

The Economic Impact of Gloucestershire's Visitor Economy 2018

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



October 2019



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Introduction

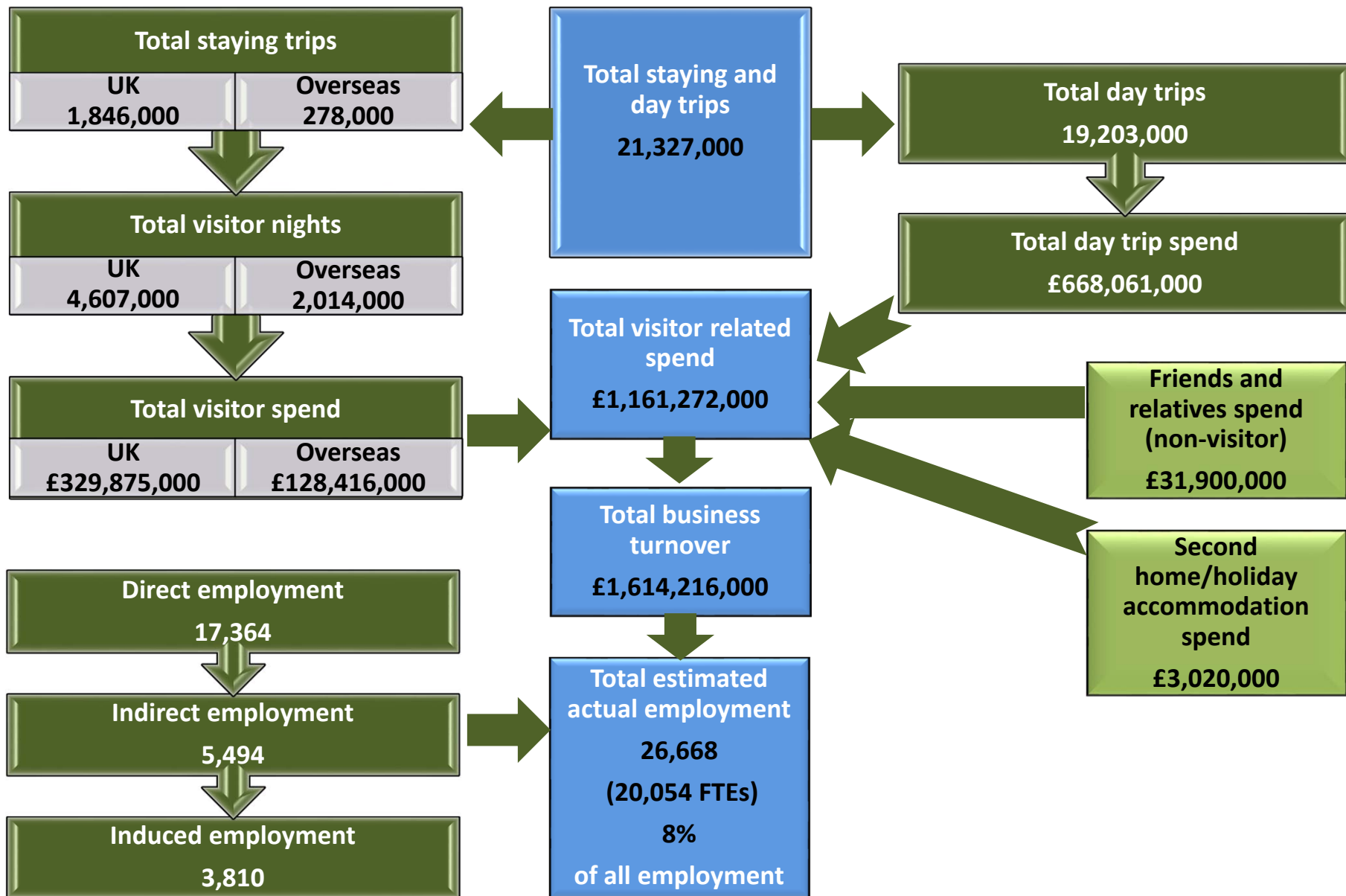
This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in Gloucestershire in 2018.

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 2018, including key facts about the economy, weather and key events please see Appendix 2 of this report.

Gloucestershire - Key facts at a glance

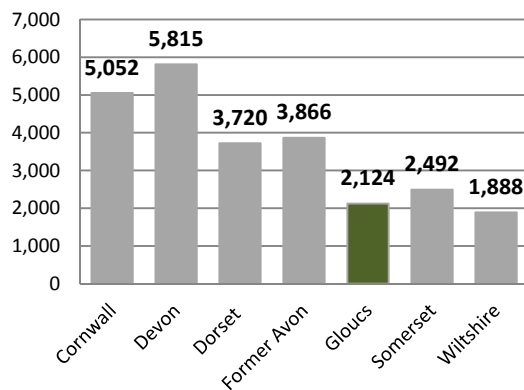


Gloucestershire – Staying visits

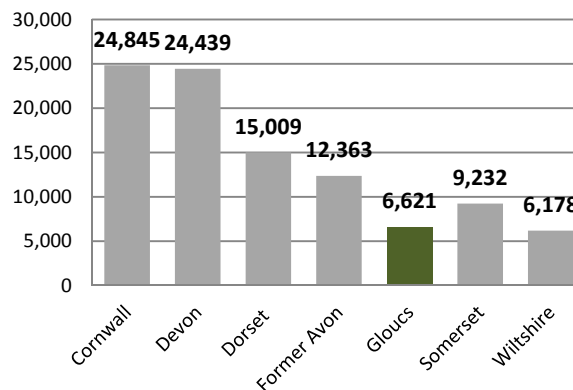
Information on staying visits is derived from the Great Britain Tourism Survey (GBTS) for domestic visitors and from the International Passenger Survey (IPS) for Overseas visitors. The methodology of both surveys has been stable since 2006 allowing for direct comparison between years and the analysis of trend data. Data at a county level is derived from the national surveys for trips, nights and spend but adjusted to account for local data and modelled below this level.

Gloucestershire - Staying visits in the regional context

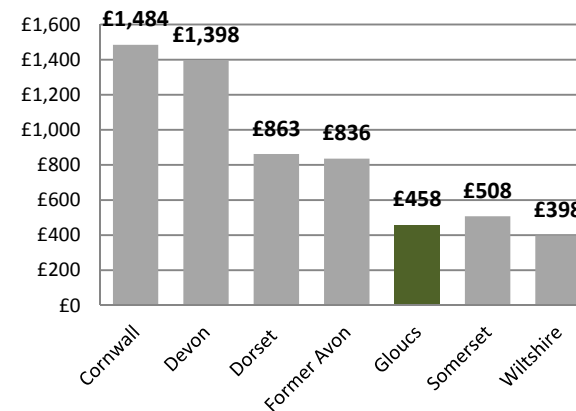
All staying trips (000's)



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)
Cornwall	4,670	382	22,190	2,655	£1,321	£163
Devon	5,357	458	21,129	3,310	£1,198	£199
Dorset	3,347	373	11,759	3,250	£649	£214
Former Avon	2,904	962	6,625	5,738	£494	£342
Gloucestershire	1,846	278	4,607	2,014	£330	£128
Somerset	2,252	240	7,509	1,723	£421	£87
Wiltshire	1,575	313	4,275	1,903	£281	£117

Gloucestershire - Staying visits by accommodation type

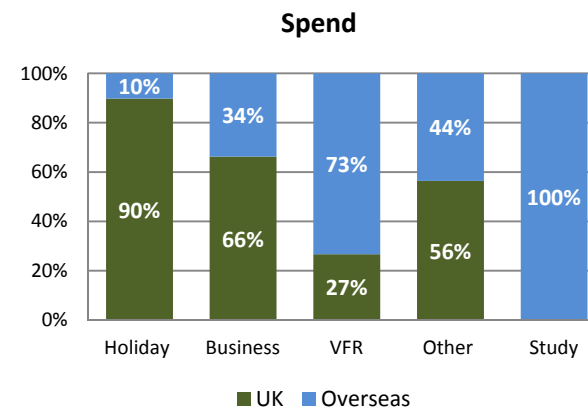
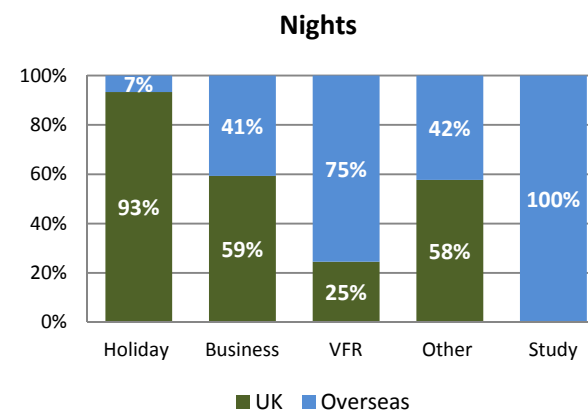
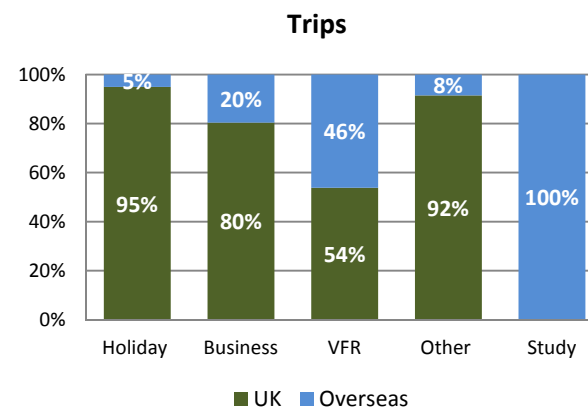
Domestic tourists	Trips	Nights	Spend
Serviced	638,000	1,210,000	£148,847,000
Self catering	340,000	1,073,000	£94,016,000
Touring caravans /tents	165,000	588,000	£22,948,000
Static vans/holiday centres	2,000	10,000	£477,000
Group/campus	26,000	53,000	£2,462,000
Paying guest in private homes	0	0	£0
Second homes	37,000	133,000	£3,198,000
Boat moorings	16,000	49,000	£3,643,000
Other	18,000	73,000	£3,559,000
Staying with friends and relatives	604,000	1,418,000	£50,725,000
Total	1,846,000	4,607,000	£329,875,000

Overseas tourists	Trips	Nights	Spend
Serviced	114,000	392,000	£49,970,000
Self catering	15,000	237,000	£11,730,000
Touring caravans /tents	12,000	51,000	£2,556,000
Static vans/holiday centres	0	0	£55,000
Group/campus	11,000	209,000	£13,212,000
Paying guest in private homes	4,000	63,000	£3,320,000
Second homes	4,000	68,000	£2,907,000
Boat moorings	0	0	£0
Other	21,000	63,000	£4,151,000
Staying with friends and relatives	97,000	931,000	£40,515,000
Total	278,000	2,014,000	£128,416,000

Gloucestershire - Staying visits by purpose

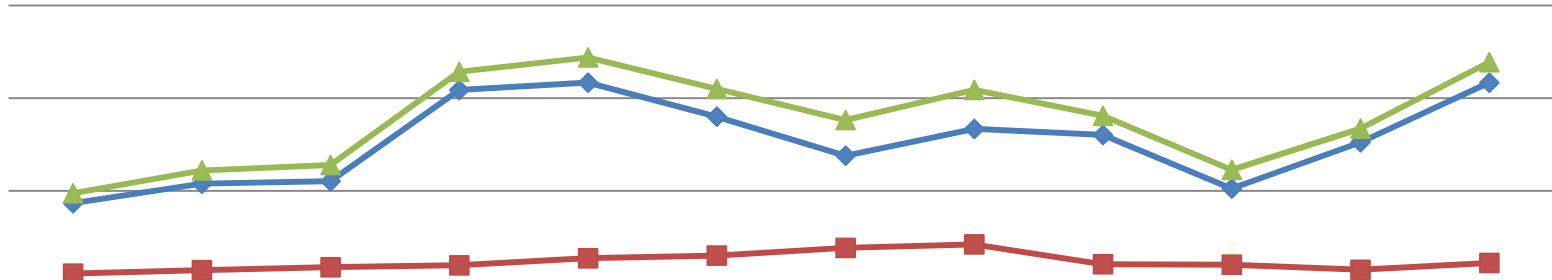
Domestic tourists	Trips	Nights	Spend
Holiday	1,394,000	3,592,000	£249,786,000
Business	242,000	513,000	£51,374,000
Visits to friends and relatives	156,000	300,000	£18,839,000
Other	54,000	202,000	£9,876,000
Study	0	0	£0
Total	1,846,000	4,607,000	£329,875,000

Overseas tourists	Trips	Nights	Spend
Holiday	74,000	256,000	£28,521,000
Business	59,000	352,000	£26,133,000
Visits to friends and relatives	134,000	923,000	£51,719,000
Other	5,000	148,000	£7,642,000
Study	6,000	336,000	£14,401,000
Total	278,000	2,014,000	£128,416,000



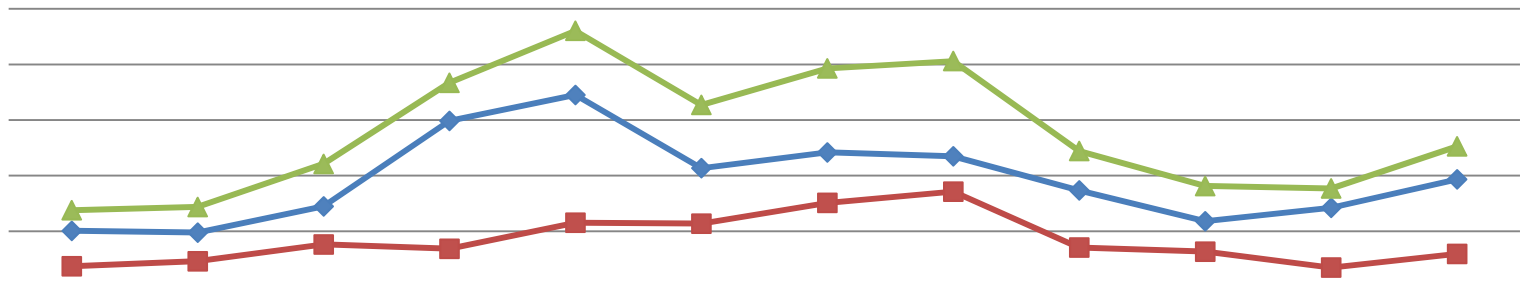
Gloucestershire - Estimated seasonality of staying visits

Seasonality - trips



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK trips (000's)	86.7	107.7	110.3	208.8	216.6	179.9	137.9	166.7	160.2	102.4	152.3	216.6
OS trips (000's)	10.7	14.3	17.5	19.6	27.3	30.0	38.5	42.2	20.8	20.2	14.8	22.1
Total trips (000's)	97.3	122.0	127.8	228.4	243.9	210.0	176.3	208.9	180.9	122.6	167.1	238.7

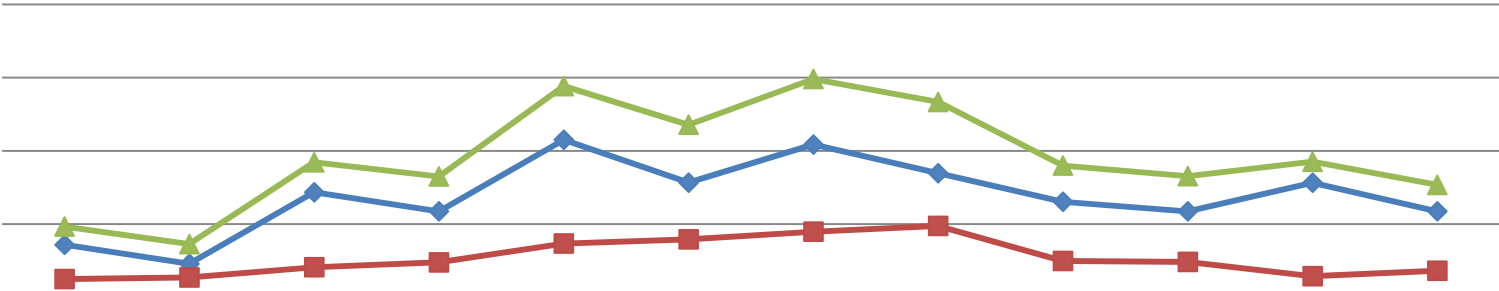
Seasonality - nights



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK nights (000's)	201.5	195.2	289.6	597.0	690.1	426.8	483.5	469.4	347.0	236.0	284.5	386.5
OS nights (000's)	73.9	92.0	152.6	137.0	230.7	227.5	301.9	342.4	141.3	126.7	69.3	118.6
Total nights (000's)	275.5	287.2	442.2	733.9	920.8	654.3	785.4	811.9	488.3	362.7	353.8	505.1

Gloucestershire - Estimated seasonality of staying visits

Seasonality - spend



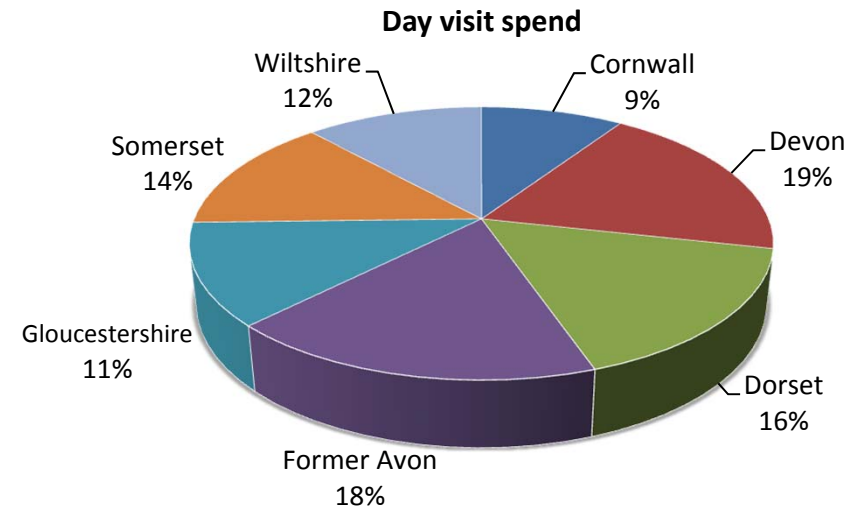
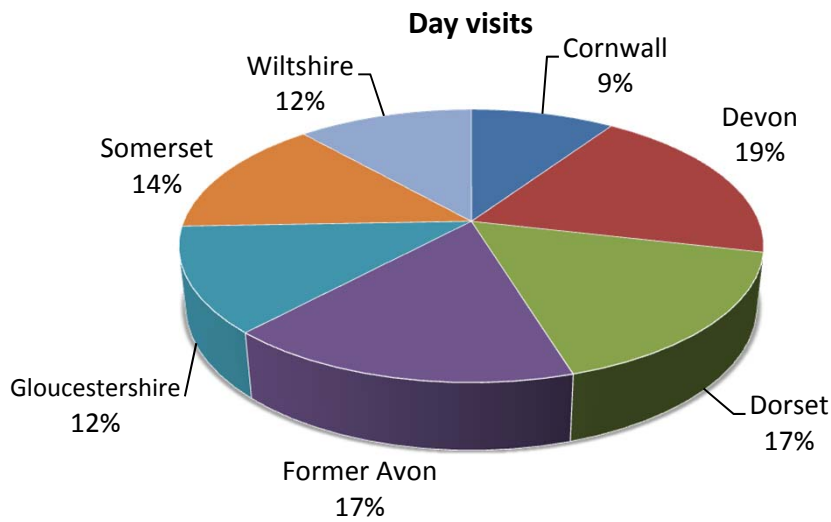
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK spend (mn's)	14.3	9.1	28.7	23.5	43.0	31.3	41.7	33.9	26.1	23.5	31.3	23.5
OS spend (mn's)	5.0	5.4	8.2	9.5	14.7	15.8	17.9	19.5	9.9	9.6	5.7	7.2
Total spend (mn's)	19.3	14.5	36.9	33.0	57.7	47.1	59.6	53.4	36.0	33.1	37.0	30.7

Gloucestershire – Day visits

Information on day visits within this report has been derived from the 2018 Great Britain Day Visit Survey (GBDVS). The survey, which was first undertaken in 2011, provides a much needed update on day visit activity in Great Britain and generally speaking estimated greater frequencies of trip taking than the previous day visit survey (England Leisure Visits Survey 2005). As a result of the new methodology in 2011 comparisons with previous day visit estimates are not possible.

The GBDVS distinguishes between day visits to a town or city; to the seaside and coast; and to the countryside. Different drivers are used within the model to distribute these trips. Local 'drivers' such as attraction footfall, quality and size of countryside and coastline are factored into the model for this purpose.

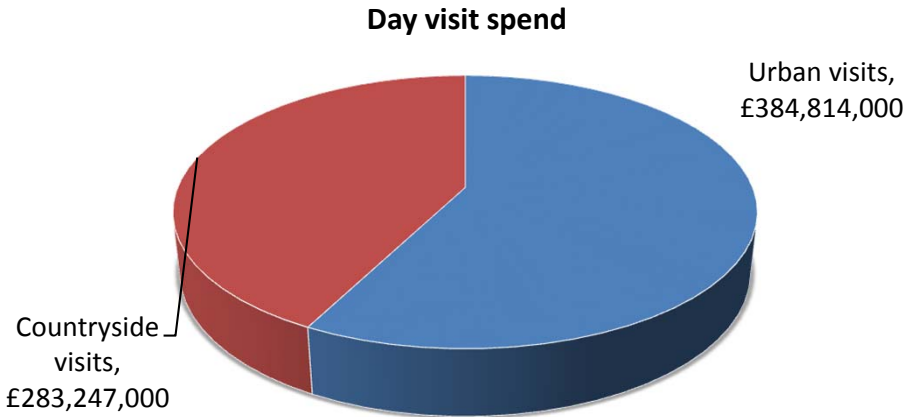
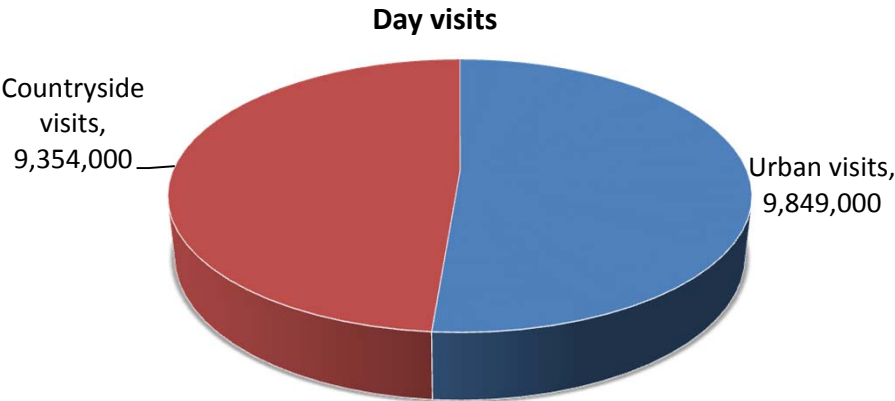
Gloucestershire - Day visits in the regional context



Area	Day visits (millions)	Day visit spend (millions)
Cornwall	14.5	£518.1
Devon	29.5	£1,055.4
Dorset	25.6	£896.9
Former Avon	25.6	£983.9
Gloucestershire	19.2	£668.1
Somerset	21.6	£758.7
Wiltshire	17.7	£646.1

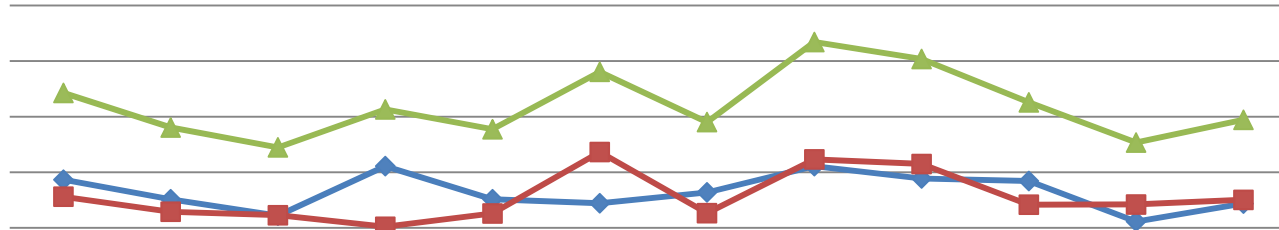
Gloucestershire - Day visits by location

Total day visits	Total day visit spend
19,203,000	£668,061,000



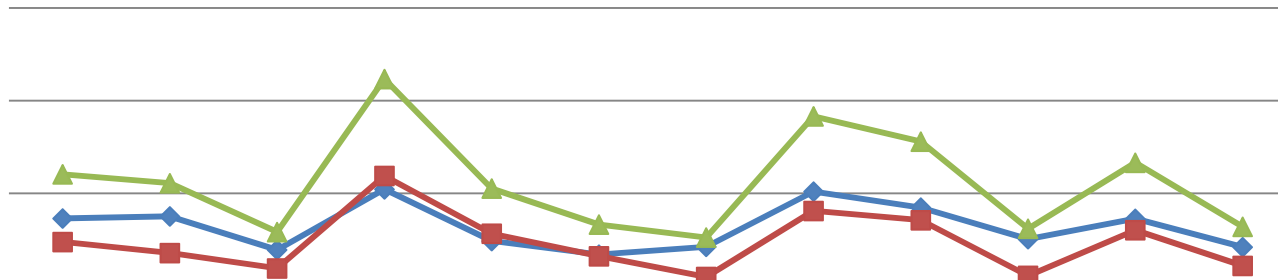
Gloucestershire - Estimated seasonality of day visits

Seasonality - day visits (000's)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban(000's)	933.2	757.4	610.0	1055.0	757.3	720.9	818.8	1055.1	944.2	920.9	556.9	719.2
Rural (000's)	780.4	645.2	613.7	510.1	629.8	1181.7	632.3	1115.8	1074.3	708.0	710.3	752.3
Total (000's)	1713.7	1402.5	1223.8	1565.1	1387.1	1902.6	1451.1	2170.9	2018.6	1628.9	1267.2	1471.5

Seasonality - day visit spend (millions)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban (mn)	36.5	37.6	19.6	52.3	24.4	17.0	21.2	51.0	42.4	25.4	36.4	21.1
Rural (mn)	23.9	17.9	9.6	59.5	28.3	16.2	5.0	40.6	35.6	5.6	30.2	11.0
Total (mn)	60.4	55.5	29.2	111.7	52.7	33.2	26.2	91.6	78.0	31.0	66.6	32.1

Gloucestershire - 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:

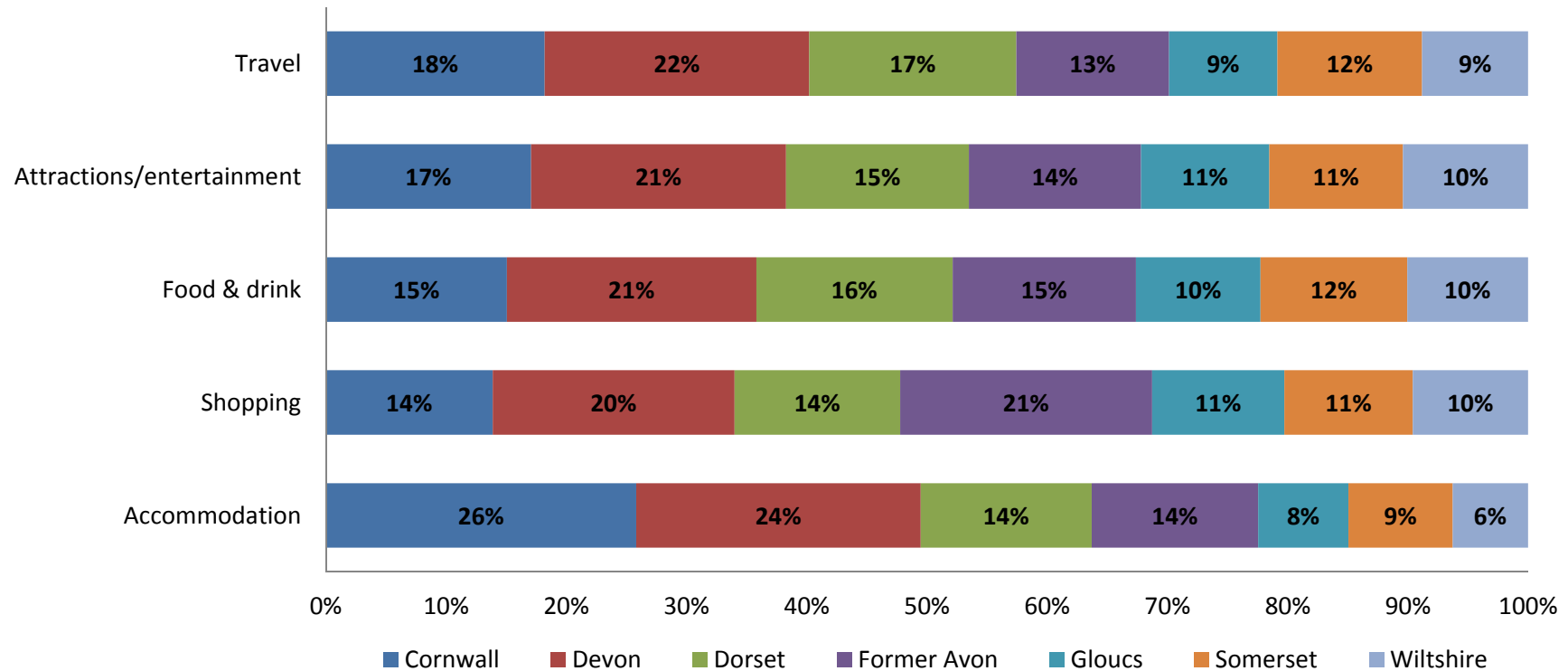
- Accommodation
- Shopping for gifts, clothes and other goods
- Eating and drinking in restaurants, cafes and inns
- Entry to attractions, entertainment and hire of goods and services
- Transport and travel costs including public transport, purchase of fuel and parking

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.

Gloucestershire – Direct visitor expenditure by category in the regional context

South West	Accommodation	Shopping	Food & drink	Attractions/entertainment	Travel	TOTAL
Spend	£2,129,854,000	£2,723,502,000	£3,635,435,000	£1,286,057,000	£1,696,640,000	£11,471,486,000
%	19%	24%	32%	11%	15%	100%



Gloucestershire – Direct visitor expenditure by category



Accommodation

- UK staying visitors £123,762,000
- Overseas staying visitors £36,144,000



Shopping

- UK staying visitors £40,164,000
- Overseas staying visitors £36,320,000
- Day visitors £223,082,000



Food & drink

- UK staying visitors £73,936,000
- Overseas staying visitors £28,011,000
- Day visitors £274,528,000



Attractions/entertainment

- UK staying visitors £33,917,000
- Overseas staying visitors £15,383,000
- Day visitors £88,011,000



Travel

- UK staying visitors £58,096,000
- Overseas staying visitors £12,559,000
- Day visitors £82,440,000

Gloucestershire – Other visitor related expenditure by category



Second Homes

£1,934,000



Boats

£1,086,000



Visiting friends and relatives (non-visitor spend)

£31,900,000

- 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.

Gloucestershire – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£161,945,000	£5,491,000	£167,436,000
Retailing	£75,719,000	£220,852,000	£296,571,000
Catering	£98,888,000	£266,292,000	£365,180,000
Attractions/entertainment	£51,084,000	£92,987,000	£144,071,000
Transport	£42,393,000	£49,464,000	£91,857,000
Arising from non trip spend	£34,920,000	£0	£34,920,000
Total Direct	£464,949,000	£635,086,000	£1,100,035,000

*Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£464,949,000	£635,086,000	£1,100,035,000
Supplier and income induced	£245,171,000	£269,010,000	£514,181,000
Total	£710,120,000	£904,096,000	£1,614,216,000

Gloucestershire – 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.

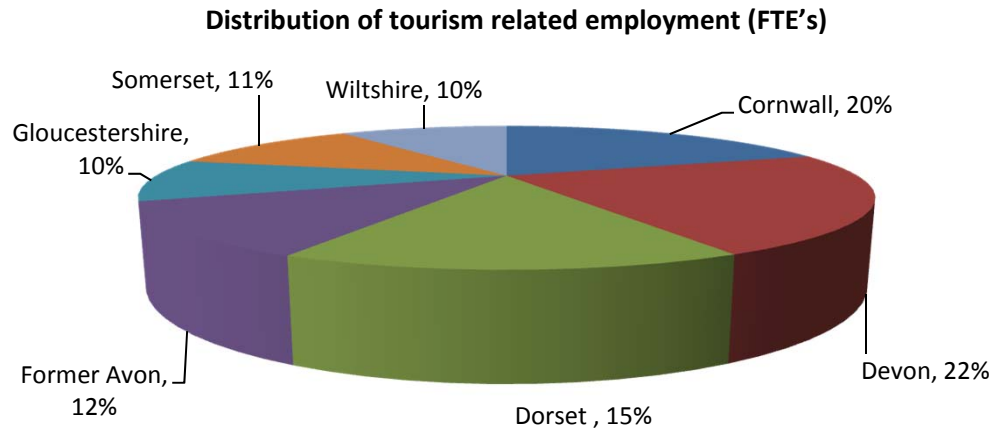
The use of visitor expenditure to generate job numbers underestimates the number of jobs arising in the attractions/entertainment sector. The underestimate arises because local authorities and voluntary bodies do not always seek to recoup the full operating costs of individual attractions or facilities 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;

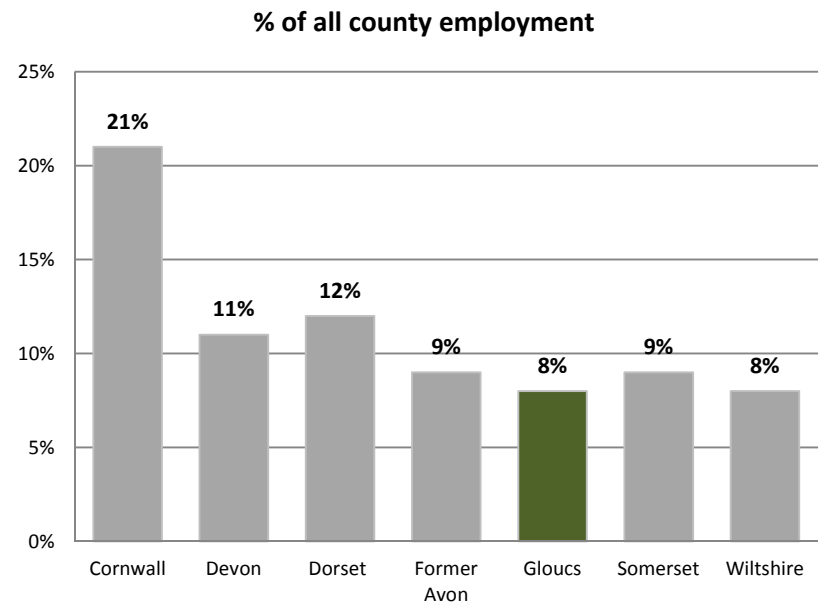
- **Direct Jobs** - Direct jobs are those in businesses in receipt of visitor spending. For example, jobs supported by visitor spending at a hotel would be direct jobs.
- **Indirect Jobs** - Indirect employment arises as a result of expenditure by businesses in direct receipt of visitor expenditure on 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).

Gloucestershire – Tourism related employment in the regional context



Area	Number of FTE's
Cornwall	41,670
Devon	47,317
Dorset	32,361
Former Avon	24,906
Gloucestershire	20,054
Somerset	23,845
Wiltshire	20,927



Gloucestershire – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)



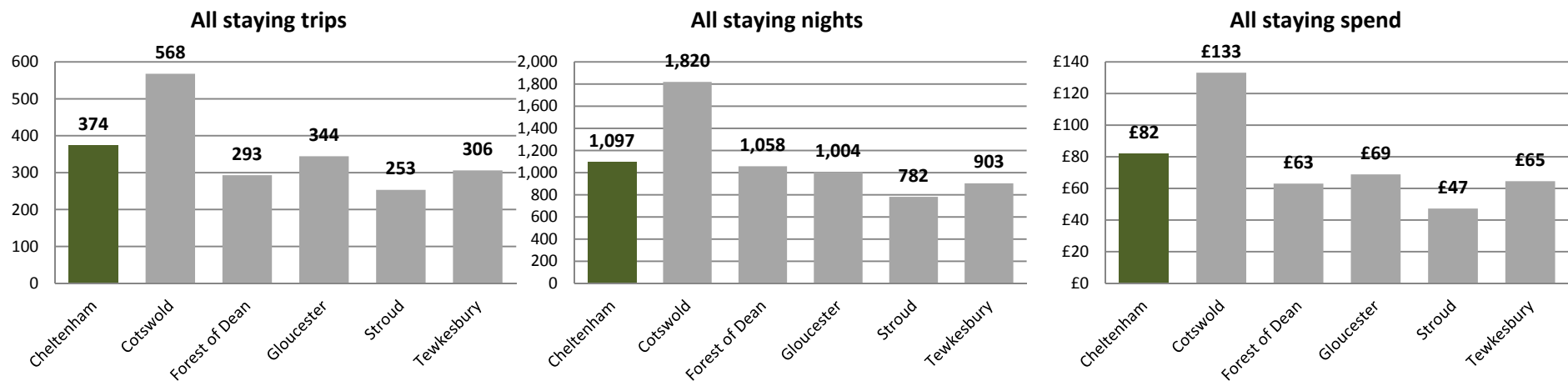
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	1,975	67	2,042
Retailing	562	1,639	2,201
Catering	1,216	3,274	4,490
Attractions/entertainment	744	1,354	2,098
Transport	234	273	507
Arising from non trip spend	554	0	554
Total Direct	5,285	6,608	11,893

Value of Tourism 2018

Cheltenham

Key Facts	
373,600	Staying visitor trips
1,097,000	Staying visitor nights
£82,046,000	Staying visitor spend
1,930,000	Day visits
£74,612,000	Day visitor spend
£156,658,000	Direct visitor spend
£6,015,000	Other related spend
£162,673,000	TOTAL VISITOR RELATED SPEND
£209,427,000	TOTAL BUSINESS TURNOVER SUPPORTED
3,397	Estimated actual employment
2,519	FTE employment
5%	Proportion of all employment

Cheltenham - 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	321	53	751	346	£59	£23
Cotswold	503	65	1,330	490	£100	£33
Forest of Dean	256	37	699	359	£42	£21
Gloucester	294	50	672	332	£49	£19
Stroud	218	35	531	251	£33	£14
Tewkesbury	266	40	648	255	£47	£17

Cheltenham - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	141,800	269,000	£33,085,000
Self catering	50,100	158,000	£13,858,000
Touring caravans /tents	10,900	39,000	£1,517,000
Static vans/holiday centres	0	0	£0
Group/campus	1,000	2,000	£93,000
Paying guest in private homes	0	0	£0
Second homes	1,300	5,000	£113,000
Boat moorings	0	0	£0
Other	3,400	14,000	£664,000
Staying with friends and relatives	112,600	264,000	£9,457,000
Total	321,100	751,000	£58,786,000

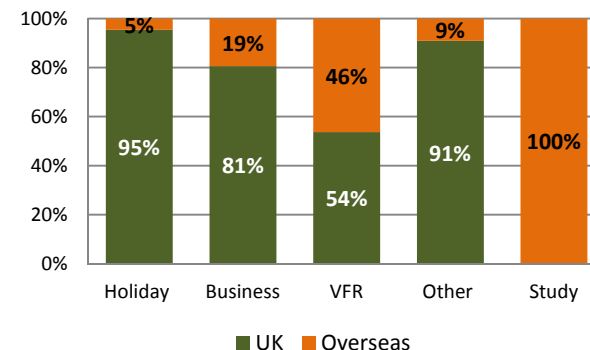
Overseas tourists	Trips	Nights	Spend
Serviced	25,300	87,000	£11,107,000
Self catering	2,200	35,000	£1,729,000
Touring caravans /tents	800	3,000	£169,000
Static vans/holiday centres	0	0	£0
Group/campus	400	8,000	£497,000
Paying guest in private homes	1,600	25,000	£1,328,000
Second homes	100	2,000	£103,000
Boat moorings	0	0	£0
Other	3,900	12,000	£774,000
Staying with friends and relatives	18,100	174,000	£7,553,000
Total	52,500	346,000	£23,260,000

Cheltenham - Staying visits by purpose

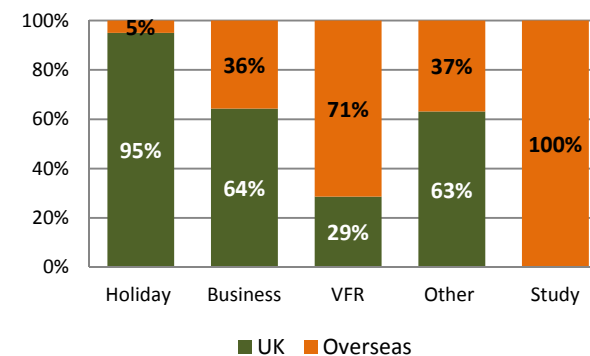
Domestic tourists	Trips	Nights	Spend
Holiday	228,000	555,000	£41,683,000
Business	54,000	108,000	£11,644,000
Visits to friends and relatives	29,000	53,000	£3,581,000
Other	10,000	36,000	£1,877,000
Study	0	0	£0
Total	321,000	751,000	£58,786,000

Overseas tourists	Trips	Nights	Spend
Holiday	11,000	29,000	£3,689,000
Business	13,000	60,000	£5,022,000
Visits to friends and relatives	25,000	132,000	£8,337,000
Other	1,000	21,000	£1,232,000
Study	2,000	103,000	£4,981,000
Total	52,000	346,000	£23,260,000

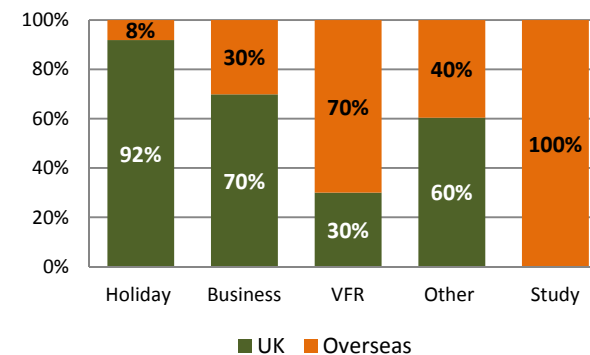
Trips



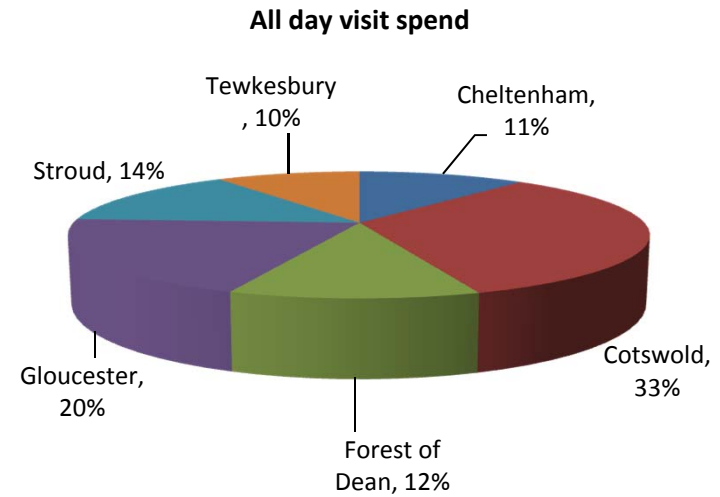
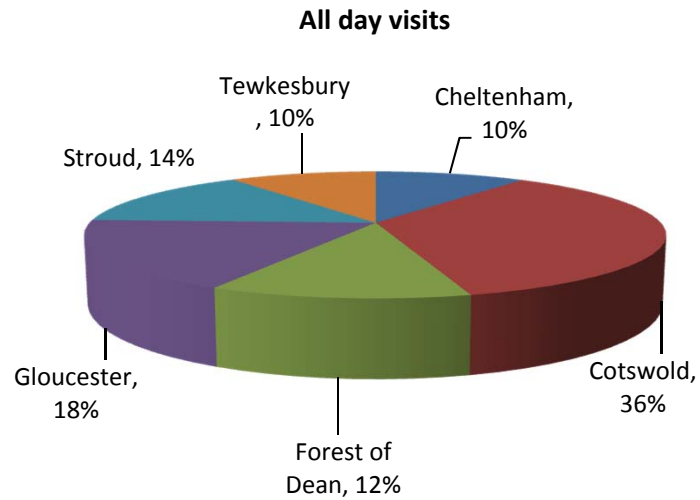
Nights



Spend



Cheltenham - Day visits in the county context

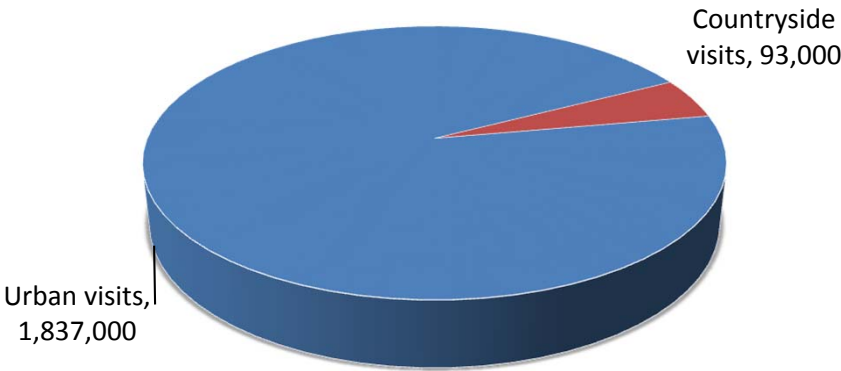


Area	Day visits	Day visit spend
Cheltenham	1.9	£74.6
Cotswold	6.8	£222.3
Forest of Dean	2.3	£77.6
Gloucester	3.5	£133.0
Stroud	2.8	£96.3
Tewkesbury	1.9	£64.3

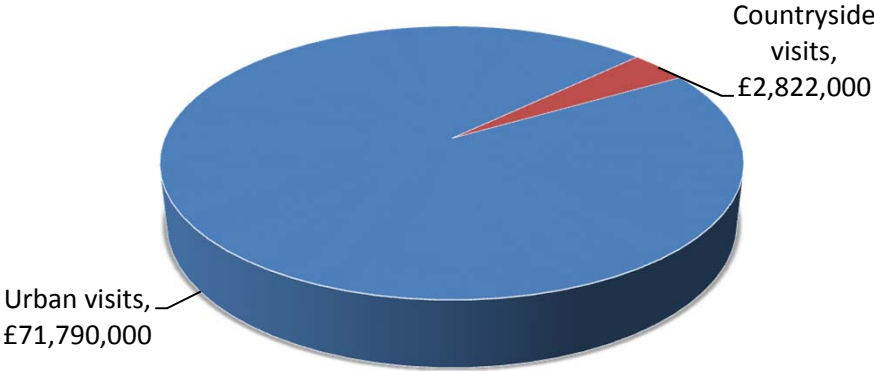
Cheltenham - Day visits by location

Total day visits	Total day visit spend
1,930,000	£74,612,000

Day visits



Day visit spend



Cheltenham – Direct visitor expenditure by category



Accommodation

- UK staying visitors £22,087,000
- Overseas staying visitors £6,594,000



Shopping

- UK staying visitors £7,012,000
- Overseas staying visitors £6,605,000
- Day visitors £32,114,000



Food & drink

- UK staying visitors £13,235,000
- Overseas staying visitors £4,834,000
- Day visitors £27,956,000



Attractions/entertainment

- UK staying visitors £5,886,000
- Overseas staying visitors £3,061,000
- Day visitors £7,416,000



Travel

- UK staying visitors £10,567,000
- Overseas staying visitors £2,166,000
- Day visitors £7,127,000

Cheltenham – Other visitor related expenditure by category



Second Homes
£68,000



Visiting friends and relatives (non-visitor spend)
£5,947,000

- 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.

Cheltenham – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£29,042,000	£559,000	£29,601,000
Retailing	£13,480,000	£31,793,000	£45,273,000
Catering	£17,527,000	£27,117,000	£44,644,000
Attractions/entertainment	£9,264,000	£8,016,000	£17,280,000
Transport	£7,640,000	£4,276,000	£11,916,000
Arising from non trip spend	£6,015,000	£0	£6,015,000
Total Direct	£82,968,000	£71,761,000	£154,729,000

*Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£82,968,000	£71,761,000	£154,729,000
Supplier and income induced	£33,696,000	£21,002,000	£54,698,000
Total	£116,664,000	£92,763,000	£209,427,000

Cheltenham – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)



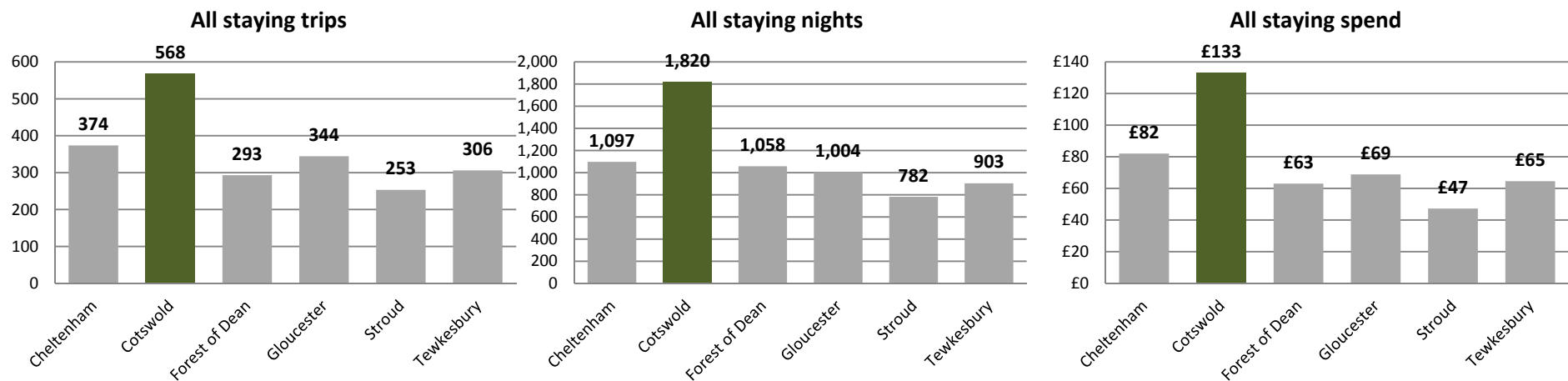
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	352	7	359
Retailing	100	235	334
Catering	214	332	546
Attractions/entertainment	134	116	250
Transport	42	23	65
Arising from non trip spend	95	0	95
Total Direct	938	713	1,651

Value of Tourism 2018

Cotswold

Key Facts	
568,000	Staying visitor trips
1,820,000	Staying visitor nights
£133,199,000	Staying visitor spend
6,832,000	Day visits
£222,274,000	Day visitor spend
£355,473,000	Direct visitor spend
£5,959,000	Other related spend
£361,432,000	TOTAL VISITOR RELATED SPEND
£411,581,000	TOTAL BUSINESS TURNOVER SUPPORTED
7,286	Estimated actual employment
5,221	FTE employment
18%	Proportion of all employment

Cotswold - 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	321	53	751	346	£59	£23
Cotswold	503	65	1,330	490	£100	£33
Forest of Dean	256	37	699	359	£42	£21
Gloucester	294	50	672	332	£49	£19
Stroud	218	35	531	251	£33	£14
Tewkesbury	266	40	648	255	£47	£17

Cotswold - Staying visits by accommodation type

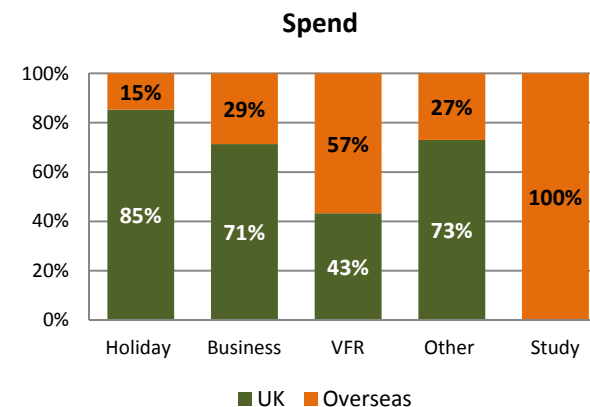
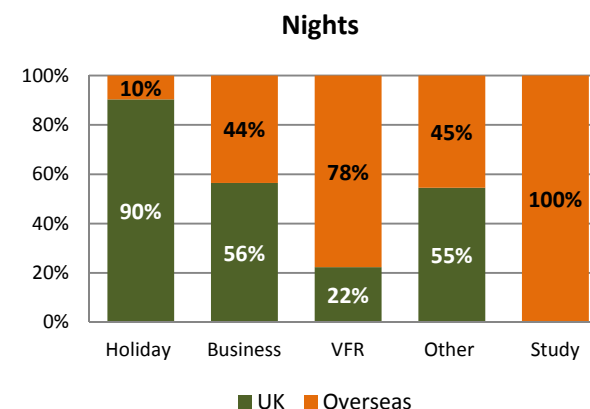
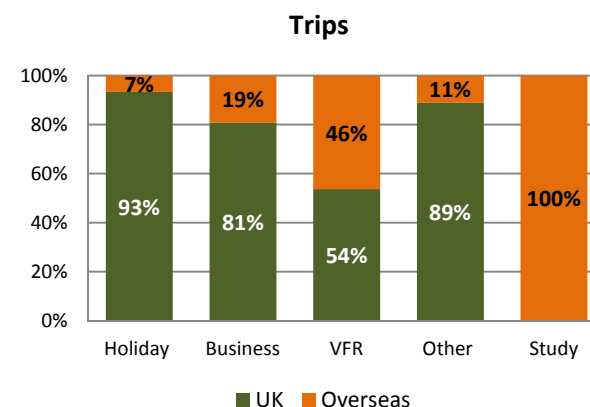
Domestic tourists	Trips	Nights	Spend
Serviced	175,400	333,000	£40,926,000
Self catering	143,800	454,000	£39,762,000
Touring caravans /tents	59,200	211,000	£8,238,000
Static vans/holiday centres	1,600	8,000	£386,000
Group/campus	8,200	17,000	£778,000
Paying guest in private homes	0	0	£0
Second homes	25,100	90,000	£2,174,000
Boat moorings	2,900	9,000	£671,000
Other	2,500	10,000	£496,000
Staying with friends and relatives	84,100	198,000	£7,066,000
Total	503,000	1,330,000	£100,498,000

Overseas tourists	Trips	Nights	Spend
Serviced	31,300	108,000	£13,740,000
Self catering	6,300	100,000	£4,961,000
Touring caravans /tents	4,300	18,000	£918,000
Static vans/holiday centres	0	0	£45,000
Group/campus	3,500	66,000	£4,176,000
Paying guest in private homes	800	13,000	£664,000
Second homes	2,700	46,000	£1,976,000
Boat moorings	0	0	£0
Other	2,900	9,000	£578,000
Staying with friends and relatives	13,500	130,000	£5,644,000
Total	65,000	490,000	£32,701,000

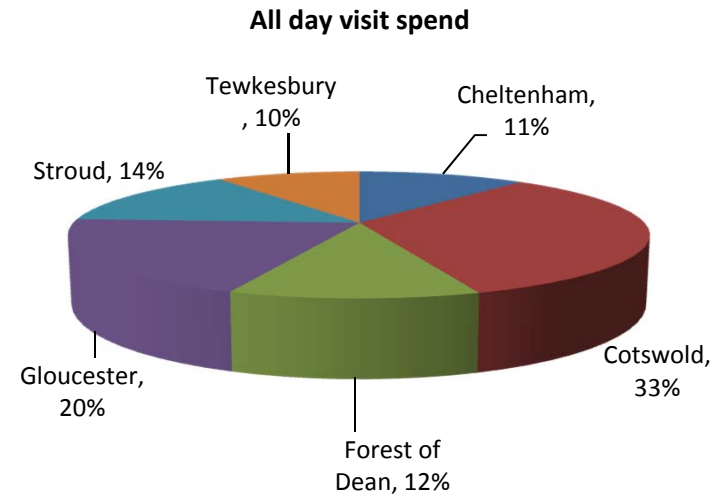
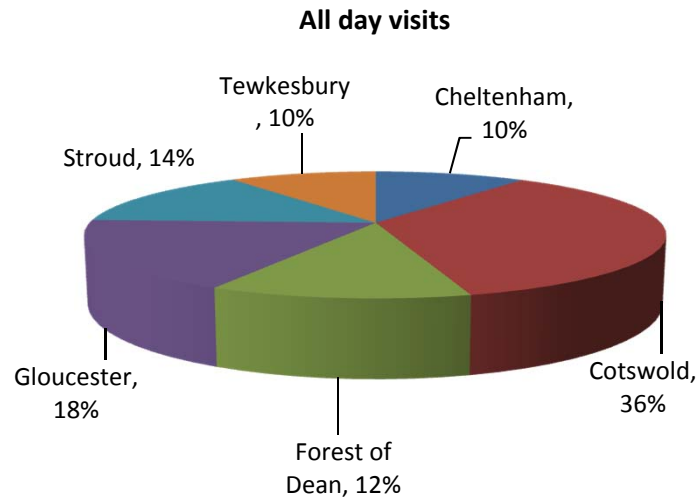
Cotswold - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	407,000	1,107,000	£71,260,000
Business	67,000	149,000	£19,906,000
Visits to friends and relatives	22,000	44,000	£6,122,000
Other	8,000	30,000	£3,210,000
Study	0	0	£0
Total	503,000	1,330,000	£100,498,000

Overseas tourists	Trips	Nights	Spend
Holiday	29,000	118,000	£12,291,000
Business	16,000	115,000	£7,999,000
Visits to friends and relatives	19,000	153,000	£8,021,000
Other	1,000	25,000	£1,185,000
Study	1,000	80,000	£3,206,000
Total	65,000	490,000	£32,701,000



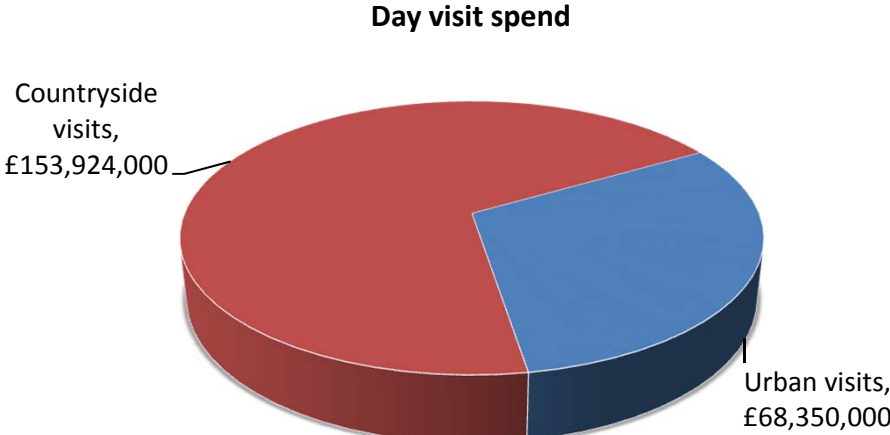
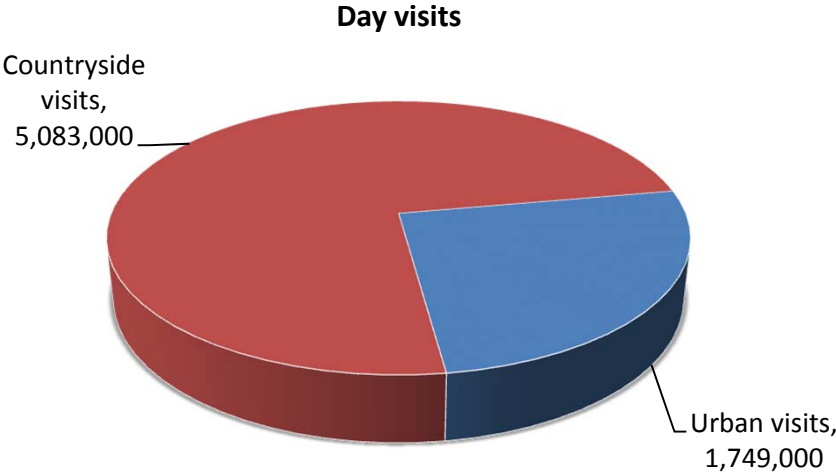
Cotswold - Day visits in the county context



Area	Day visits	Day visit spend
Cheltenham	1.9	£74.6
Cotswold	6.8	£222.3
Forest of Dean	2.3	£77.6
Gloucester	3.5	£133.0
Stroud	2.8	£96.3
Tewkesbury	1.9	£64.3

Cotswold - Day visits by location

Total day visits	Total day visit spend
6,832,000	£222,274,000



Cotswold – Direct visitor expenditure by category



Accommodation

- UK staying visitors £37,758,000
- Overseas staying visitors £10,340,000



Shopping

- UK staying visitors £11,987,000
- Overseas staying visitors £8,740,000
- Day visitors £59,310,000



Food & drink

- UK staying visitors £22,626,000
- Overseas staying visitors £7,032,000
- Day visitors £96,942,000



Attractions/entertainment

- UK staying visitors £10,062,000
- Overseas staying visitors £3,442,000
- Day visitors £34,283,000



Travel

- UK staying visitors £18,065,000
- Overseas staying visitors £3,148,000
- Day visitors £31,739,000

Cotswold – Other visitor related expenditure by category



Second Homes

£1,315,000



Boats

£200,000



Visiting friends and relatives (non-visitor spend)

£4,444,000

- 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.

Cotswold – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£48,692,000	£1,939,000	£50,631,000
Retailing	£20,519,000	£58,717,000	£79,236,000
Catering	£28,768,000	£94,033,000	£122,801,000
Attractions/entertainment	£14,007,000	£35,845,000	£49,852,000
Transport	£12,728,000	£19,044,000	£31,772,000
Arising from non trip spend	£5,959,000	£0	£5,959,000
Total Direct	£130,673,000	£209,578,000	£340,251,000

*Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£130,673,000	£209,578,000	£340,251,000
Supplier and income induced	£32,061,000	£39,269,000	£71,330,000
Total	£162,734,000	£248,847,000	£411,581,000

Cotswold – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)



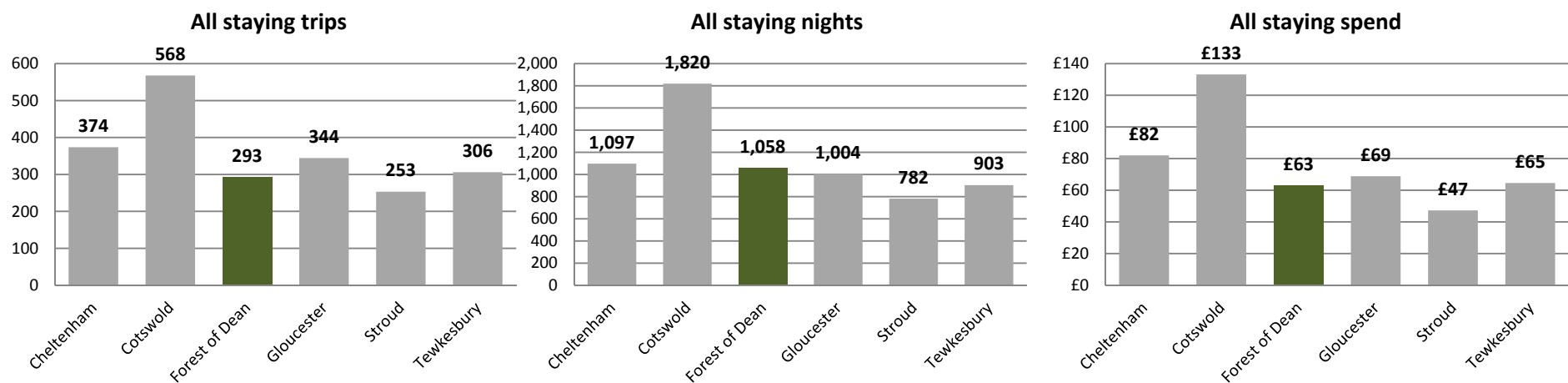
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	656	26	682
Retailing	168	481	649
Catering	391	1,277	1,667
Attractions/entertainment	225	576	802
Transport	78	116	194
Arising from non trip spend	95	0	95
Total Direct	1,612	2,477	4,089

Value of Tourism 2018

Forest of Dean

Key Facts	
293,000	Staying visitor trips
1,058,000	Staying visitor nights
£63,066,000	Staying visitor spend
2,326,000	Day visits
£77,579,000	Day visitor spend
£140,645,000	Direct visitor spend
£4,534,000	Other related spend
£145,179,000	TOTAL VISITOR RELATED SPEND
£166,392,000	TOTAL BUSINESS TURNOVER SUPPORTED
3,165	Estimated actual employment
2,268	FTE employment
7%	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	321	53	751	346	£59	£23
Cotswold	503	65	1,330	490	£100	£33
Forest of Dean	256	37	699	359	£42	£21
Gloucester	294	50	672	332	£49	£19
Stroud	218	35	531	251	£33	£14
Tewkesbury	266	40	648	255	£47	£17

Forest of Dean - Staying visits by accommodation type

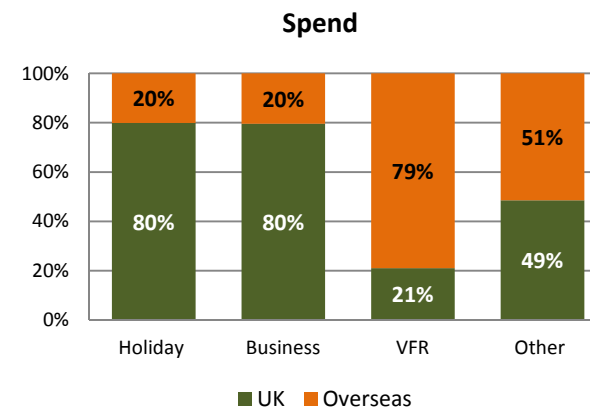
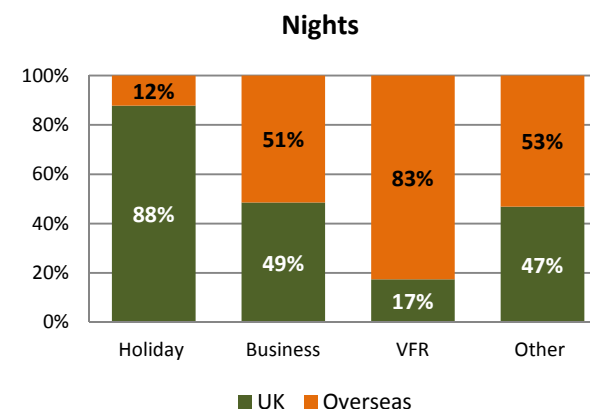
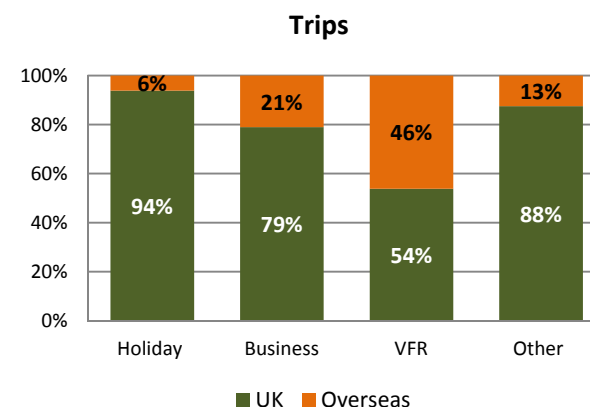
Domestic tourists	Trips	Nights	Spend
Serviced	38,500	73,000	£8,976,000
Self catering	60,600	191,000	£16,756,000
Touring caravans /tents	51,900	185,000	£7,224,000
Static vans/holiday centres	0	0	£0
Group/campus	16,800	34,000	£1,591,000
Paying guest in private homes	0	0	£0
Second homes	3,200	11,000	£274,000
Boat moorings	0	0	£0
Other	2,500	10,000	£487,000
Staying with friends and relatives	82,700	194,000	£6,945,000
Total	256,000	699,000	£42,254,000

Overseas tourists	Trips	Nights	Spend
Serviced	6,900	24,000	£3,013,000
Self catering	2,700	42,000	£2,091,000
Touring caravans /tents	3,800	16,000	£805,000
Static vans/holiday centres	0	0	£0
Group/campus	7,100	135,000	£8,538,000
Paying guest in private homes	0	0	£0
Second homes	300	6,000	£249,000
Boat moorings	0	0	£0
Other	2,900	9,000	£568,000
Staying with friends and relatives	13,300	127,000	£5,547,000
Total	37,000	359,000	£20,812,000

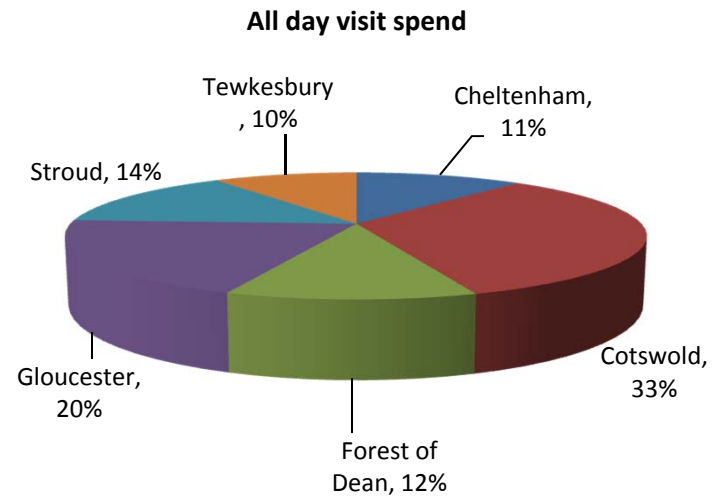
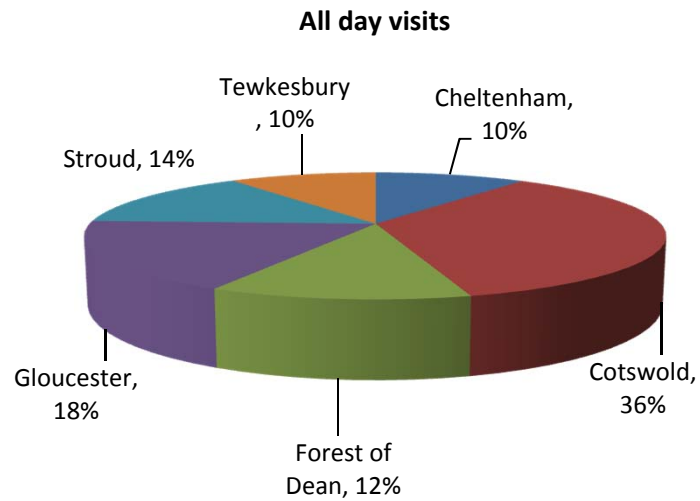
Forest of Dean - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	213,000	592,000	£29,961,000
Business	15,000	33,000	£8,369,000
Visits to friends and relatives	21,000	44,000	£2,574,000
Other	7,000	30,000	£1,349,000
Study	0	0	£0
Total	256,000	699,000	£42,254,000

Overseas tourists	Trips	Nights	Spend
Holiday	14,000	82,000	£7,554,000
Business	4,000	35,000	£2,153,000
Visits to friends and relatives	18,000	209,000	£9,675,000
Other	1,000	34,000	£1,430,000
Study	0	0	£0
Total	37,000	359,000	£20,812,000



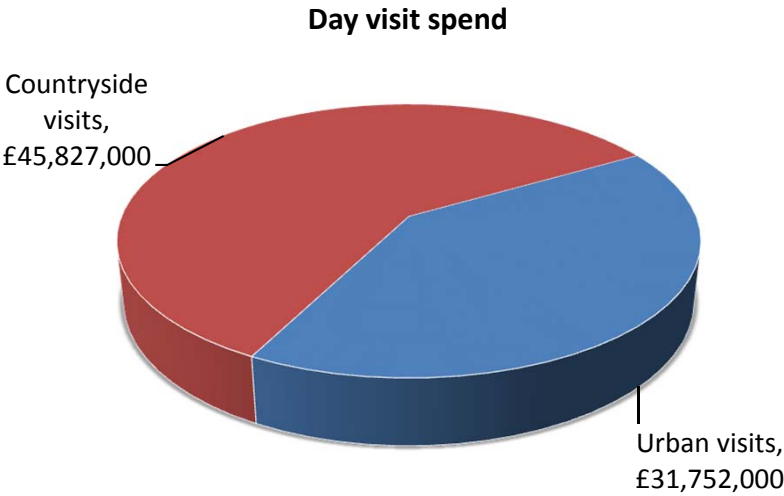
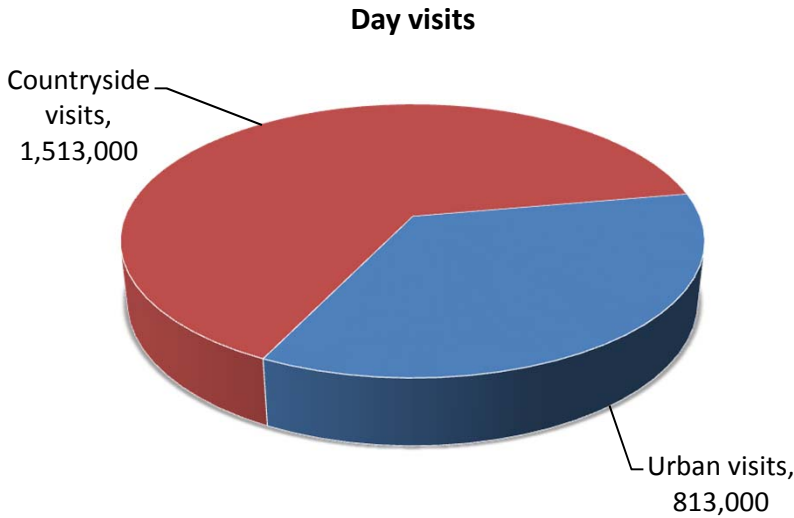
Forest of Dean - Day visits in the county context



Area	Day visits	Day visit spend
Cheltenham	1.9	£74.6
Cotswold	6.8	£222.3
Forest of Dean	2.3	£77.6
Gloucester	3.5	£133.0
Stroud	2.8	£96.3
Tewkesbury	1.9	£64.3

Forest of Dean - Day visits by location

Total day visits	Total day visit spend
2,326,000	£77,579,000



Forest of Dean – Direct visitor expenditure by category



Accommodation

- UK staying visitors £15,875,000
- Overseas staying visitors £5,539,000



Shopping

- UK staying visitors £5,040,000
- Overseas staying visitors £6,094,000
- Day visitors £22,674,000



Food & drink

- UK staying visitors £9,513,000
- Overseas staying visitors £4,828,000
- Day visitors £33,094,000



Attractions/entertainment

- UK staying visitors £4,230,000
- Overseas staying visitors £2,210,000
- Day visitors £11,304,000



Travel

- UK staying visitors £7,596,000
- Overseas staying visitors £2,141,000
- Day visitors £10,508,000

Forest of Dean – Other visitor related expenditure by category



Second Homes
£166,000



Visiting friends and relatives (non-visitor spend)
£4,368,000

- 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 – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£21,701,000	£662,000	£22,363,000
Retailing	£11,022,000	£22,447,000	£33,469,000
Catering	£13,911,000	£32,101,000	£46,012,000
Attractions/entertainment	£6,695,000	£11,862,000	£18,557,000
Transport	£5,842,000	£6,305,000	£12,147,000
Arising from non trip spend	£4,534,000	£0	£4,534,000
Total Direct	£63,705,000	£73,377,000	£137,082,000

*Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£63,705,000	£73,377,000	£137,082,000
Supplier and income induced	£15,552,000	£13,758,000	£29,310,000
Total	£79,257,000	£87,135,000	£166,392,000

Forest of Dean – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)



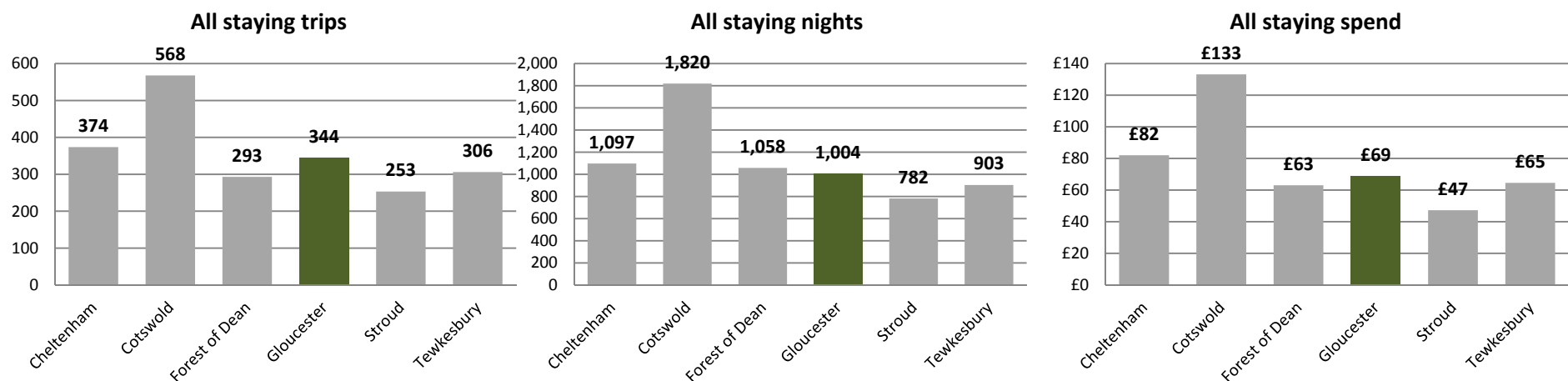
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	322	10	331
Retailing	99	202	302
Catering	208	480	687
Attractions/entertainment	118	210	328
Transport	39	42	81
Arising from non trip spend	72	0	72
Total Direct	858	944	1,803

Value of Tourism 2018

Gloucester

Key Facts	
344,400	Staying visitor trips
1,004,000	Staying visitor nights
£72,526,000	Staying visitor spend
3,456,000	Day visits
£132,981,000	Day visitor spend
£205,507,000	Direct visitor spend
£6,690,000	Other related spend
£212,197,000	TOTAL VISITOR RELATED SPEND
£270,472,000	TOTAL BUSINESS TURNOVER SUPPORTED
4,373	Estimated actual employment
3,229	FTE employment
6%	Proportion of all employment

Gloucester - 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	321	53	751	346	£59	£23
Cotswold	503	65	1,330	490	£100	£33
Forest of Dean	256	37	699	359	£42	£21
Gloucester	294	50	672	332	£49	£19
Stroud	218	35	531	251	£33	£14
Tewkesbury	266	40	648	255	£47	£17

Gloucester - Staying visits by accommodation type

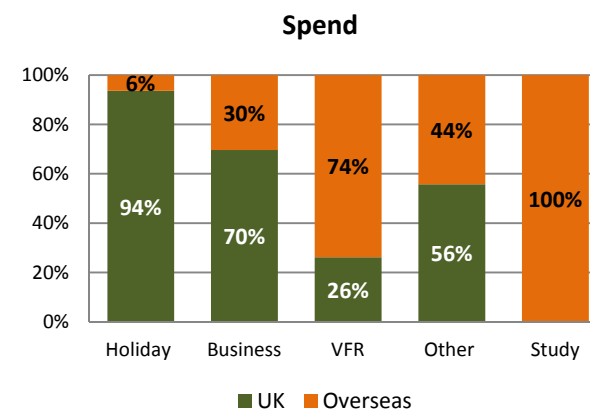
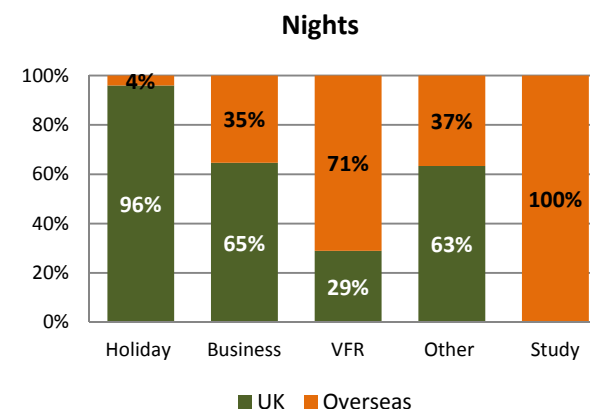
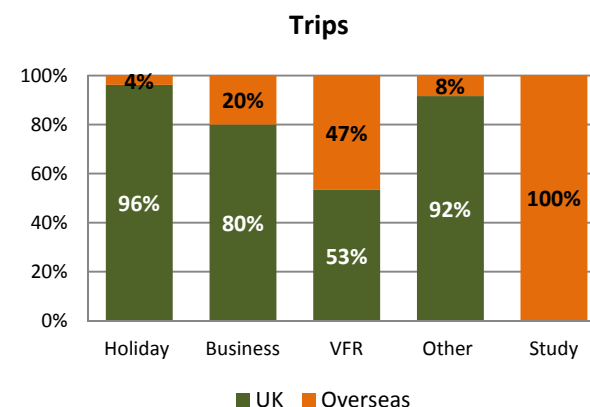
Domestic tourists	Trips	Nights	Spend
Serviced	127,500	242,000	£29,754,000
Self catering	32,100	101,000	£8,876,000
Touring caravans /tents	4,500	16,000	£622,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	400	2,000	£38,000
Boat moorings	1,600	5,000	£369,000
Other	3,700	15,000	£732,000
Staying with friends and relatives	124,100	291,000	£10,426,000
Total	294,000	672,000	£50,817,000

Overseas tourists	Trips	Nights	Spend
Serviced	22,800	78,000	£9,989,000
Self catering	1,400	22,000	£1,107,000
Touring caravans /tents	300	1,000	£69,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	1,600	25,000	£1,328,000
Second homes	0	1,000	£35,000
Boat moorings	0	0	£0
Other	4,300	13,000	£853,000
Staying with friends and relatives	19,900	191,000	£8,327,000
Total	50,400	332,000	£21,709,000

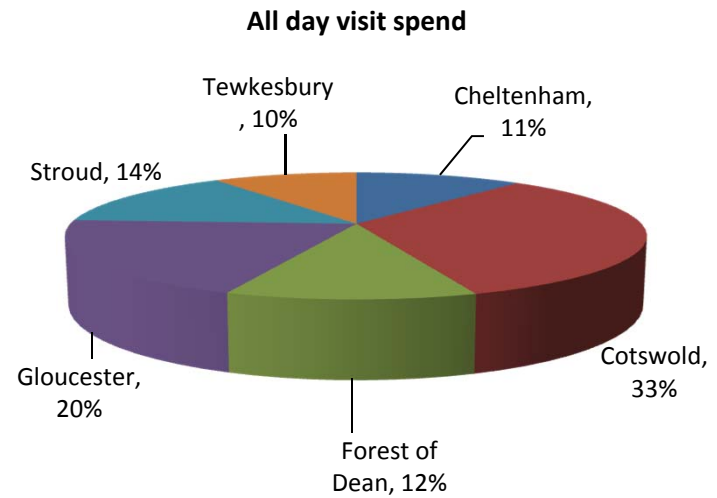
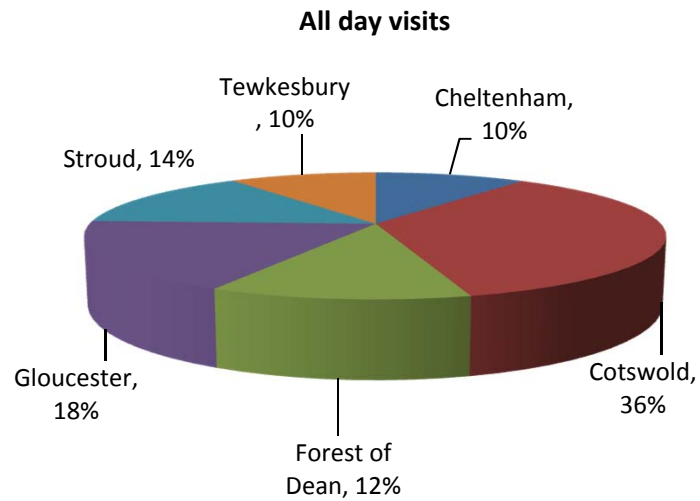
Gloucester - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	202,000	482,000	£36,106,000
Business	48,000	95,000	£9,941,000
Visits to friends and relatives	32,000	57,000	£3,130,000
Other	11,000	38,000	£1,641,000
Study	0	0	£0
Total	294,000	672,000	£50,817,000

Overseas tourists	Trips	Nights	Spend
Holiday	8,000	20,000	£2,454,000
Business	12,000	52,000	£4,338,000
Visits to friends and relatives	28,000	140,000	£8,828,000
Other	1,000	22,000	£1,304,000
Study	2,000	99,000	£4,784,000
Total	50,000	332,000	£21,709,000



Gloucester - Day visits in the county context

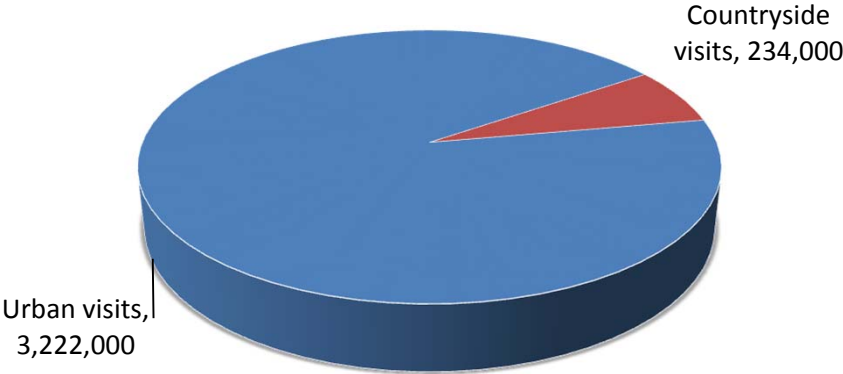


Area	Day visits	Day visit spend
Cheltenham	1.9	£74.6
Cotswold	6.8	£222.3
Forest of Dean	2.3	£77.6
Gloucester	3.5	£133.0
Stroud	2.8	£96.3
Tewkesbury	1.9	£64.3

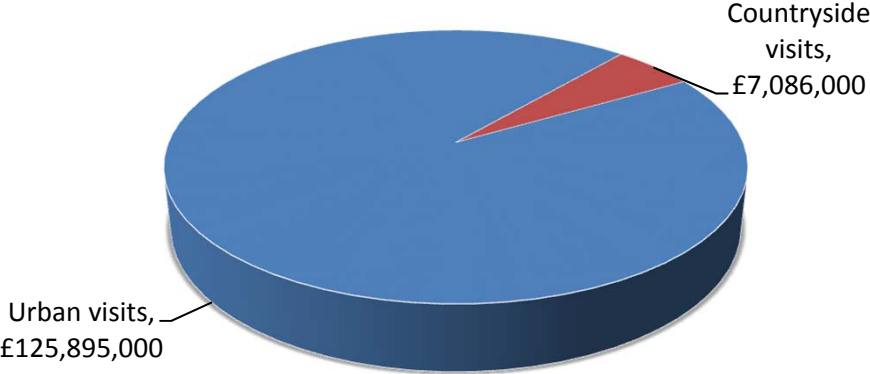
Gloucester - Day visits by location

Total day visits	Total day visit spend
3,456,000	£132,981,000

Day visits



Day visit spend



Gloucester – Direct visitor expenditure by category



Accommodation

- UK staying visitors £19,079,000
- Overseas staying visitors £5,911,000



Shopping

- UK staying visitors £6,069,000
- Overseas staying visitors £6,279,000
- Day visitors £56,723,000



Food & drink

- UK staying visitors £11,442,000
- Overseas staying visitors £4,530,000
- Day visitors £50,019,000



Attractions/entertainment

- UK staying visitors £5,097,000
- Overseas staying visitors £2,958,000
- Day visitors £13,389,000



Travel

- UK staying visitors £9,129,000
- Overseas staying visitors £2,030,000
- Day visitors £12,850,000

Gloucester – Other visitor related expenditure by category



Second Homes

£23,000



Boats

£110,000



Visiting friends and relatives (non-visitor spend)

£6,557,000

- 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.

Gloucester – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£25,310,000	£1,000,000	£26,310,000
Retailing	£12,225,000	£56,156,000	£68,381,000
Catering	£15,493,000	£48,518,000	£64,011,000
Attractions/entertainment	£8,339,000	£14,456,000	£22,795,000
Transport	£6,696,000	£7,710,000	£14,406,000
Arising from non trip spend	£6,690,000	£0	£6,690,000
Total Direct	£74,753,000	£127,840,000	£202,593,000

*Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£74,753,000	£127,840,000	£202,593,000
Supplier and income induced	£30,238,000	£37,641,000	£67,879,000
Total	£104,991,000	£165,481,000	£270,472,000

Gloucester – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)



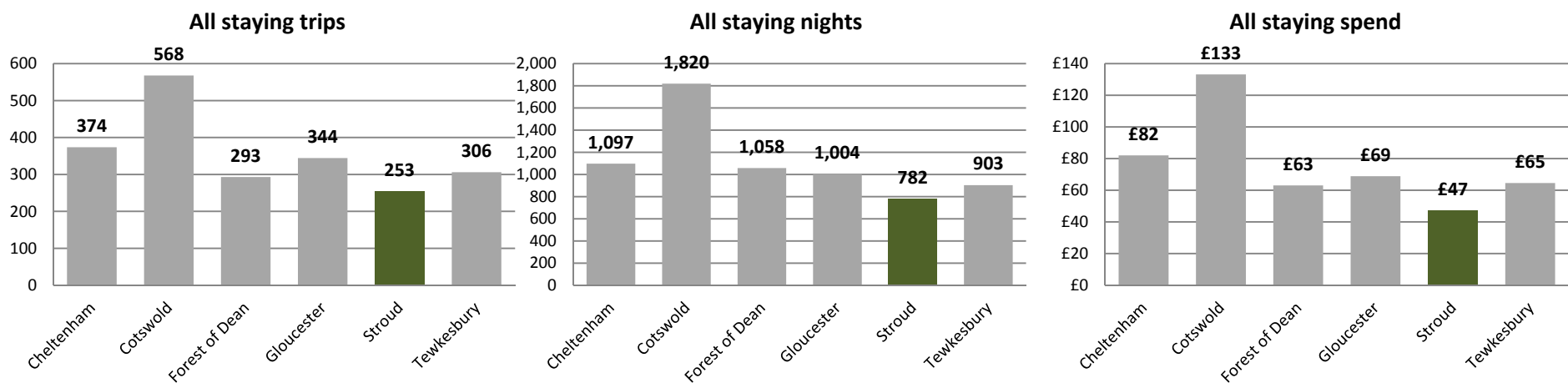
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	311	12	324
Retailing	92	421	512
Catering	192	602	794
Attractions/entertainment	123	212	335
Transport	37	43	80
Arising from non trip spend	106	0	106
Total Direct	861	1,290	2,151

Value of Tourism 2018

Stroud

Key Facts	
253,200	Staying visitor trips
782,000	Staying visitor nights
£47,291,000	Staying visitor spend
2,771,000	Day visits
£96,324,000	Day visitor spend
£143,615,000	Direct visitor spend
£5,872,000	Other related spend
£149,487,000	TOTAL VISITOR RELATED SPEND
£189,832,000	TOTAL BUSINESS TURNOVER SUPPORTED
3,013	Estimated actual employment
2,236	FTE employment
5%	Proportion of all employment

Stroud - 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	321	53	751	346	£59	£23
Cotswold	503	65	1,330	490	£100	£33
Forest of Dean	256	37	699	359	£42	£21
Gloucester	294	50	672	332	£49	£19
Stroud	218	35	531	251	£33	£14
Tewkesbury	272	40	655	225	£49	£16

Stroud - Staying visits by accommodation type

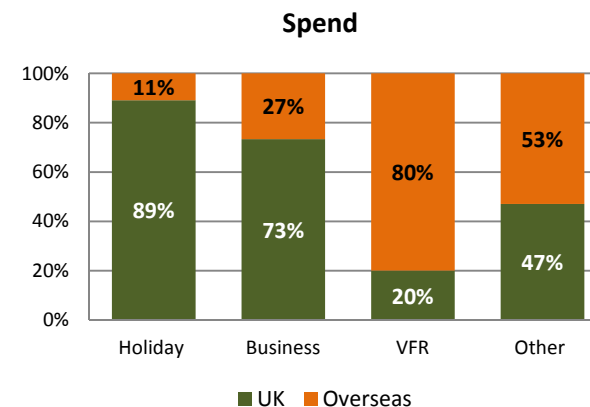
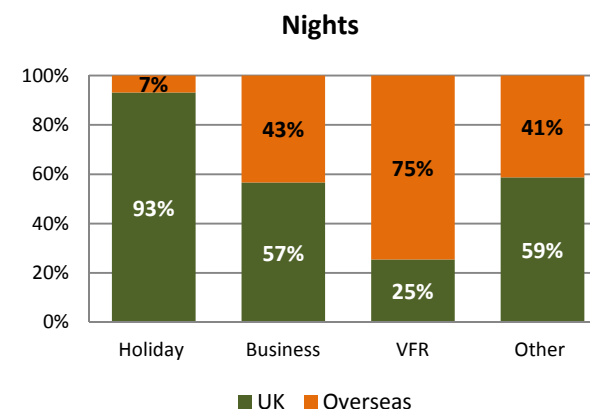
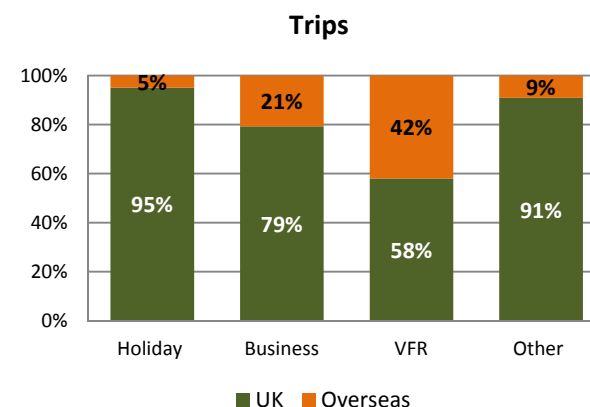
Domestic tourists	Trips	Nights	Spend
Serviced	59,600	113,000	£13,914,000
Self catering	22,900	72,000	£6,340,000
Touring caravans /tents	13,000	46,000	£1,809,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	4,300	15,000	£368,000
Boat moorings	1,100	3,000	£255,000
Other	3,400	14,000	£669,000
Staying with friends and relatives	113,600	267,000	£9,538,000
Total	217,900	531,000	£32,894,000

Overseas tourists	Trips	Nights	Spend
Serviced	10,700	37,000	£4,671,000
Self catering	1,000	16,000	£791,000
Touring caravans /tents	900	4,000	£202,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	500	8,000	£335,000
Boat moorings	0	0	£0
Other	3,900	12,000	£781,000
Staying with friends and relatives	18,200	175,000	£7,618,000
Total	35,300	251,000	£14,397,000

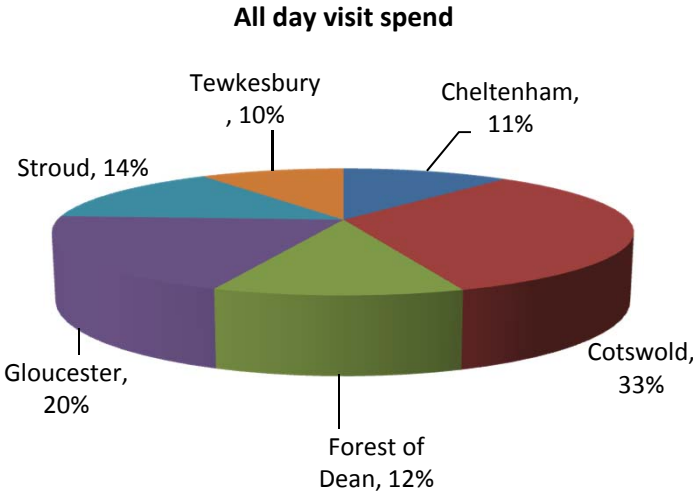
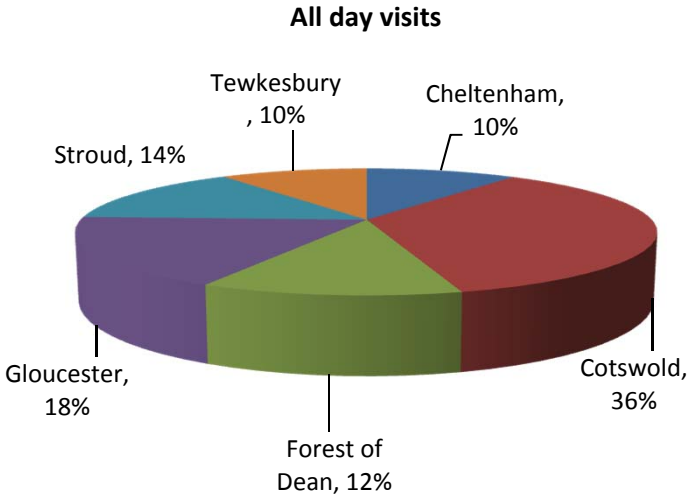
Stroud - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	156,000	392,000	£23,324,000
Business	23,000	47,000	£6,515,000
Visits to friends and relatives	29,000	55,000	£2,004,000
Other	10,000	37,000	£1,051,000
Study	0	0	£0
Total	218,000	531,000	£32,894,000

Overseas tourists	Trips	Nights	Spend
Holiday	8,000	29,000	£2,850,000
Business	6,000	36,000	£2,372,000
Visits to friends and relatives	21,000	161,000	£7,994,000
Other	1,000	26,000	£1,181,000
Study	0	0	£0
Total	35,000	251,000	£14,397,000



Stroud - Day visits in the county context

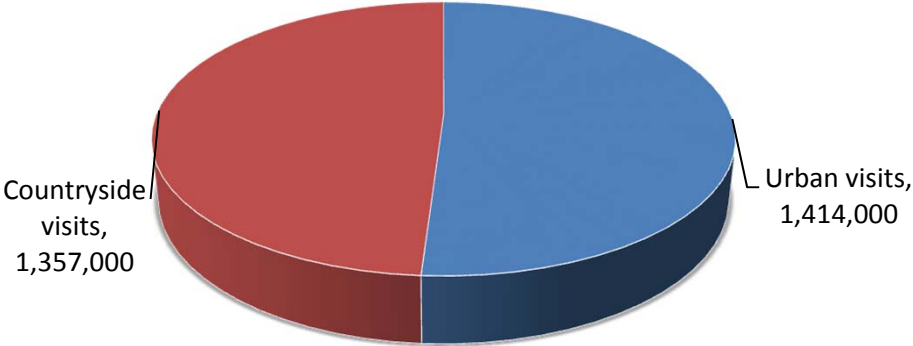


Area	Day visits	Day visit spend
Cheltenham	1.9	£74.6
Cotswold	6.8	£222.3
Forest of Dean	2.3	£77.6
Gloucester	3.5	£133.0
Stroud	2.8	£96.3
Tewkesbury	1.9	£64.3

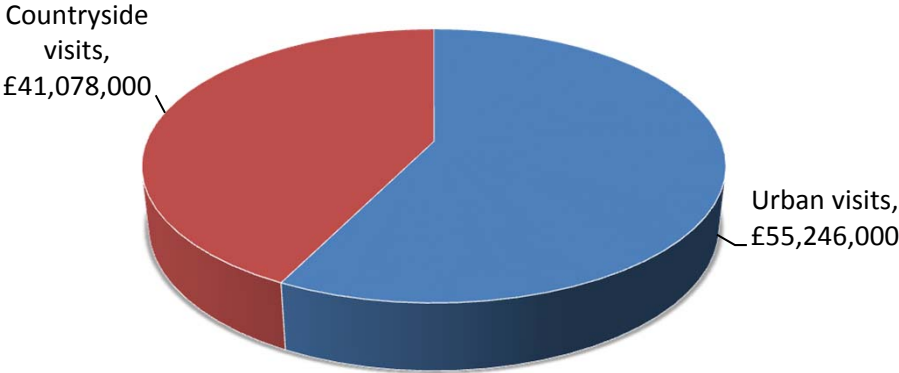
Stroud - Day visits by location

Total day visits	Total day visit spend
2,771,000	£96,324,000

Day visits



Day visit spend



Stroud – Direct visitor expenditure by category



Accommodation

- UK staying visitors £12,358,000
- Overseas staying visitors £3,703,000



Shopping

- UK staying visitors £3,923,000
- Overseas staying visitors £4,191,000
- Day visitors £32,106,000



Food & drink

- UK staying visitors £7,406,000
- Overseas staying visitors £3,344,000
- Day visitors £39,605,000



Attractions/entertainment

- UK staying visitors £3,293,000
- Overseas staying visitors £1,656,000
- Day visitors £12,710,000



Travel

- UK staying visitors £5,913,000
- Overseas staying visitors £1,502,000
- Day visitors £11,904,000

Stroud – Other visitor related expenditure by category



Second Homes

£223,000



Boats

£76,000



Visiting friends and relatives (non-visitor spend)

£5,573,000

- 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.

Stroud – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£16,277,000	£792,000	£17,069,000
Retailing	£8,033,000	£31,785,000	£39,818,000
Catering	£10,427,000	£38,417,000	£48,844,000
Attractions/entertainment	£5,138,000	£13,427,000	£18,565,000
Transport	£4,449,000	£7,142,000	£11,591,000
Arising from non trip spend	£5,872,000	£0	£5,872,000
Total Direct	£50,196,000	£91,563,000	£141,759,000

*Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£50,196,000	£91,563,000	£141,759,000
Supplier and income induced	£19,957,000	£28,116,000	£48,073,000
Total	£70,153,000	£119,679,000	£189,832,000

Stroud – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)



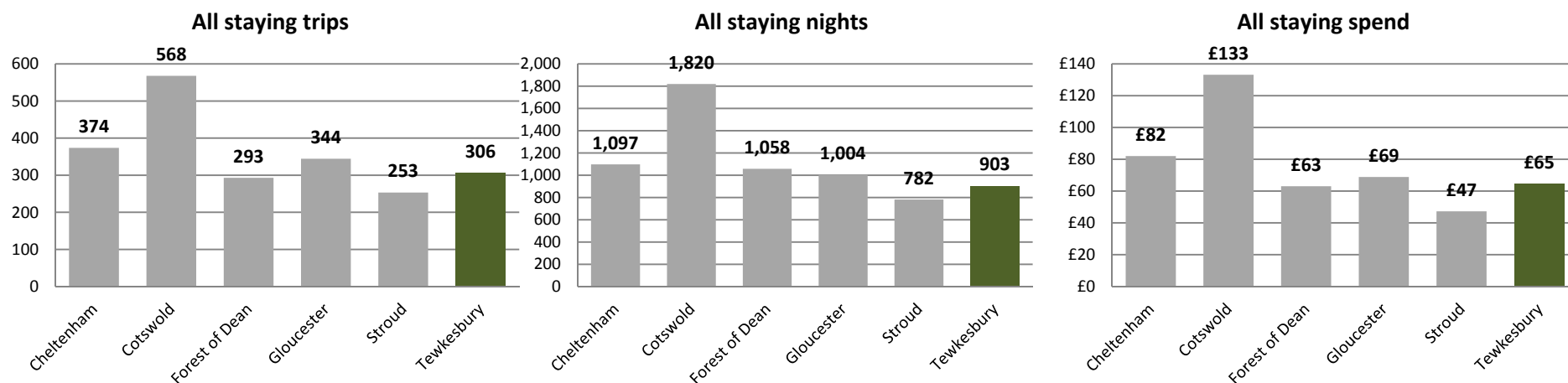
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	190	9	200
Retailing	57	226	283
Catering	123	453	576
Attractions/entertainment	72	188	259
Transport	24	38	61
Arising from non trip spend	93	0	93
Total Direct	559	914	1,473

Value of Tourism 2018

Tewkesbury

Key Facts	
306,300	Staying visitor trips
903,000	Staying visitor nights
£64,609,000	Staying visitor spend
1,887,000	Day visits
£64,291,000	Day visitor spend
£128,900,000	Direct visitor spend
£5,426,000	Other related spend
£134,326,000	TOTAL VISITOR RELATED SPEND
£153,652,000	TOTAL BUSINESS TURNOVER SUPPORTED
2,519	Estimated actual employment
1,824	FTE employment
5%	Proportion of all employment

Tewkesbury - 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	321	53	751	346	£59	£23
Cotswold	503	65	1,330	490	£100	£33
Forest of Dean	256	37	699	359	£42	£21
Gloucester	294	50	672	332	£49	£19
Stroud	218	35	531	251	£33	£14
Tewkesbury	266	40	648	255	£47	£17

Tewkesbury - Staying visits by accommodation type

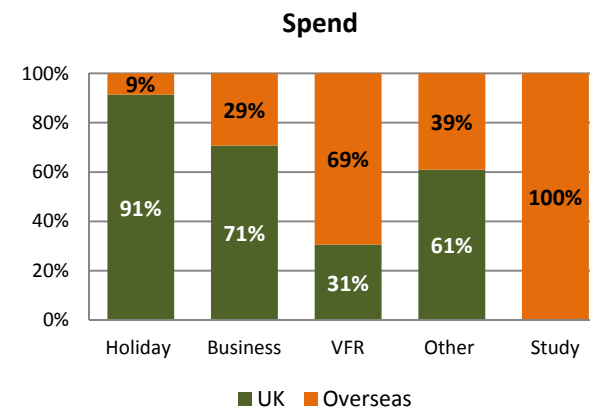
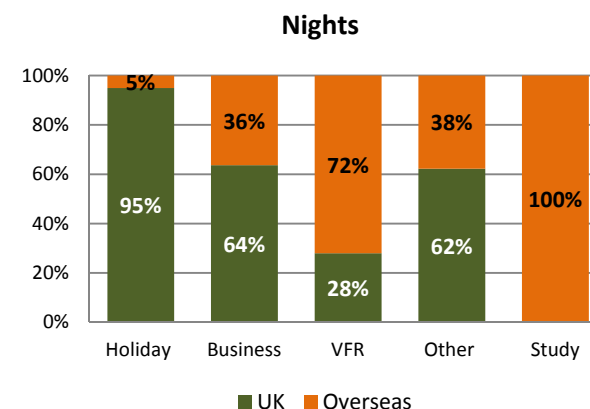
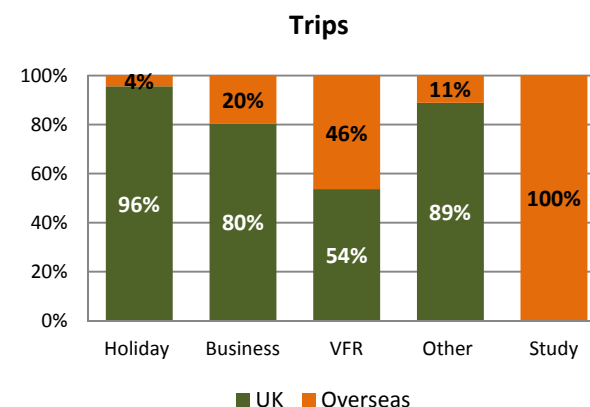
Domestic tourists	Trips	Nights	Spend
Serviced	107,300	203,000	£25,023,000
Self catering	30,500	96,000	£8,423,000
Touring caravans /tents	25,400	91,000	£3,538,000
Static vans/holiday centres	400	2,000	£91,000
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	2,700	10,000	£231,000
Boat moorings	10,300	32,000	£2,348,000
Other	2,600	10,000	£512,000
Staying with friends and relatives	86,800	204,000	£7,293,000
Total	265,900	648,000	£47,458,000

Overseas tourists	Trips	Nights	Spend
Serviced	19,200	66,000	£8,401,000
Self catering	1,300	21,000	£1,051,000
Touring caravans /tents	1,800	8,000	£394,000
Static vans/holiday centres	0	0	£10,000
Group/campus	0	0	£0
Paying guest in private homes	800	13,000	£664,000
Second homes	300	5,000	£210,000
Boat moorings	0	0	£0
Other	3,000	9,000	£597,000
Staying with friends and relatives	13,900	134,000	£5,825,000
Total	40,400	255,000	£17,151,000

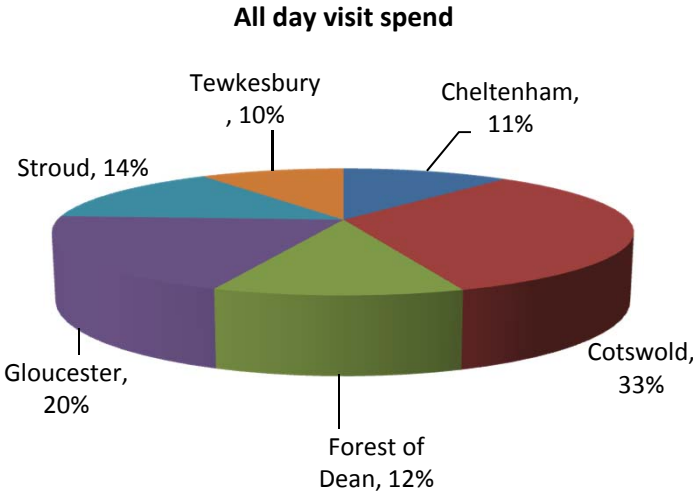
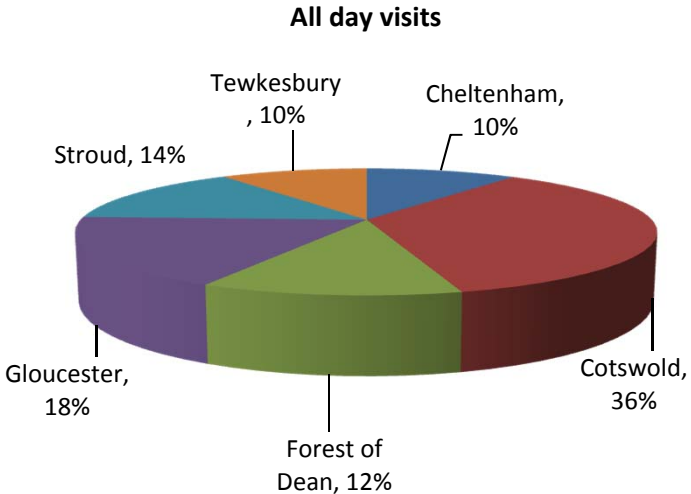
Tewkesbury - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	195,000	492,000	£33,651,000
Business	41,000	84,000	£9,400,000
Visits to friends and relatives	22,000	42,000	£2,891,000
Other	8,000	28,000	£1,516,000
Study	0	0	£0
Total	266,000	648,000	£47,458,000

Overseas tourists	Trips	Nights	Spend
Holiday	9,000	26,000	£3,173,000
Business	10,000	48,000	£3,885,000
Visits to friends and relatives	19,000	108,000	£6,575,000
Other	1,000	17,000	£971,000
Study	1,000	55,000	£2,547,000
Total	40,000	255,000	£17,151,000



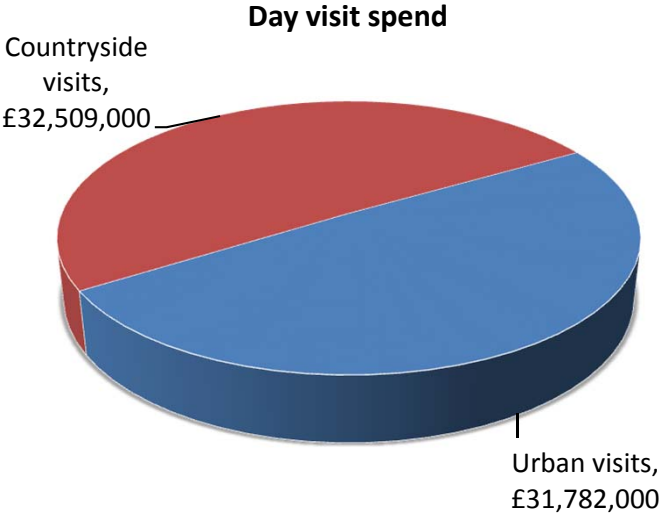
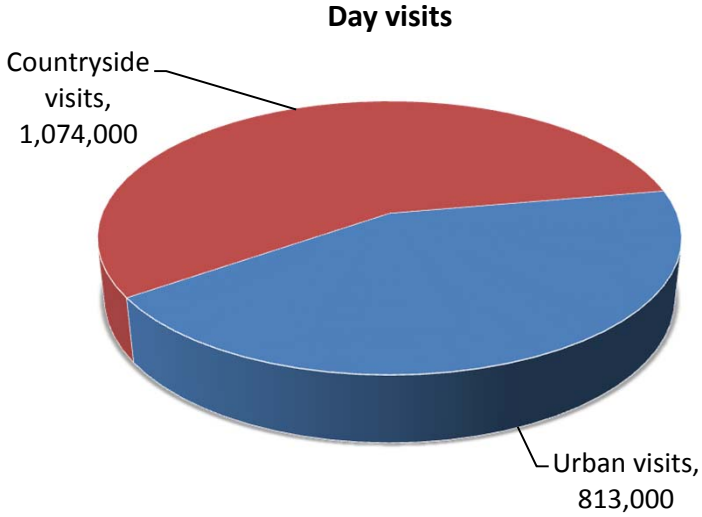
Tewkesbury - Day visits in the county context



Area	Day visits	Day visit spend
Cheltenham	1.9	£74.6
Cotswold	6.8	£222.3
Forest of Dean	2.3	£77.6
Gloucester	3.5	£133.0
Stroud	2.8	£96.3
Tewkesbury	1.9	£64.3

Tewkesbury - Day visits by location

Total day visits	Total day visit spend
1,887,000	£64,291,000



Tewkesbury – Direct visitor expenditure by category



Accommodation

- UK staying visitors £17,831,000
- Overseas staying visitors £4,890,000



Shopping

- UK staying visitors £5,660,000
- Overseas staying visitors £4,816,000
- Day visitors £20,156,000



Food & drink

- UK staying visitors £10,685,000
- Overseas staying visitors £3,668,000
- Day visitors £26,912,000



Attractions/entertainment

- UK staying visitors £4,752,000
- Overseas staying visitors £2,128,000
- Day visitors £8,910,000



Travel

- UK staying visitors £8,531,000
- Overseas staying visitors £1,649,000
- Day visitors £8,313,000

Tewkesbury – Other visitor related expenditure by category



Second Homes

£140,000



Boats

£700,000



Visiting friends and relatives (non-visitor spend)

£4,586,000

- 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.

Tewkesbury – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£23,008,000	£538,000	£23,546,000
Retailing	£10,371,000	£19,955,000	£30,326,000
Catering	£13,923,000	£26,105,000	£40,028,000
Attractions/entertainment	£7,128,000	£9,380,000	£16,508,000
Transport	£6,108,000	£4,988,000	£11,096,000
Arising from non trip spend	£5,426,000	£0	£5,426,000
Total Direct	£65,964,000	£60,966,000	£126,930,000

*Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£65,964,000	£60,966,000	£126,930,000
Supplier and income induced	£15,895,000	£10,827,000	£26,722,000
Total	£81,859,000	£71,793,000	£153,652,000

Tewkesbury – 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	282	7	289
Retailing	77	149	226
Catering	172	323	495
Attractions/entertainment	104	137	242
Transport	34	28	62
Arising from non trip spend	86	0	86
Total Direct	756	643	1,400