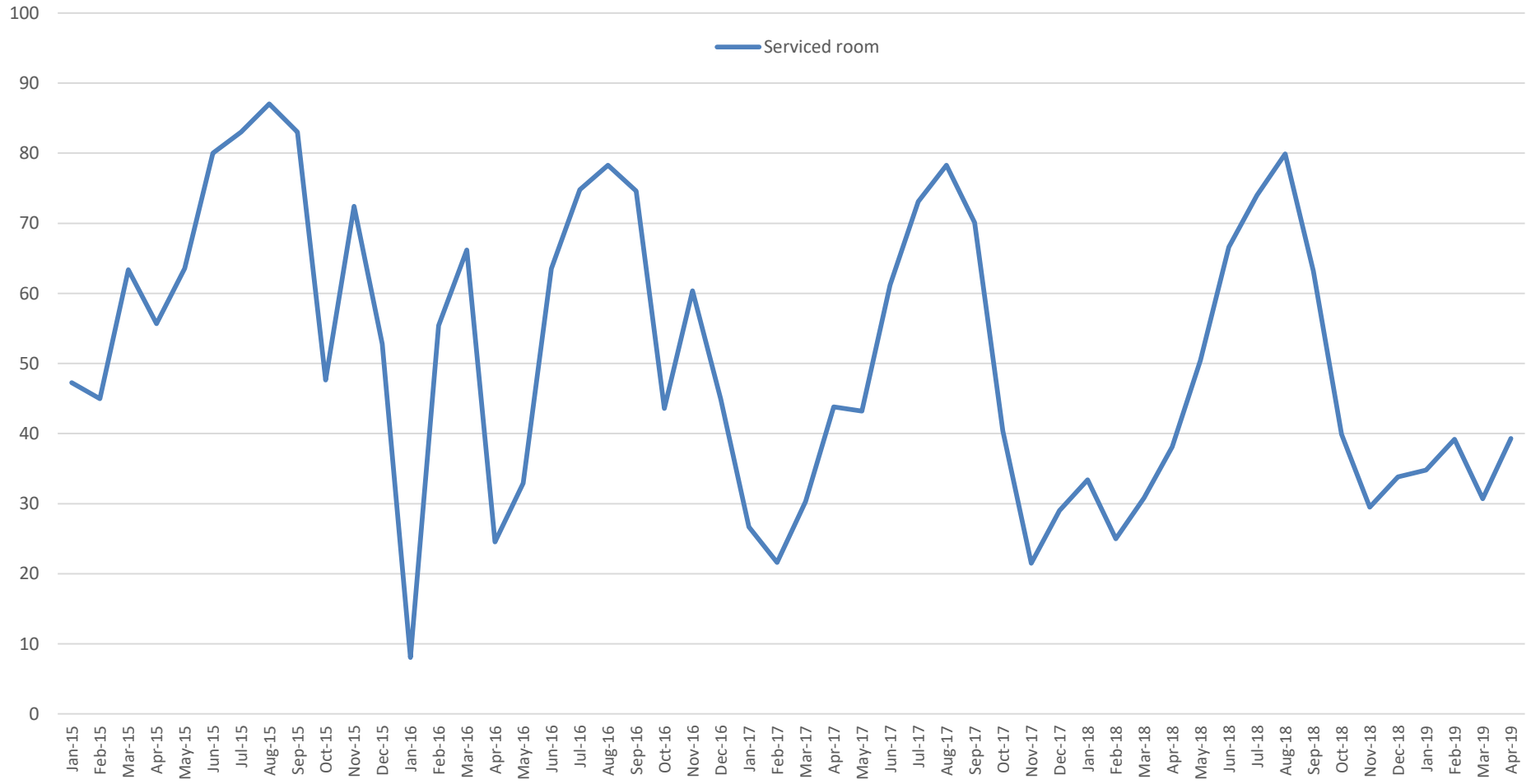
Accommodation type	Babbacombe	Brixham	Paignton	Torquay	Grand Total
Bed & Breakfast					
Count of businesses	8	3	20	15	46
Sum of Bedrooms or units	49	18	123	114	304
Sum of Bedspaces	97	37	275	235	644
Camping and Caravanning					
Count of businesses		2	5		7
Sum of Bedrooms or units		122	1,103		1,225
Sum of Bedspaces		480	3,684		4,164
Sum of Total touring pitches		390	701		1,091
Sum of Total static units		2	398		400
Sum of Total static lodges			4		4
Guest House					
Count of businesses	15	22	76	114	227
Sum of Bedrooms or units	117	148	636	1,019	1,920
Sum of Bedspaces	244	318	1,362	2,234	4,158
Holiday Park					
Count of businesses		4	6	2	12
Sum of Bedrooms or units		484	733	244	1,461
Sum of Bedspaces		1,988	3,215	986	6,189
Sum of Total touring pitches			175		175
Sum of Total static units		457	558	244	1,259
Sum of Total static lodges		27			27

Torbay Accommodation Audit 2019

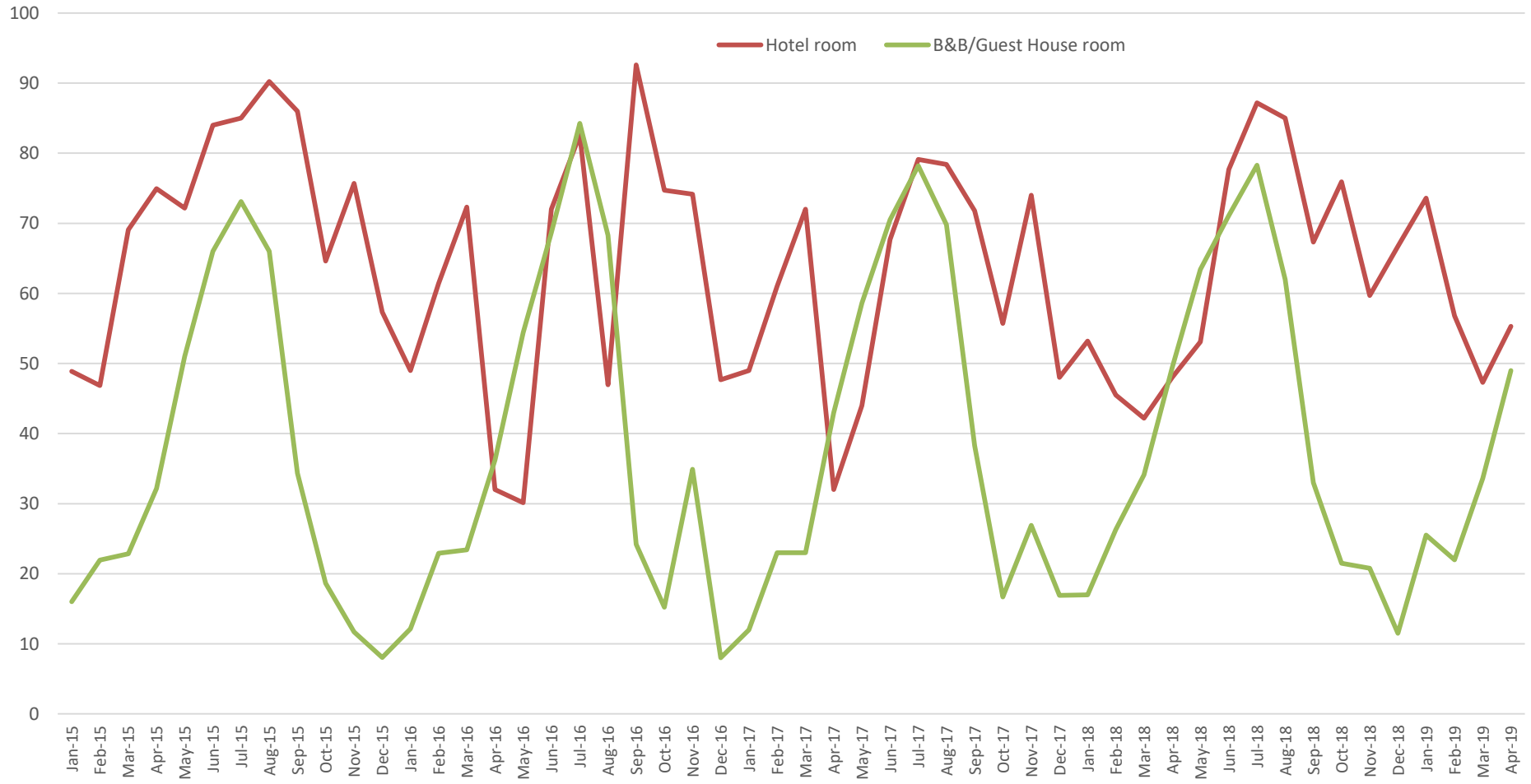
Accommodation Audit – Bedspace capacity by business type and location 2019

Accommodation type	Babbacombe	Brixham	Paignton	Torquay	Grand Total
Hostel					
Count of businesses	1	1	1	2	5
Sum of Bedrooms or units		1	1	17	19
Sum of Bedspaces	24	81	46	84	235
Hotel					
Count of businesses	23	4	34	60	121
Sum of Bedrooms or units	768	96	957	2,969	4,790
Sum of Bedspaces	1,533	193	2,300	6,557	10,583
Inn					
Count of businesses	2	2			4
Sum of Bedrooms or units	12	24			36
Sum of Bedspaces	28	48			76
Self Catering					
Count of businesses	21	178	123	171	493
Sum of Bedrooms or units	72	238	380	557	1,247
Sum of Bedspaces	288	1,126	1,476	2,110	5,000
Total Count of businesses	70	216	265	364	915
Total Sum of Bedrooms or units	1,018	1,131	3,933	4,920	11,002
Total Sum of Bedspaces	2,214	4,271	12,358	12,206	31,049
Total Sum of Total touring pitches		390	876		1,266
Total Sum of Total static units	72	697	1,335	801	2,905
Total Sum of Total static lodges		27	4		31

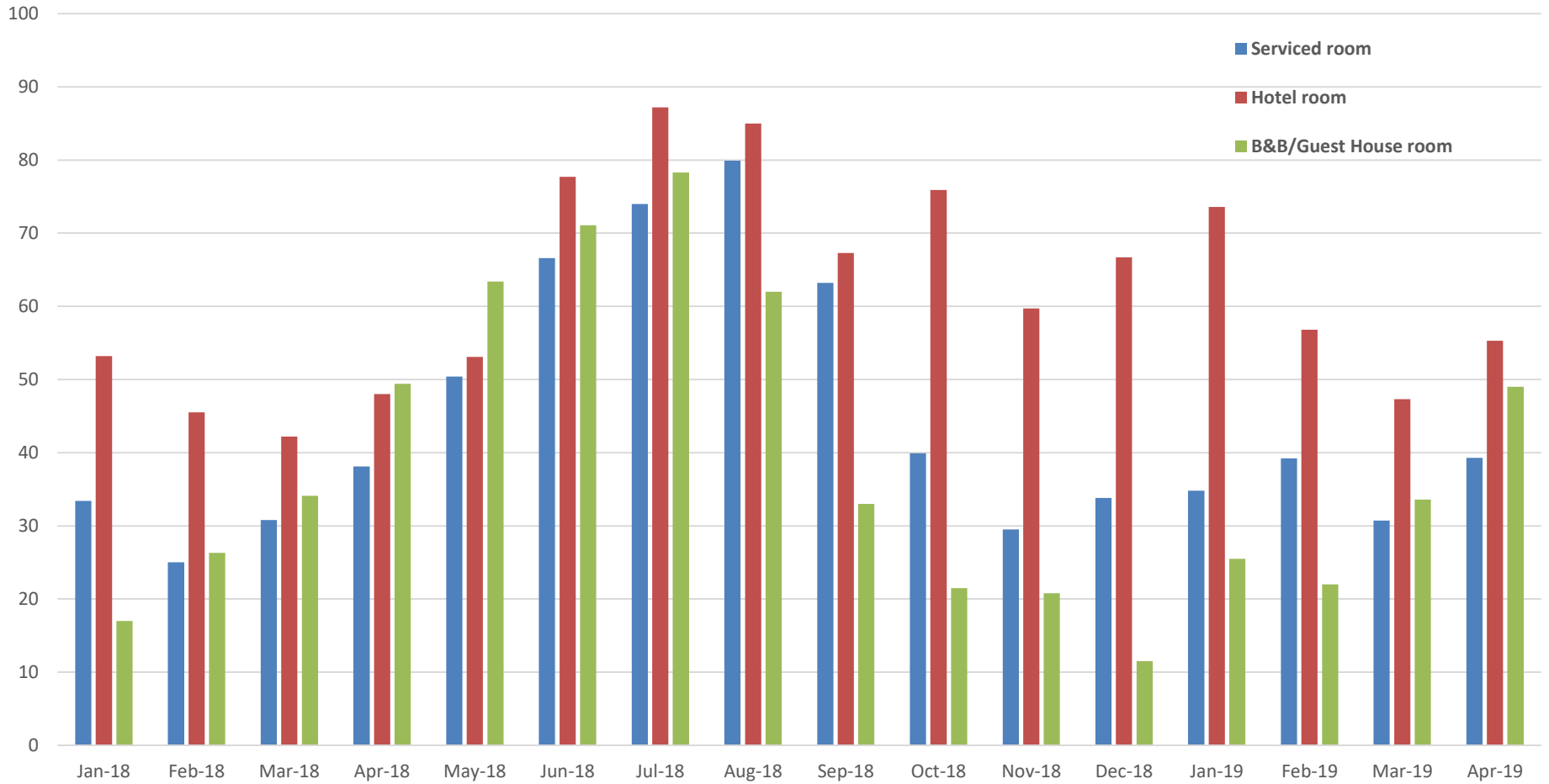
English Riviera Serviced Room Occupancy January 2015 - April 2019



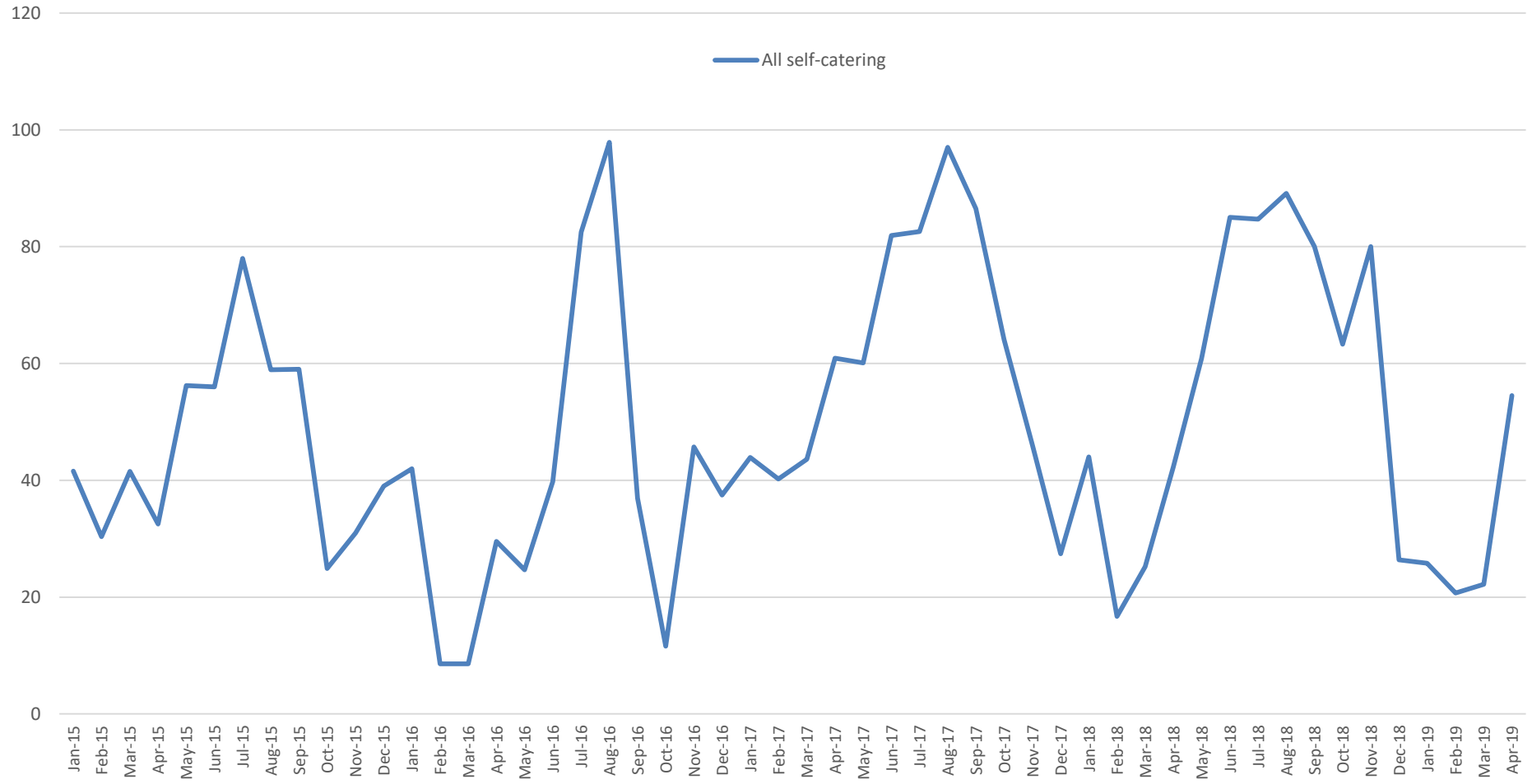
English Riviera Serviced Room Occupancy by Type January 2015 - April 2019



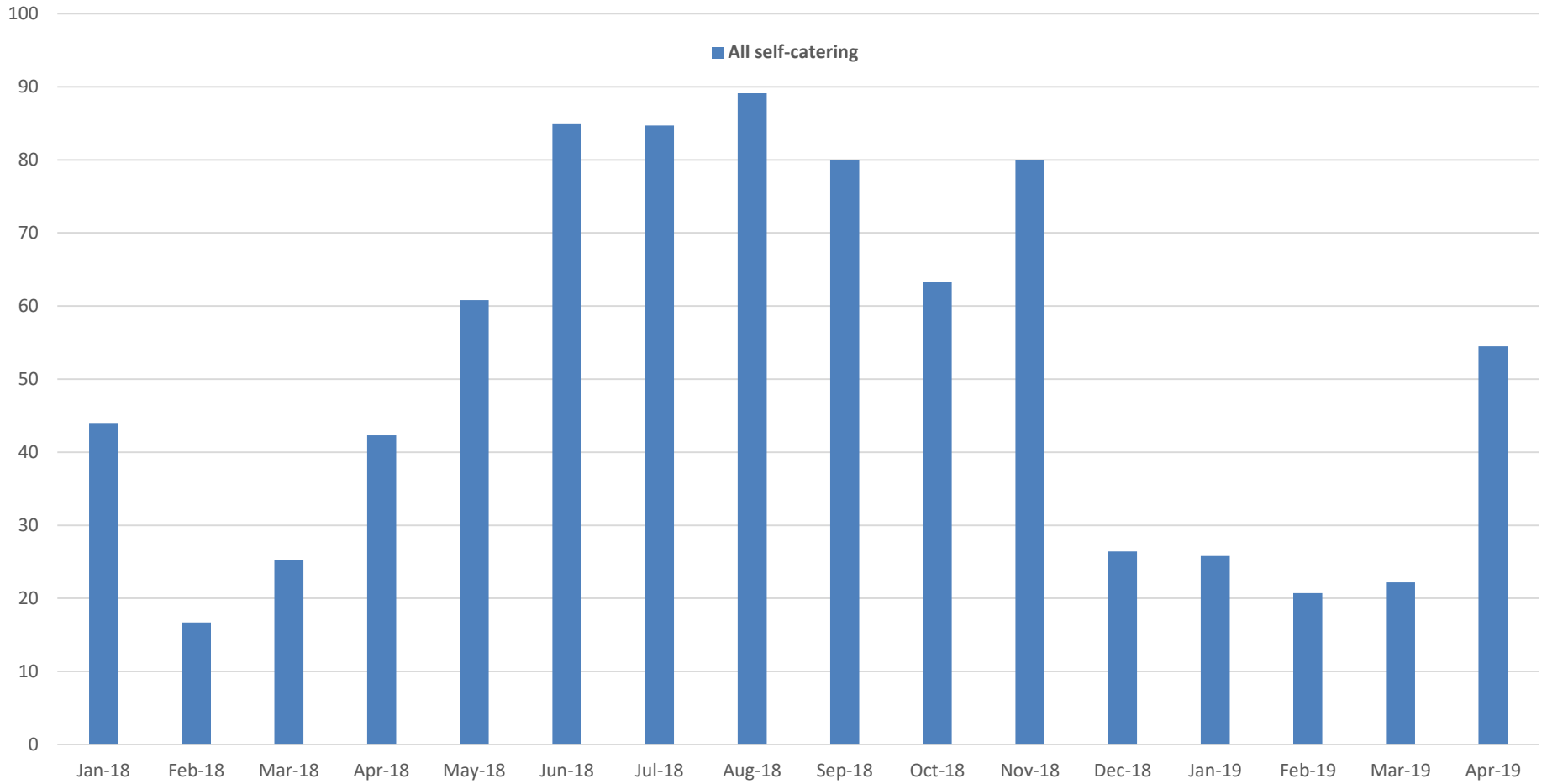
English Riviera Serviced Room Occupancy by Type January 2018 - April 2019



English Riviera Self-Catering Unit Occupancy January 2015 - April 2019



English Riviera Self Catering Unit Occupancy January 2018 - April 2019



For further information contact info@tswrc.co.uk

