

The Economic Impact of Gloucestershire's Visitor Economy 2012



Forest of Dean

Produced on behalf of Forest of Dean 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 Forest of Dean and Gloucestershire county in 2012.

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 2012, including key facts about the economy, weather and key events please see Appendix 2 of this report.

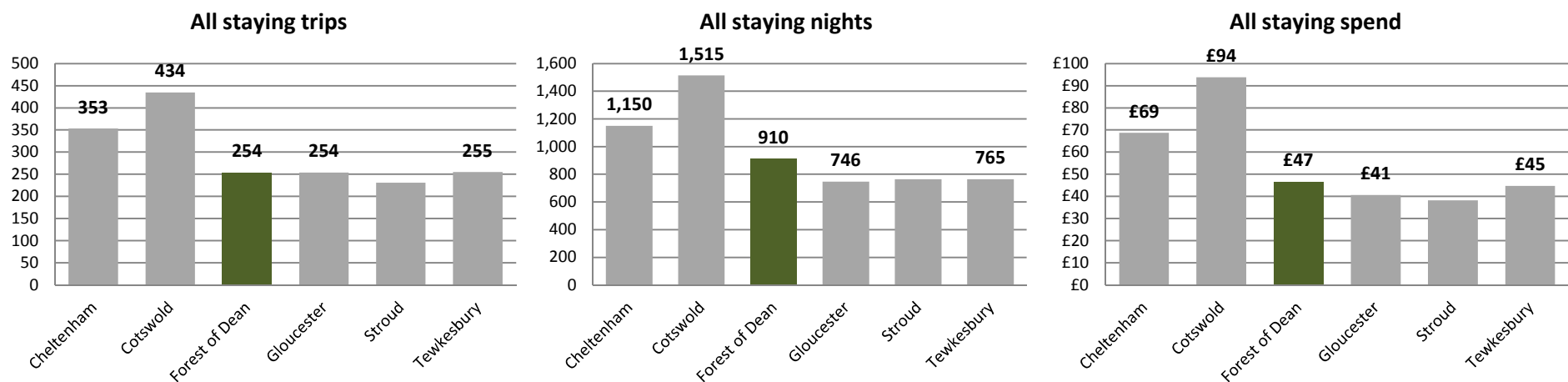


Value of Tourism 2012

Forest of Dean

Key Facts	
253,800	Staying visitor trips
910,000	Staying visitor nights
£46,679,000	Staying visitor spend
2,547,000	Day visits
£89,406,000	Day visitor spend
£136,085,000	Direct visitor spend
£5,469,000	Other related spend
£141,554,000	TOTAL VISITOR RELATED SPEND
3,448	Estimated actual employment
2,462	FTE employment
9%	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	307	47	828	322	£49	£19
Cotswold	387	47	1,209	306	£72	£22
Forest of Dean	224	29	677	233	£33	£14
Gloucester	218	36	512	234	£27	£14
Stroud	201	30	554	211	£26	£12
Tewkesbury	223	32	570	195	£32	£12

Forest of Dean - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	31,300	58,000	£6,303,000
Self catering	41,900	201,000	£12,246,000
Touring caravans /tents	46,400	156,000	£5,583,000
Static vans/holiday centres	0	0	£0
Group/campus	14,700	21,000	£2,160,000
Paying guest in private homes	0	0	£0
Second homes	4,400	21,000	£217,000
Boat moorings	0	0	£0
Other	4,400	12,000	£674,000
Staying with friends and relatives	81,300	208,000	£5,605,000
Total	224,400	677,000	£32,788,000

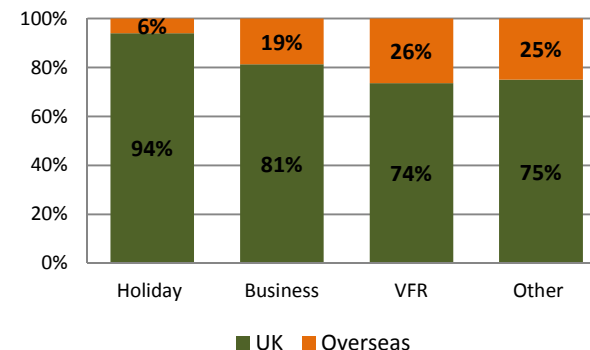
Overseas tourists	Trips	Nights	Spend
Serviced	5,600	17,000	£2,213,000
Self catering	1,600	20,000	£1,357,000
Touring caravans /tents	3,000	12,000	£527,000
Static vans/holiday centres	0	0	£0
Group/campus	5,100	62,000	£4,509,000
Paying guest in private homes	0	0	£0
Second homes	400	8,000	£411,000
Boat moorings	0	0	£0
Other	1,200	8,000	£477,000
Staying with friends and relatives	12,500	106,000	£4,397,000
Total	29,400	233,000	£13,891,000

Forest of Dean - Staying visits by purpose

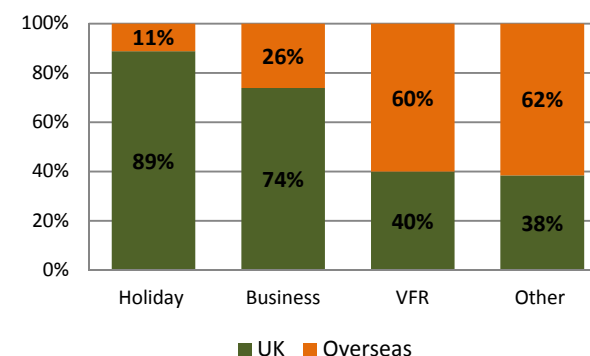
Domestic tourists	Trips	Nights	Spend
Holiday	169,000	543,000	£22,316,000
Business	13,000	34,000	£6,652,000
Visits to friends and relatives	39,000	95,000	£3,485,000
Other	3,000	5,000	£336,000
Study	0	0	£0
Total	224,000	677,000	£32,788,000

Overseas tourists	Trips	Nights	Spend
Holiday	11,000	69,000	£5,552,000
Business	3,000	12,000	£1,450,000
Visits to friends and relatives	14,000	143,000	£5,932,000
Other	1,000	8,000	£957,000
Study	0	0	£0
Total	29,000	233,000	£13,891,000

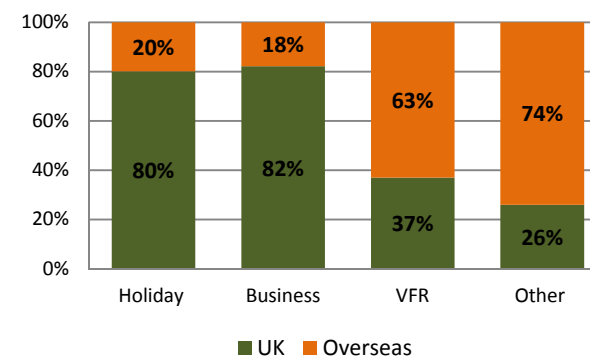
Trips



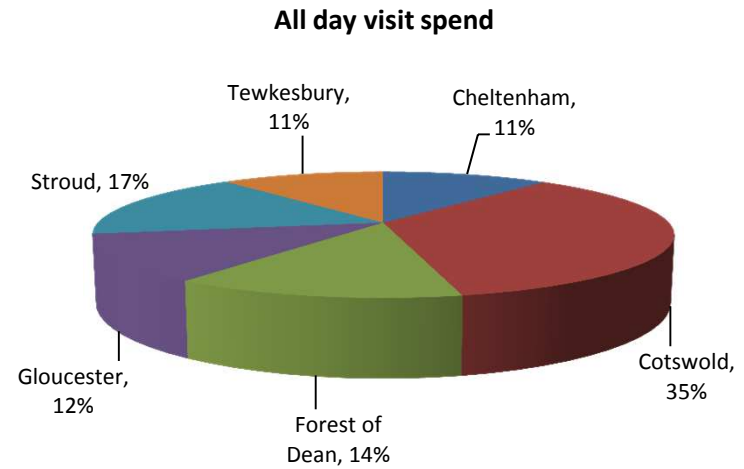
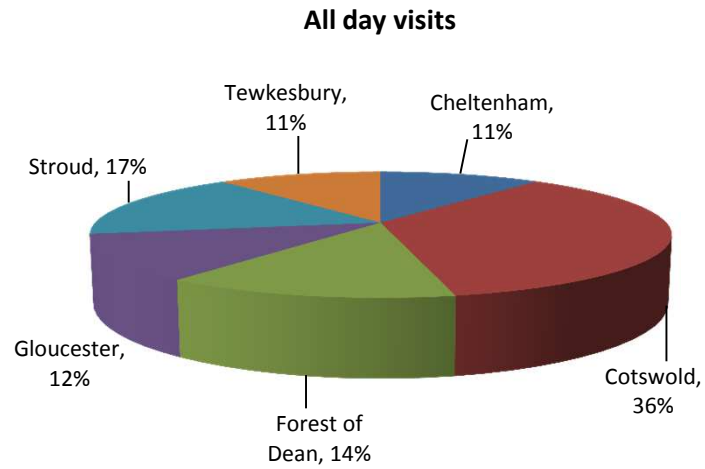
Nights



Spend



Forest of Dean - Day visits in the county context

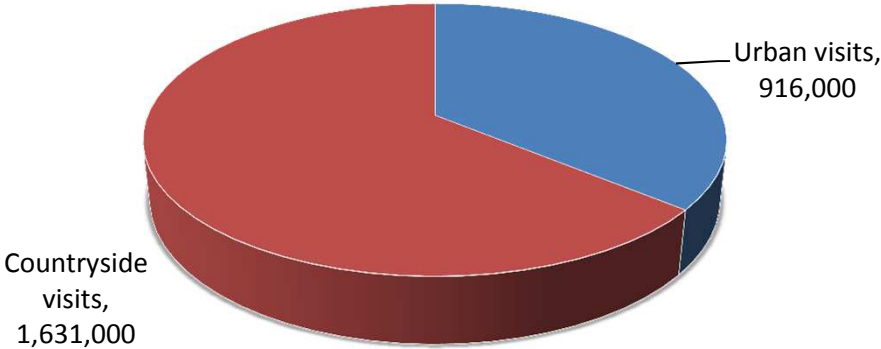


Area	Day visits	Day visit spend
Cheltenham	2.0	£73.5
Cotswold	6.6	£231.4
Forest of Dean	2.5	£89.4
Gloucester	2.2	£80.2
Stroud	3.1	£111.1
Tewkesbury	2.0	£72.0

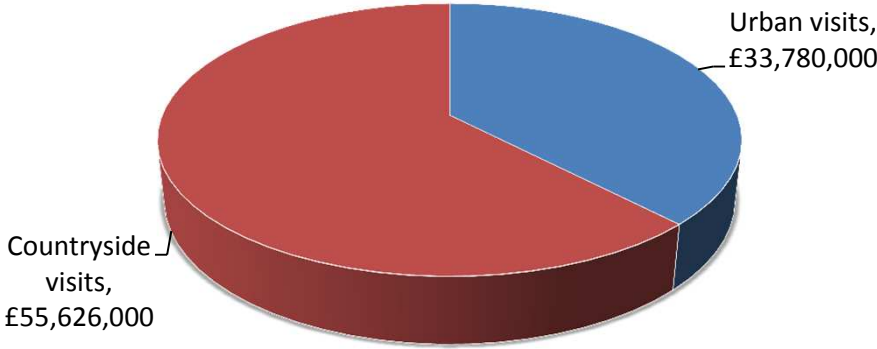
Forest of Dean - Day visits by location

Total day visits	Total day visit spend
2,547,000	£89,406,000

Day visits



Day visit spend



Forest of Dean – Direct visitor expenditure by category



Accommodation

- UK staying visitors £11,976,000
- Overseas staying visitors £3,788,000



Shopping

- UK staying visitors £3,937,000
- Overseas staying visitors £4,037,000
- Day visitors £25,427,000



Food & drink

- UK staying visitors £7,508,000
- Overseas staying visitors £3,204,000
- Day visitors £13,263,000



Attractions/entertainment

- UK staying visitors £3,310,000
- Overseas staying visitors £1,443,000
- Day visitors £13,263,000



Travel

- UK staying visitors £6,057,000
- Overseas staying visitors £1,418,000
- Day visitors £12,213,000

Forest of Dean – Other visitor related expenditure by category



Second Homes
£138,000



Visiting friends and relatives (non-visitor spend)
£5,331,000

- 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



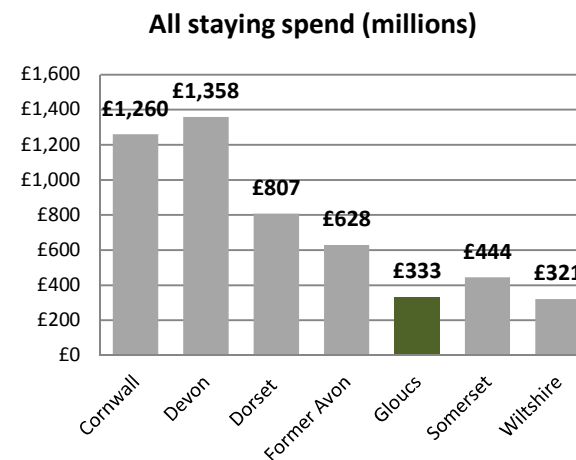
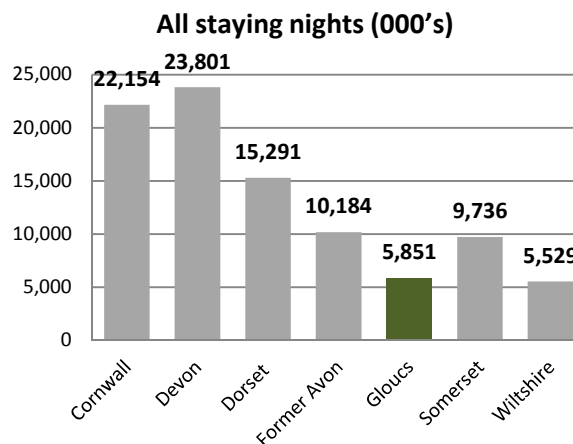
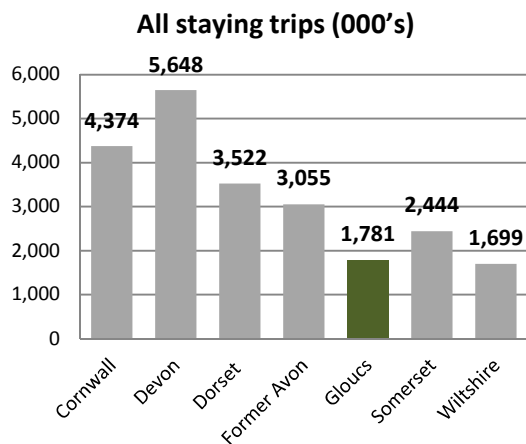
Full time equivalent employment (FTE's)



Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	280	13	293
Retailing	79	250	329
Catering	179	641	820
Attractions/entertainment	102	287	388
Transport	33	55	88
Arising from non trip spend	87	0	87
Total Direct	759	1,246	2,005

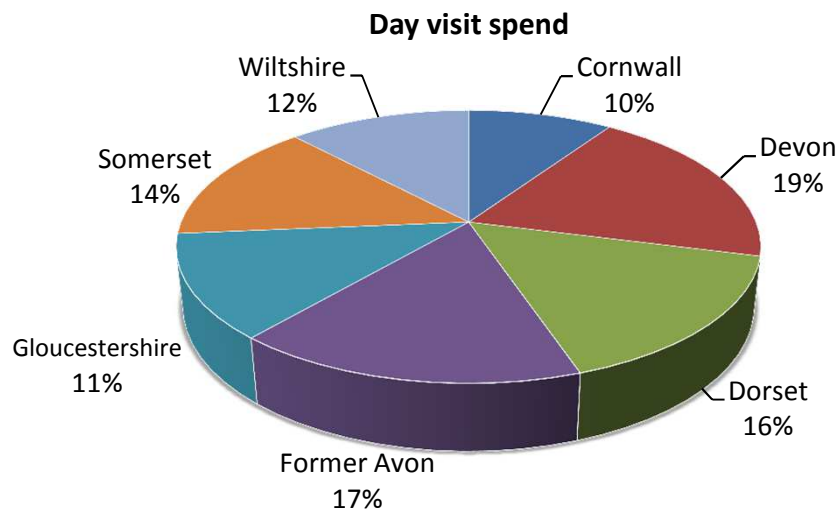
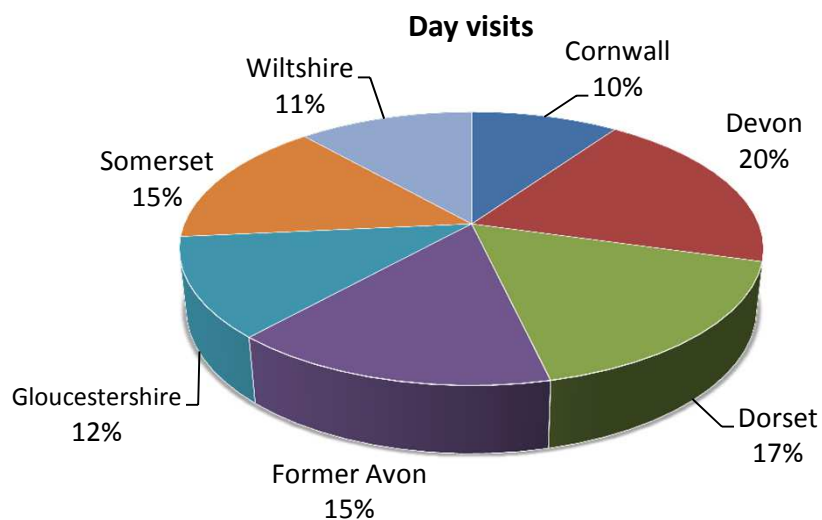
Gloucestershire county 2012

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	4,070	304	20,100	2,054	£1,131	£129
Devon	5,260	388	20,250	3,551	£1,157	£201
Dorset	3,149	373	11,859	3,432	£607	£200
Former Avon	2,436	619	6,584	3,600	£431	£197
Gloucestershire	1,560	221	4,350	1,501	£240	£93
Somerset	2,260	184	8,355	1,381	£367	£77
Wiltshire	1,460	239	3,930	1,599	£248	£73

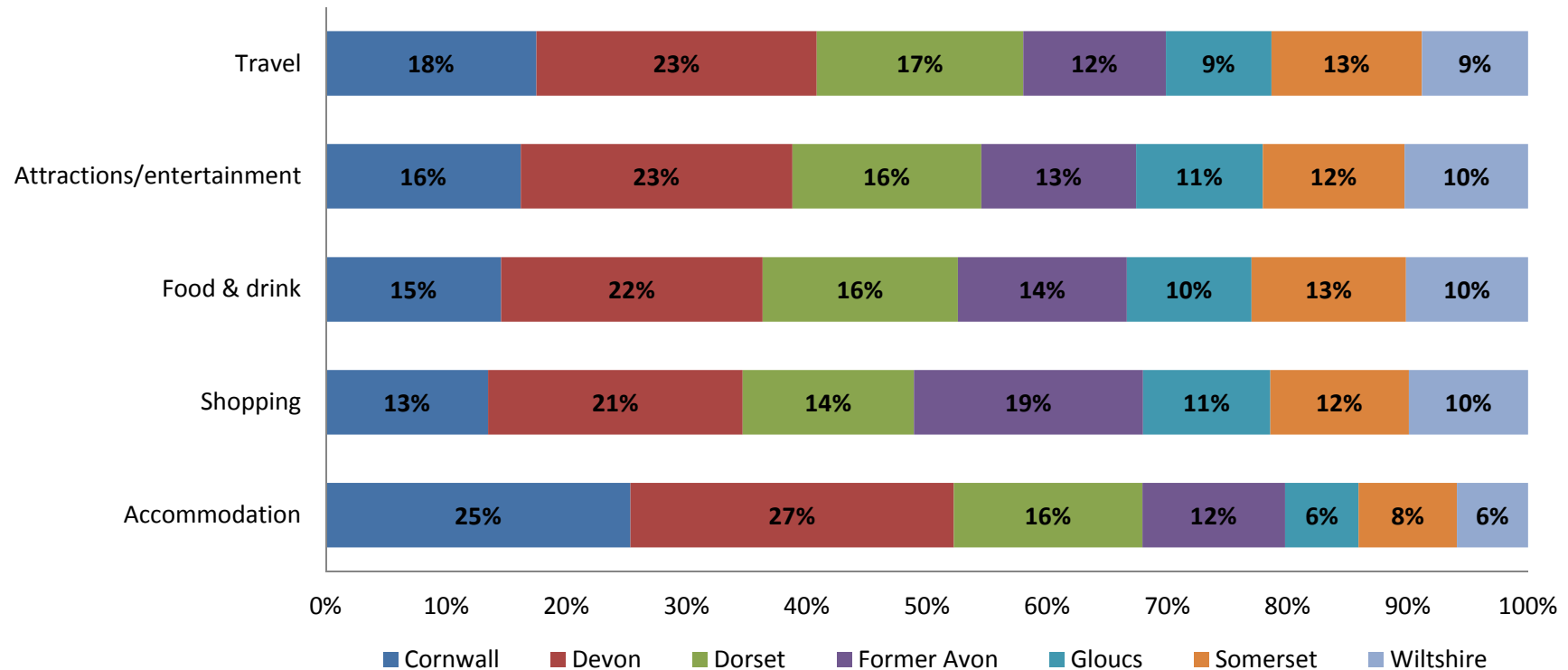
Gloucestershire - Day visits in the regional context



Area	Day visits (millions)	Day visit spend (millions)
Cornwall	15.2	£506.2
Devon	30.8	£1,037.0
Dorset	26.6	£842.9
Former Avon	24.0	£880.2
Gloucestershire	18.5	£657.6
Somerset	23.5	£765.3
Wiltshire	18.0	£638.4

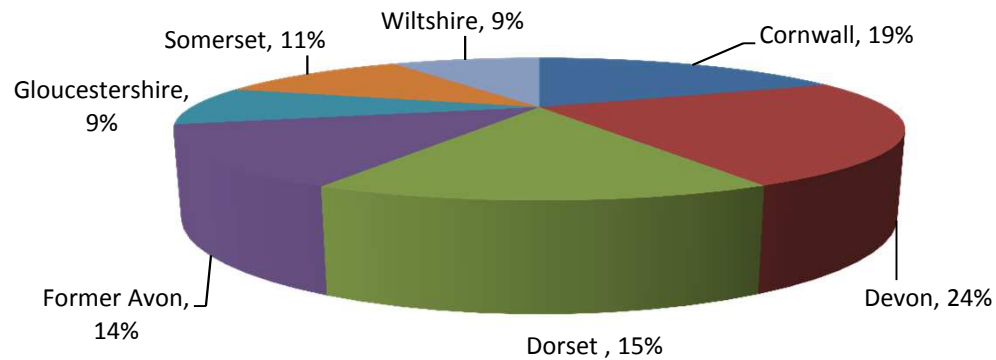
Gloucestershire – Direct visitor expenditure by category in the regional context

South West	Accommodation	Shopping	Food & drink	Attractions/entertainment	Travel	TOTAL
Spend	£1,858,768,000	£2,495,180,000	£3,370,065,000	£1,199,289,000	£1,555,565,000	£10,478,868,000
%	18%	24%	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	43,212
Devon	54,410
Dorset	35,350
Former Avon	31,300
Gloucestershire	20,214
Somerset	26,167
Wiltshire	20,565

% of all county employment

