

# The Economic Impact of Gloucestershire's Visitor Economy 2013



## Forest of Dean

Produced on behalf of Forest of Dean District Council  
By  
The South West Research Company Ltd



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# 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 the Forest of Dean and Gloucestershire county in 2013.

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 2013, including key facts about the economy, weather and key events please see Appendix 2 of this report.

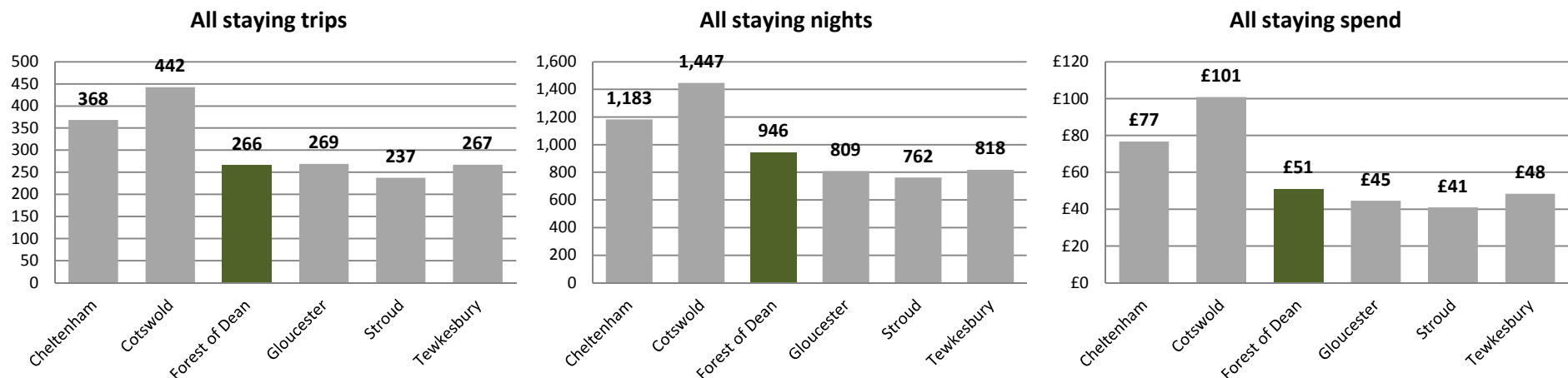


# Value of Tourism 2013

## Forest of Dean

Key Facts	
266,300	Staying visitor trips
946,000	Staying visitor nights
£50,918,000	Staying visitor spend
2,601,000	Day visits
£77,976,000	Day visitor spend
£128,894,000	Direct visitor spend
£5,927,000	Other related spend
£134,821,000	TOTAL VISITOR RELATED SPEND
3,139	Estimated actual employment
2,250	FTE employment
8%	Proportion of all employment

# Forest of Dean - 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)
Cheltenham	318	50	793	390	£52	£25
Cotswold	391	52	1,073	374	£74	£27
Forest of Dean	234	33	656	290	£33	£18
Gloucester	230	38	548	261	£28	£16
Stroud	207	30	530	232	£27	£14
Tewkesbury	231	36	589	229	£33	£15

## Forest of Dean - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	32,900	67,000	£6,903,000
Self catering	43,400	141,000	£12,834,000
Touring caravans /tents	52,700	188,000	£5,409,000
Static vans/holiday centres	0	0	£0
Group/campus	12,700	20,000	£1,522,000
Paying guest in private homes	0	0	£0
Second homes	500	10,000	£164,000
Boat moorings	0	0	£0
Other	2,200	4,000	£358,000
Staying with friends and relatives	89,400	225,000	£5,974,000
<b>Total</b>	<b>233,700</b>	<b>656,000</b>	<b>£33,166,000</b>

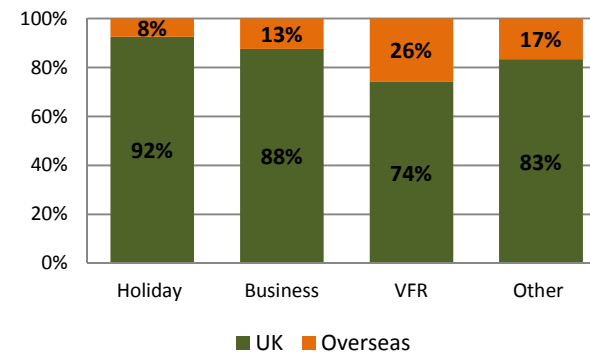
Overseas tourists	Trips	Nights	Spend
Serviced	6,600	22,000	£2,698,000
Self catering	1,700	37,000	£2,504,000
Touring caravans /tents	4,800	22,000	£1,218,000
Static vans/holiday centres	0	0	£0
Group/campus	6,000	87,000	£5,780,000
Paying guest in private homes	0	0	£0
Second homes	300	5,000	£256,000
Boat moorings	0	0	£0
Other	1,800	8,000	£569,000
Staying with friends and relatives	11,500	109,000	£4,726,000
<b>Total</b>	<b>32,600</b>	<b>290,000</b>	<b>£17,752,000</b>

# Forest of Dean - Staying visits by purpose

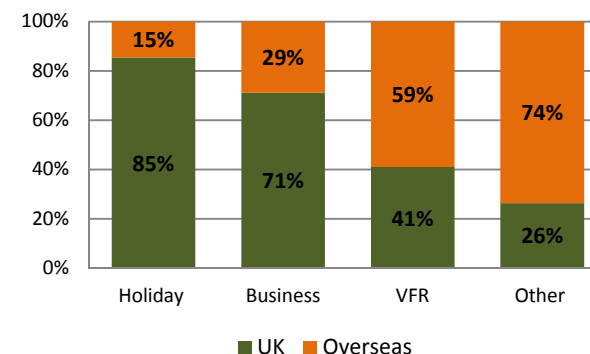
Domestic tourists	Trips	Nights	Spend
Holiday	172,000	499,000	£21,888,000
Business	14,000	32,000	£7,794,000
Visits to friends and relatives	43,000	114,000	£2,985,000
Other	5,000	10,000	£499,000
Study	0	0	£0
<b>Total</b>	<b>234,000</b>	<b>656,000</b>	<b>£33,166,000</b>

Overseas tourists	Trips	Nights	Spend
Holiday	14,000	85,000	£6,792,000
Business	2,000	13,000	£1,671,000
Visits to friends and relatives	15,000	164,000	£7,450,000
Other	1,000	28,000	£1,839,000
Study	0	0	£0
<b>Total</b>	<b>33,000</b>	<b>290,000</b>	<b>£17,752,000</b>

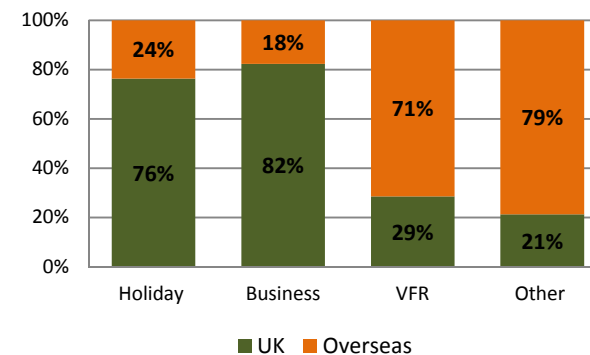
Trips



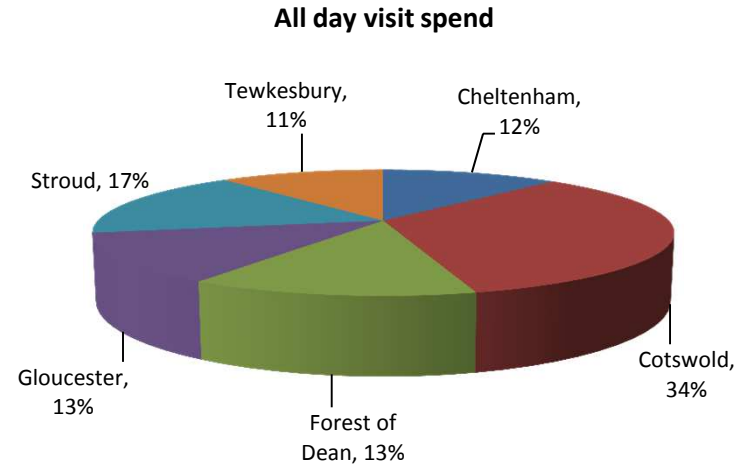
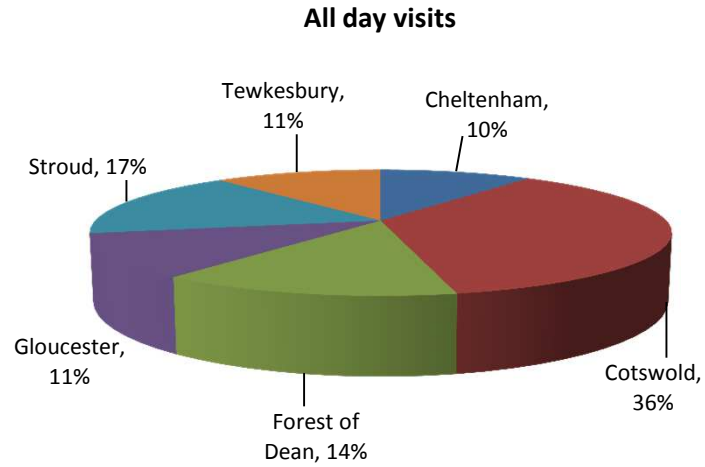
Nights



Spend



# Forest of Dean - Day visits in the county context

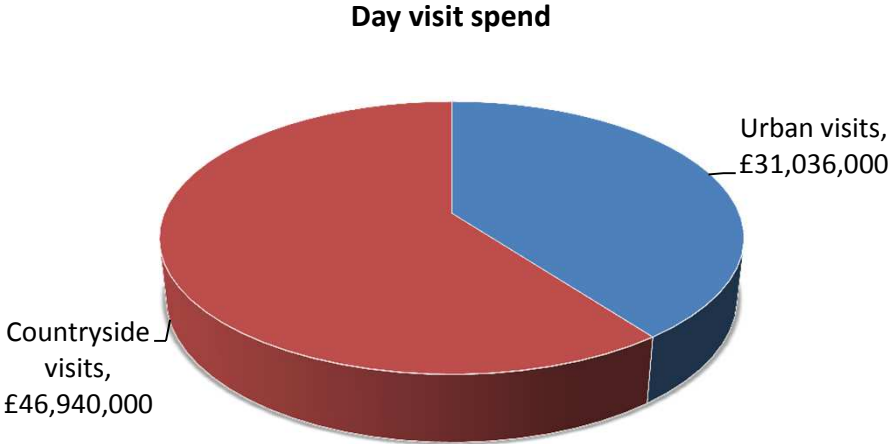
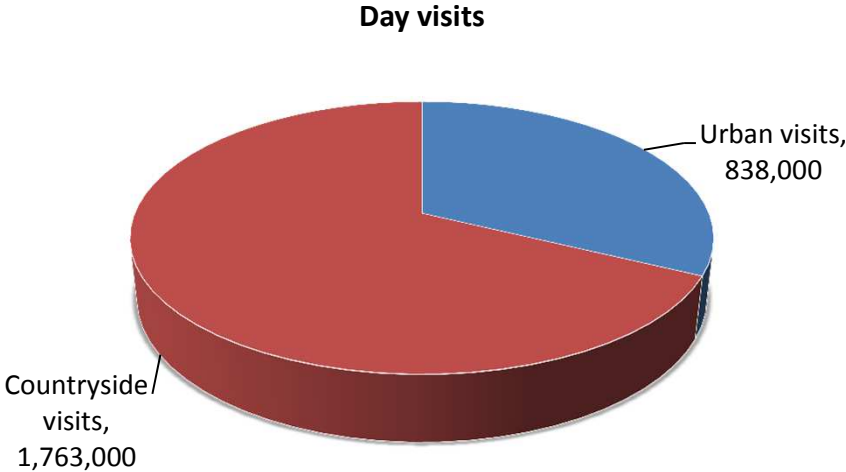


Area	Day visits	Day visit spend
Cheltenham	1.9	£69.0
Cotswold	6.7	£196.9
Forest of Dean	2.6	£78.0
Gloucester	2.1	£74.5
Stroud	3.1	£99.0
Tewkesbury	2.1	£64.3



# Forest of Dean - Day visits by location

Total day visits	Total day visit spend
2,601,000	£77,976,000



# Forest of Dean – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £12,279,000
- Overseas staying visitors £4,796,000



## Shopping

- UK staying visitors £3,906,000
- Overseas staying visitors £5,206,000
- Day visitors £22,570,000



## Food & drink

- UK staying visitors £7,566,000
- Overseas staying visitors £4,040,000
- Day visitors £33,346,000



## Attractions/entertainment

- UK staying visitors £3,263,000
- Overseas staying visitors £1,925,000
- Day visitors £11,435,000



## Travel

- UK staying visitors £6,151,000
- Overseas staying visitors £1,785,000
- Day visitors £10,625,000

## Forest of Dean – Other visitor related expenditure by category

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Second Homes  
£138,000



Visiting friends and relatives (non-visitor spend)  
£5,789,000

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

# Forest of Dean – Tourism related employment

## Estimated actual employment



## Full time equivalent employment (FTE's)

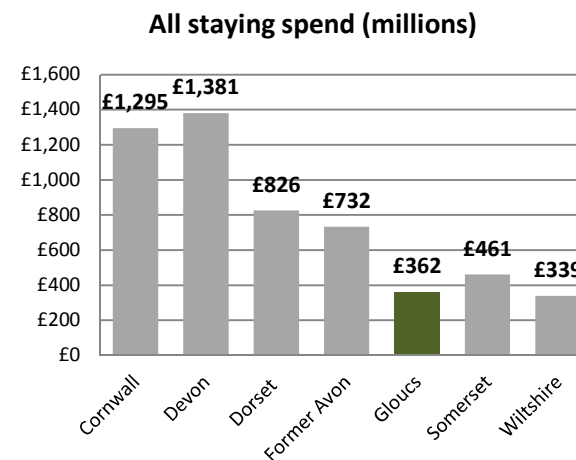
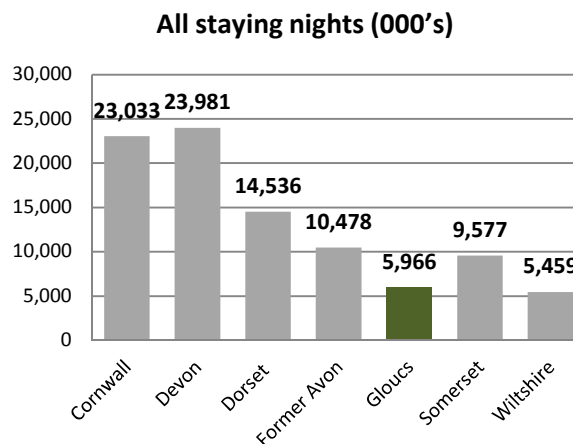
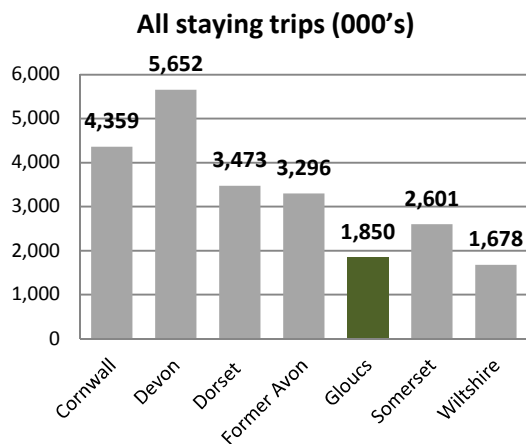


Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	301	12	313
Retailing	87	214	301
Catering	172	495	667
Attractions/entertainment	112	249	362
Transport	34	45	79
Arising from non trip spend	94	0	94
<b>Total Direct</b>	<b>800</b>	<b>1,016</b>	<b>1,816</b>

# **Gloucestershire county 2013**

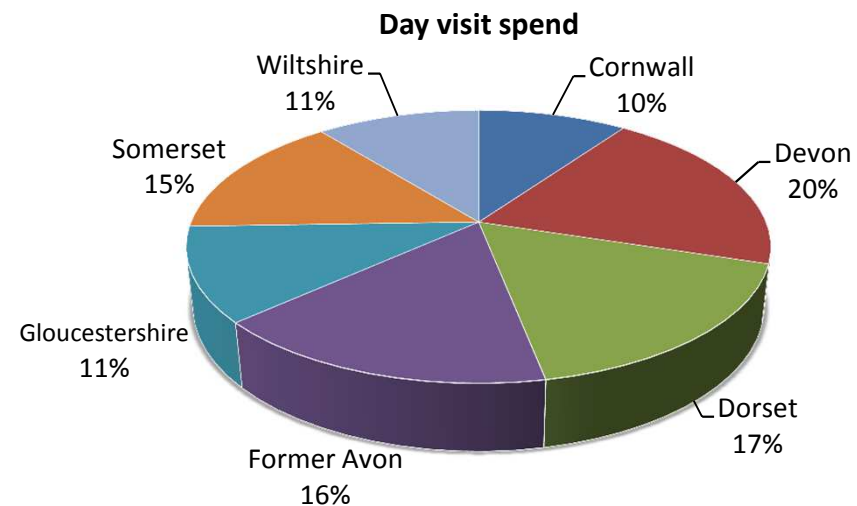
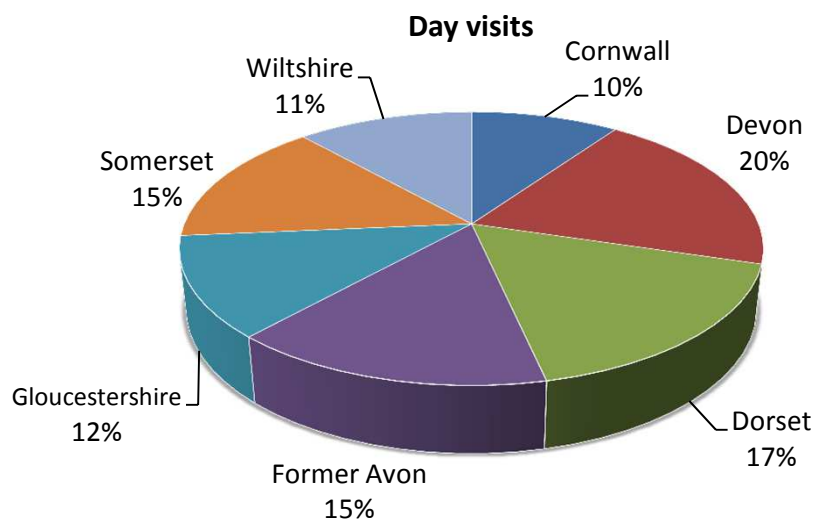


# Gloucestershire - Staying visits in the regional context



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cornwall	4,040	319	20,720	2,313	£1,168	£127
Devon	5,116	536	19,590	4,391	£1,122	£259
Dorset	3,117	356	11,459	3,077	£649	£177
Former Avon	2,573	723	6,491	3,987	£472	£260
Gloucestershire	1,611	239	4,190	1,776	£248	£115
Somerset	2,389	212	8,072	1,505	£386	£75
Wiltshire	1,429	249	3,930	1,529	£255	£83

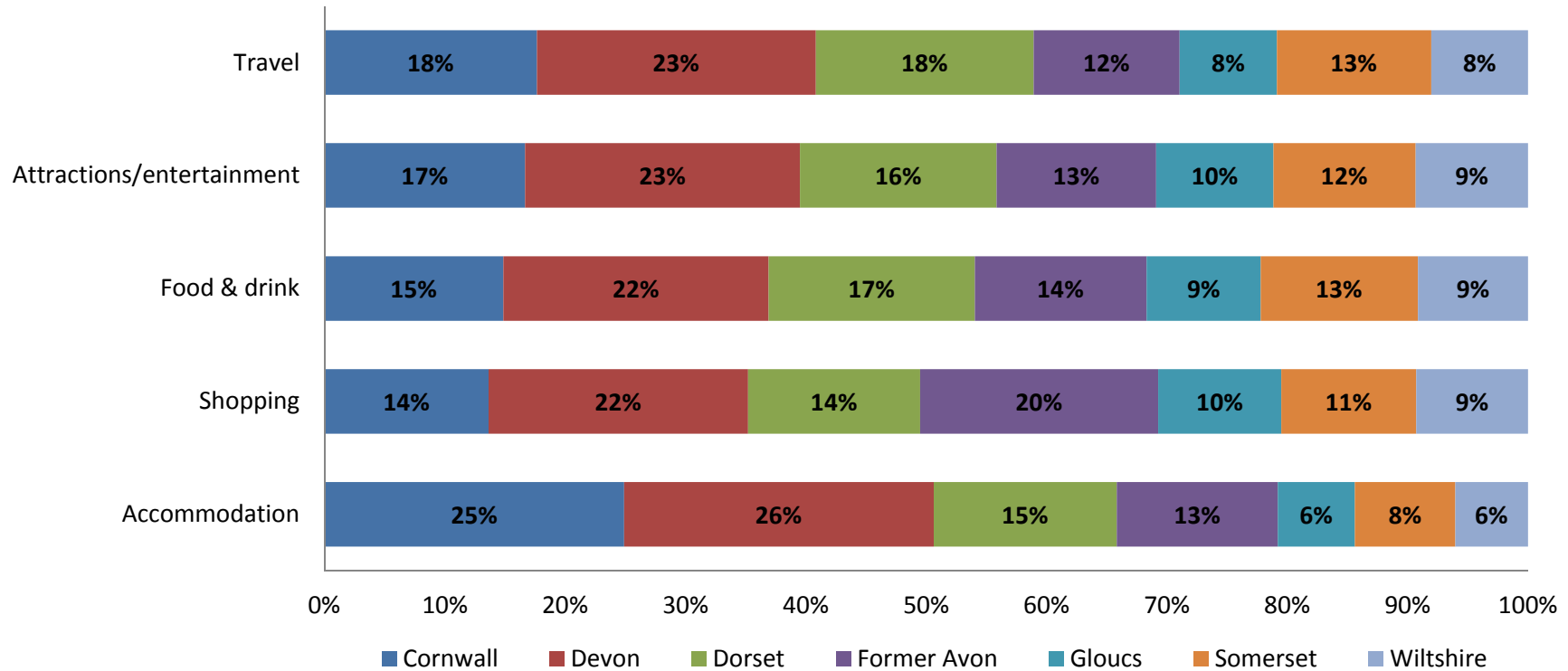
# Gloucestershire - Day visits in the regional context



Area	Day visits (millions)	Day visit spend (millions)
Cornwall	15.2	£509.1
Devon	31.0	£1,041.2
Dorset	26.3	£887.6
Former Avon	23.6	£851.2
Gloucestershire	18.5	£581.7
Somerset	23.0	£766.9
Wiltshire	18.0	£557.7

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

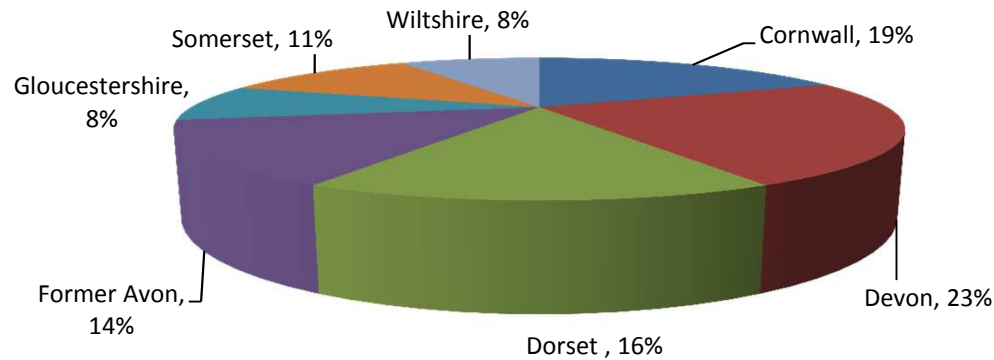
South West	Accommodation	Shopping	Food & drink	Attractions/entertainment	Travel	TOTAL
<b>Spend</b>	£1,929,690,000	£2,456,526,000	£3,399,276,000	£1,200,599,000	£1,607,146,000	£10,593,240,000
<b>%</b>	18%	23%	32%	11%	15%	100%





# Gloucestershire – Tourism related employment in the regional context

Distribution of tourism related employment (FTE's)



Area	Number of FTE's
Cornwall	43,109
Devon	53,963
Dorset	36,217
Former Avon	32,645
Gloucestershire	19,047
Somerset	26,156
Wiltshire	19,272

% of all county employment

