

# The Economic Impact of the Forest of Dean and Wye Valley Visitor Economy 2020



Produced on behalf of Forest of Dean and Wye Valley Tourism Association

By

The South West Research Company Ltd



November 2021



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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 Wye Valley in 2020. The Forest of Dean and Wye Valley marketing area consists of the Forest of Dean local authority district and also extends into Monmouthshire and Herefordshire counties and a small section of Tewkesbury local authority district.

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 the methodologies, data sources and the terms used in this report please see Appendix 1 which accompanies this report.

For an overview of 2020, including key facts about the economy, weather and key events please see Appendix 2 of this report.



## Methodology note

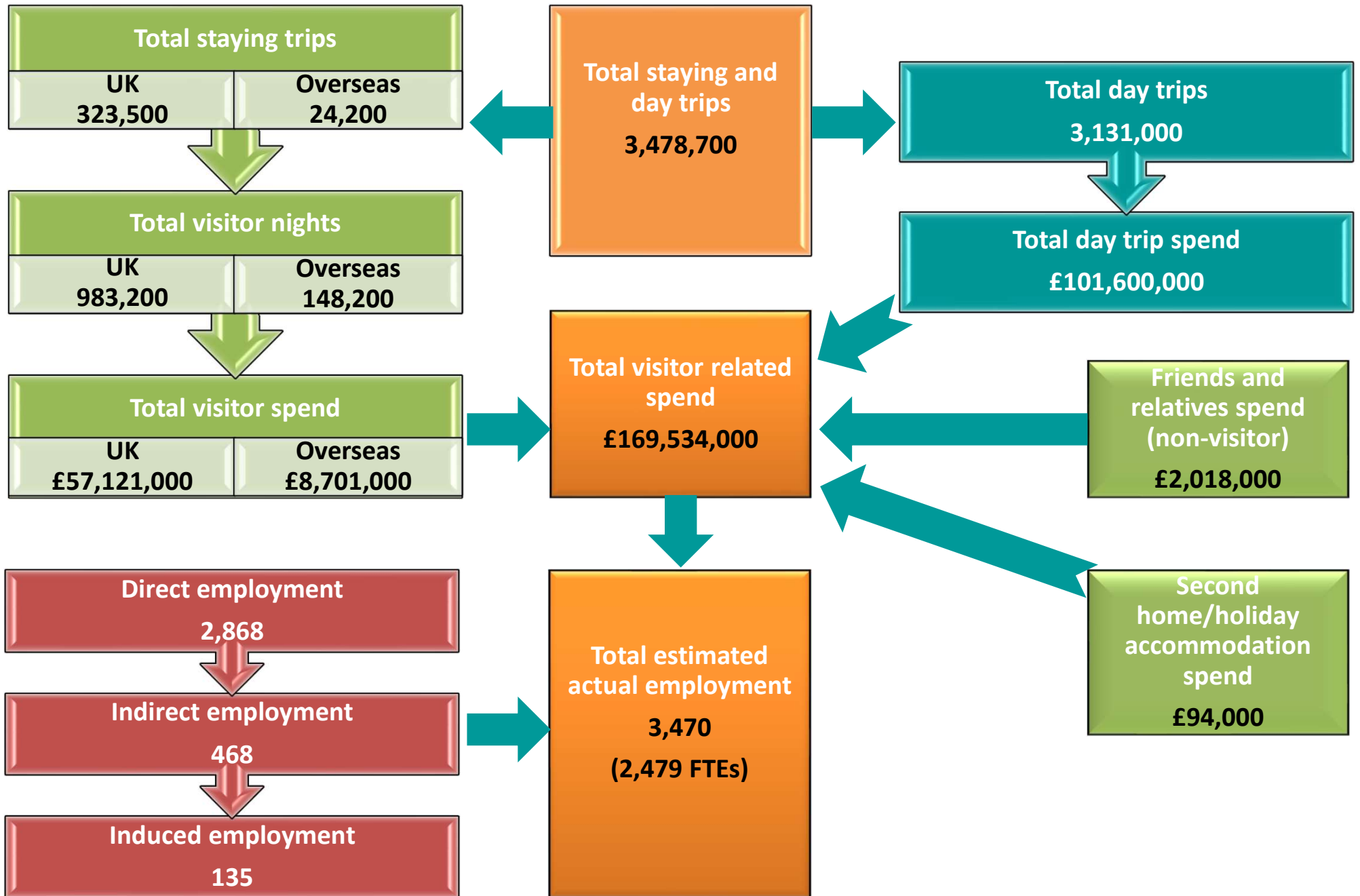
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This year's outputs are for the Covid hit year of 2020 and as a result our approach to the project needed to change. There has been very limited national survey data available for the subject year due to the pandemic and certainly nothing at a regional level or below, so as a result 2019 outputs were used as the foundation from which 2020 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 2020 input data. Once the input data was calculated the Cambridge Model was then used to produce the outputs for 2020 and as such, they are comparable with previous years whilst noting the changes above.

Employment figures show a large decrease compared to the 2019 data. However, many more tourism jobs will have been supported by Government support schemes in place in 2020 due to the pandemic e.g. furlough scheme. So the 2020 figure is an estimate of jobs supported by the 2020 visitor spend rather than an actual change in the employment numbers when compared to previous years.

# Forest of Dean and Wye Valley - Key facts at a glance

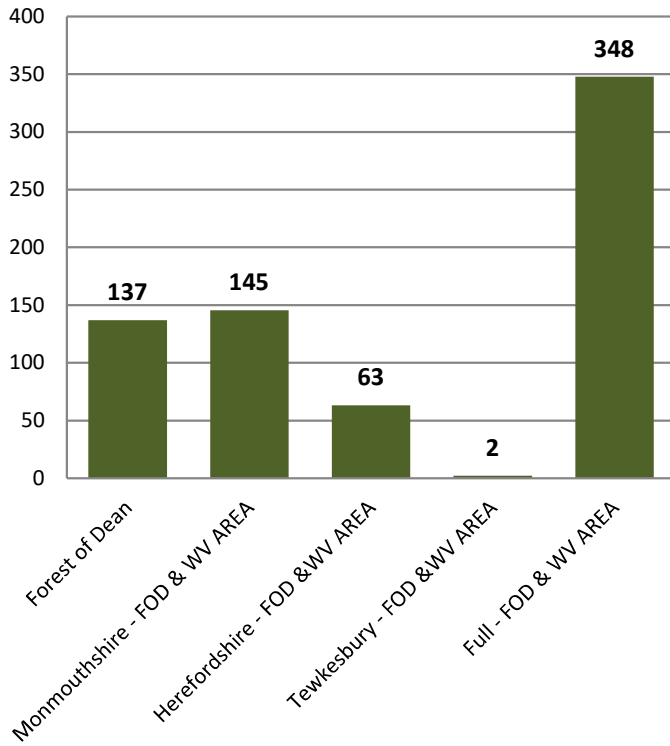


# Forest of Dean and Wye Valley

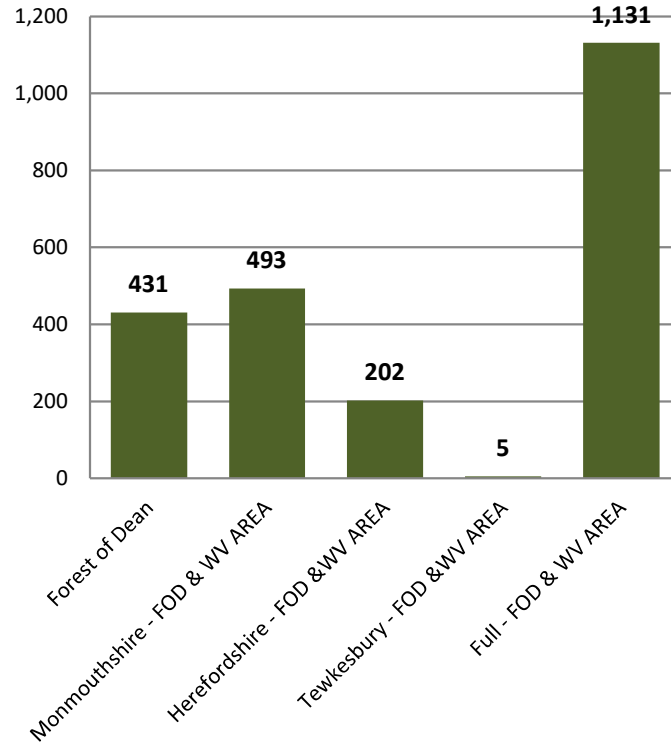
| Key statistics                   |         |
|----------------------------------|---------|
| UK average nights per trip       | 3.04    |
| UK average spend per trip        | £176.57 |
| UK average spend per night       | £58.10  |
| Overseas average nights per trip | 6.12    |
| Overseas average spend per trip  | £359.55 |
| Overseas average spend per night | £58.71  |
| Average spend per day visit      | £32.45  |

# Forest of Dean and Wye Valley - Staying visits

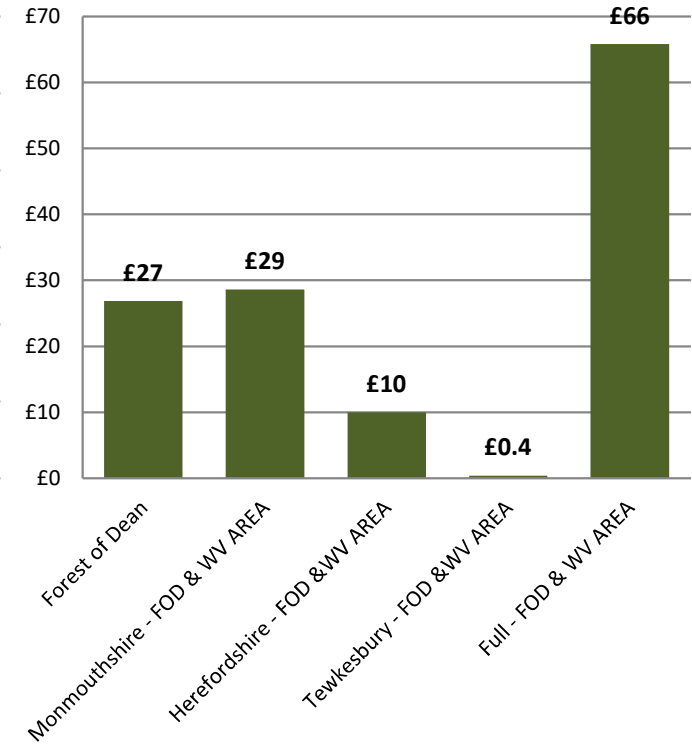
All staying trips (000's)



All staying nights (000's)



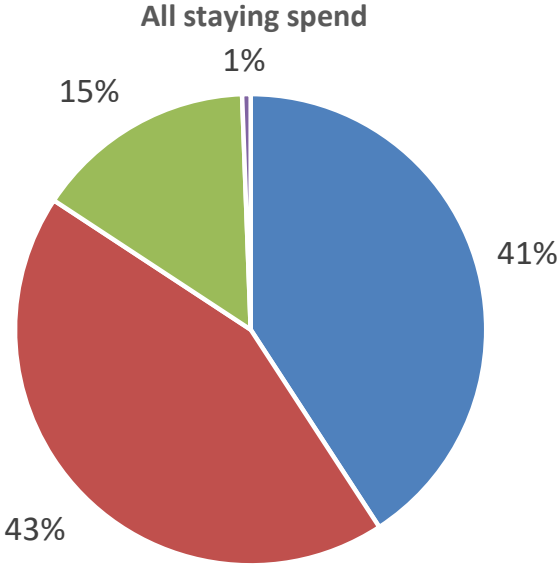
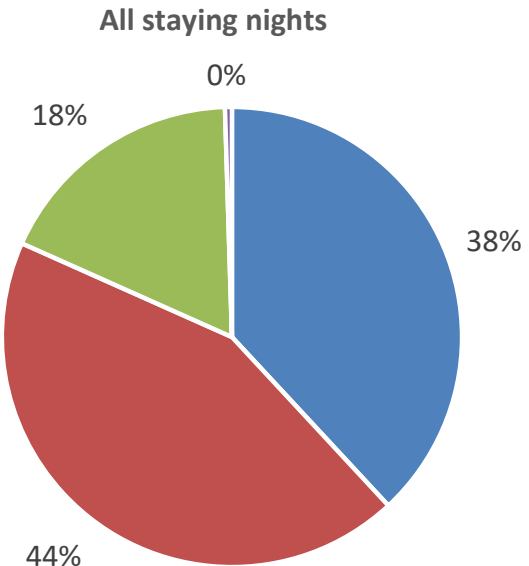
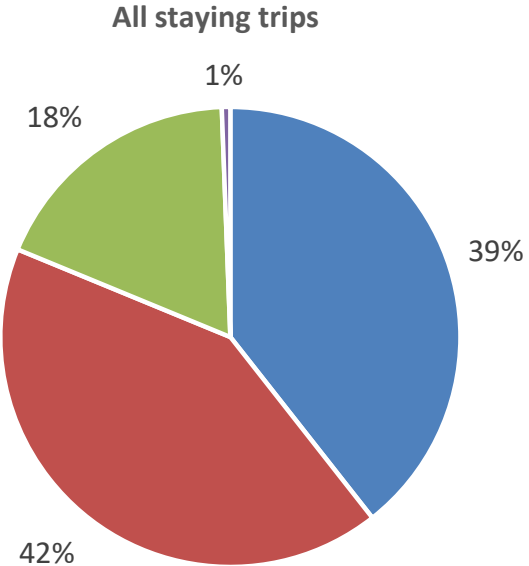
All staying spend (£ mn)



| Area                          | Domestic trips (000's) | Overseas trips (000's) | Domestic nights (000's) | Overseas nights (000's) | Domestic spend (millions) | Overseas spend (millions) |
|-------------------------------|------------------------|------------------------|-------------------------|-------------------------|---------------------------|---------------------------|
| Forest of Dean                | 126                    | 11                     | 351                     | 80                      | £22                       | £5                        |
| Monmouthshire - FOD & WV AREA | 138                    | 8                      | 454                     | 39                      | £26                       | £2                        |
| Herefordshire - FOD & WV AREA | 58                     | 5                      | 174                     | 28                      | £9                        | £1                        |
| Tewkesbury - FOD & WV AREA    | 2                      | 0                      | 4                       | 1                       | £0.3                      | £0.1                      |
| Full - FOD & WV AREA          | 324                    | 24                     | 983                     | 148                     | £57                       | £9                        |



# Forest of Dean and Wye Valley - Staying visits



- Forest of Dean
- Monmouthshire - FOD & WV AREA
- Herefordshire - FOD & WV AREA
- Tewkesbury - FOD & WV AREA



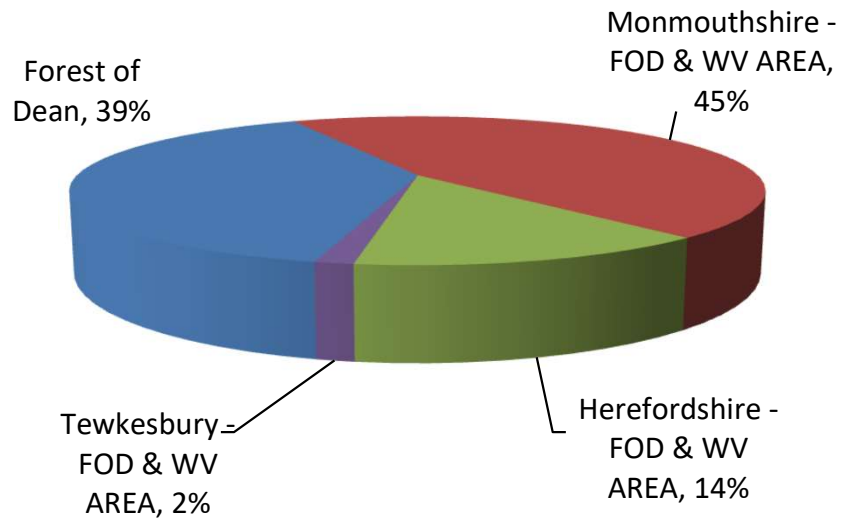
# Forest of Dean and Wye Valley - Staying visits by accommodation type

| Domestic tourists                  | Trips          | Nights         | Spend              |
|------------------------------------|----------------|----------------|--------------------|
| Serviced                           | 103,600        | 224,100        | £16,381,000        |
| Self catering                      | 71,500         | 300,000        | £20,237,000        |
| Touring caravans /tents            | 59,400         | 228,000        | £7,335,000         |
| Static vans/holiday centres        | 10,600         | 30,000         | £1,815,000         |
| Group/campus                       | 7,400          | 20,000         | £1,301,000         |
| Paying guest in private homes      | 0              | 0              | £0                 |
| Second homes                       | 1,440          | 6,100          | £373,000           |
| Boat moorings                      | 0              | 0              | £0                 |
| Other                              | 2,600          | 9,000          | £487,000           |
| Staying with friends and relatives | 66,200         | 166,000        | £9,193,000         |
| <b>Total</b>                       | <b>323,500</b> | <b>983,200</b> | <b>£57,121,000</b> |

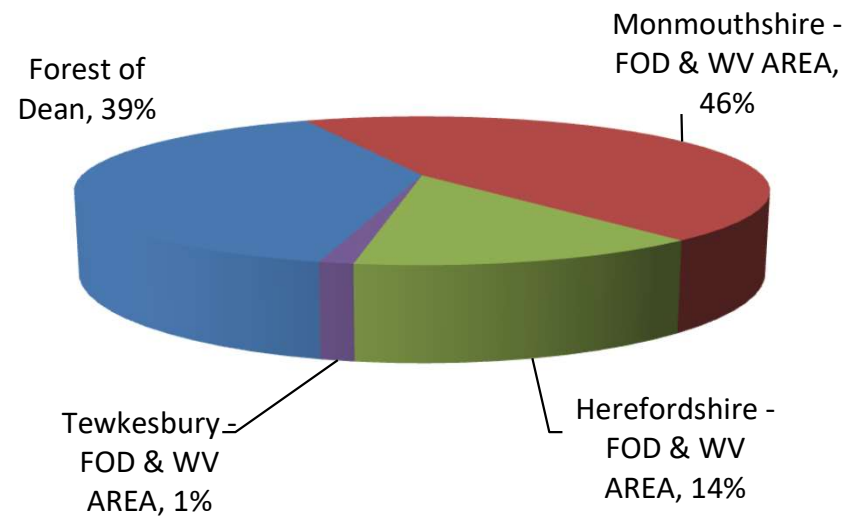
| Overseas tourists                  | Trips         | Nights         | Spend             |
|------------------------------------|---------------|----------------|-------------------|
| Serviced                           | 6,600         | 18,200         | £1,922,000        |
| Self catering                      | 2,200         | 28,000         | £1,793,000        |
| Touring caravans /tents            | 2,800         | 13,000         | £389,000          |
| Static vans/holiday centres        | 300           | 2,000          | £138,000          |
| Group/campus                       | 5,000         | 36,000         | £2,034,000        |
| Paying guest in private homes      | 0             | 0              | £0                |
| Second homes                       | 310           | 2,100          | £144,000          |
| Boat moorings                      | 0             | 0              | £0                |
| Other                              | 400           | 2,000          | £158,000          |
| Staying with friends and relatives | 6,700         | 47,000         | £2,126,000        |
| <b>Total</b>                       | <b>24,000</b> | <b>148,200</b> | <b>£8,701,000</b> |

# Forest of Dean and Wye Valley - Day visits

All day visits



All day visit spend

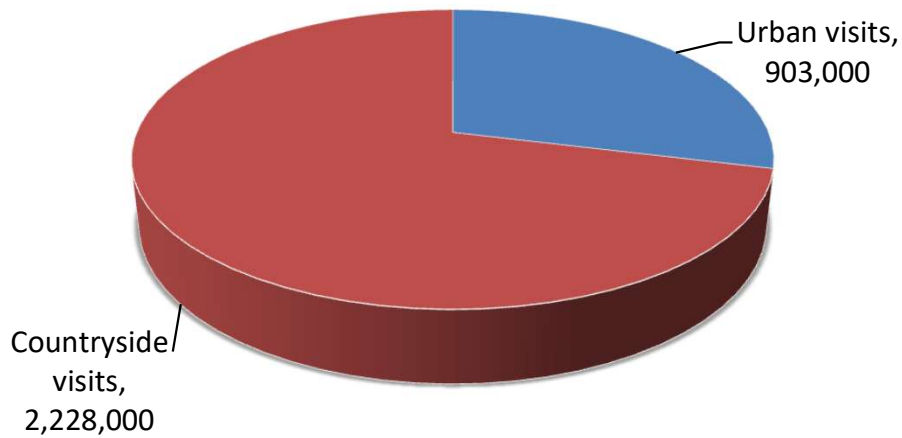


| Area                            | Day visits | Day visit spend |
|---------------------------------|------------|-----------------|
| Forest of Dean                  | 1.2        | £40.1           |
| Monmouthshire - FOD & WV AREA   | 1.4        | £46.4           |
| Herefordshire - FOD & WV AREA   | 0.4        | £13.8           |
| Tewkesbury - FOD & WV AREA      | 0.05       | £1.4            |
| <b>Full - FOD &amp; WV AREA</b> | <b>3.1</b> | <b>£101.6</b>   |

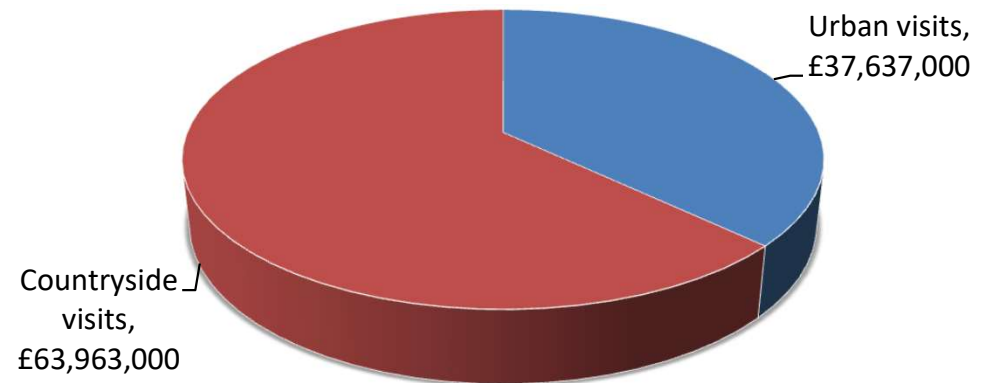
# Forest of Dean and Wye Valley - Day visits by location

| Total day visits | Total day visit spend |
|------------------|-----------------------|
| 3,131,000        | £101,600,000          |

Day visits



Day visit spend



# Forest of Dean and Wye Valley – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £23,657,000
- Overseas staying visitors £2,712,000

### Totals

**£26,369,000 (16%)**



## Shopping

- UK staying visitors £7,326,000
- Overseas staying visitors £2,558,000
- Day visitors £33,291,000

**£43,175,000 (26%)**



## Food & drink

- UK staying visitors £12,731,000
- Overseas staying visitors £1,937,000
- Day visitors £43,710,000

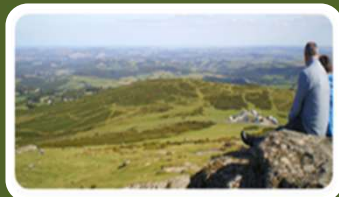
**£58,378,000 (35%)**



## Attractions/entertainment

- UK staying visitors £5,288,000
- Overseas staying visitors £783,000
- Day visitors £12,757,000

**£18,828,000 (11%)**



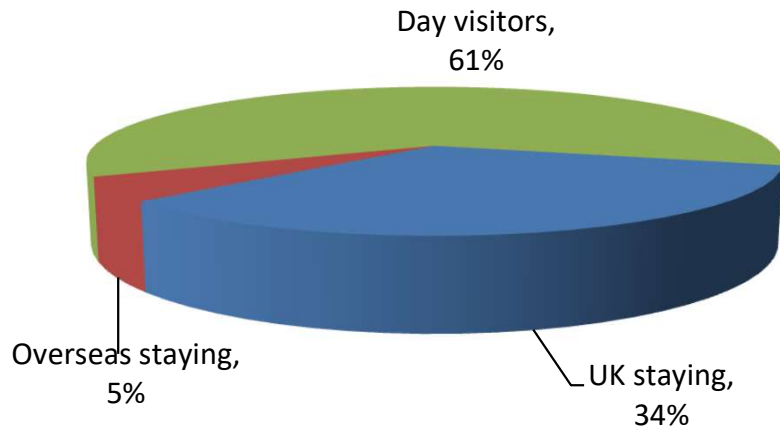
## Travel

- UK staying visitors £8,118,000
- Overseas staying visitors £715,000
- Day visitors £11,840,000

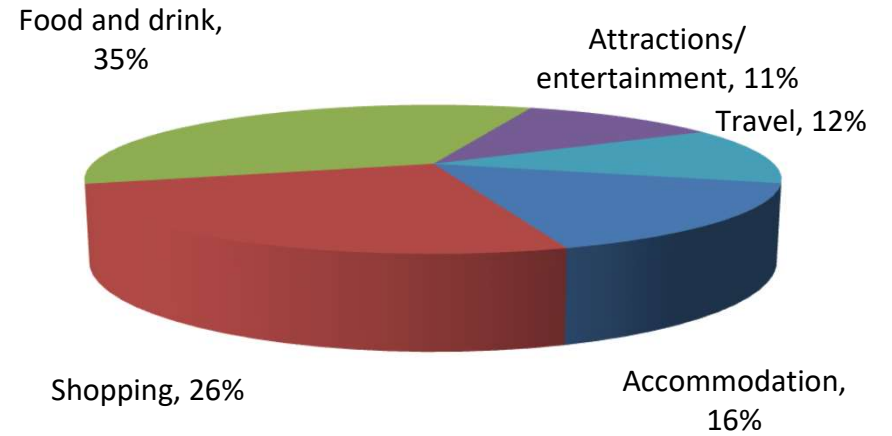
**£20,673,000 (12%)**

# Forest of Dean and Wye Valley - Direct visitor expenditure by category

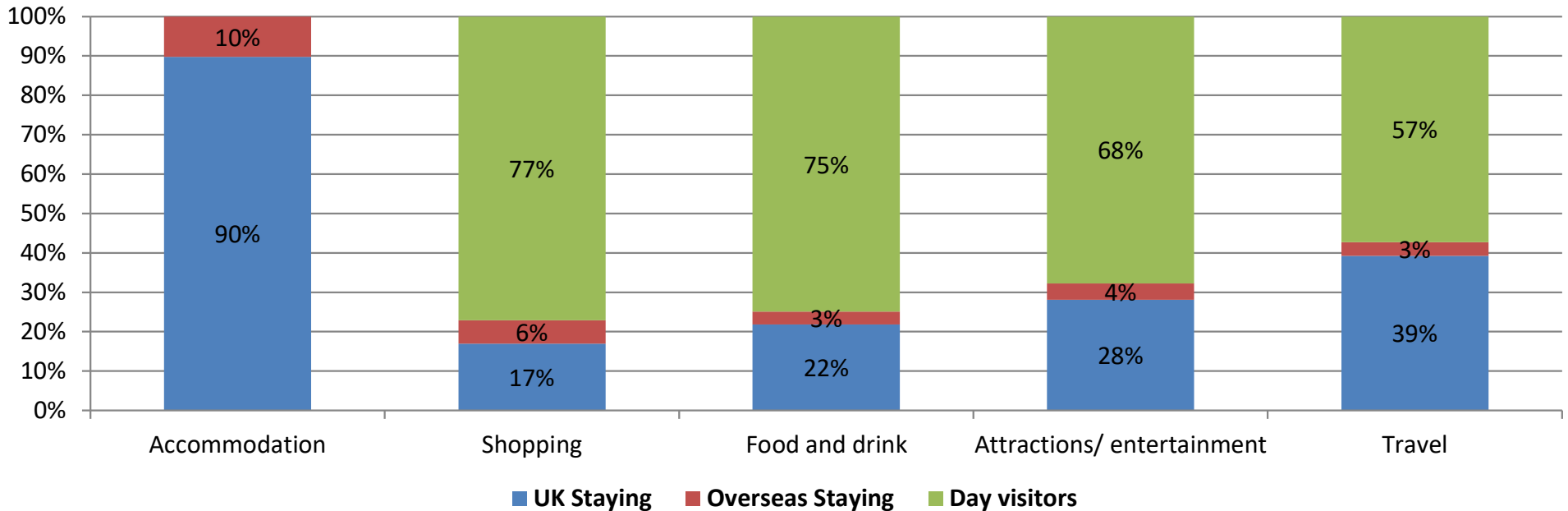
**Spend by visitor type**



**Spend by sector**



**Spend by sector and visitor type**



## Forest of Dean and Wye Valley – Other visitor related expenditure

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Second Homes

£94,000



Visiting friends and relatives (non-visitor spend)

£2,018,000

- 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 and Wye Valley – Business turnover

| Turnover derived from trip expenditure | Staying visitor related | Day visitor related | Total               |
|--|-------------------------|---------------------|---------------------|
| Accommodation                          | £26,662,000             | £874,000            | £27,536,000         |
| Retailing                              | £9,784,000              | £32,958,000         | £42,742,000         |
| Catering                               | £14,228,000             | £42,400,000         | £56,628,000         |
| Attractions/entertainment              | £6,316,000              | £13,527,000         | £19,843,000         |
| Transport                              | £5,299,000              | £7,103,000          | £12,402,000         |
| Arising from non trip spend            | £2,112,000              | £0                  | £2,112,000          |
| <b>Total Direct</b>                    | <b>£64,401,000</b>      | <b>£96,862,000</b>  | <b>£161,263,000</b> |

| Total business turnover supported by tourism activity | Staying visitor related | Day visitor related | Total               |
|---|-------------------------|---------------------|---------------------|
| Direct  | £64,401,000             | £96,862,000         | £161,263,000        |
| Supplier and income induced                           | £16,412,000             | £17,565,000         | £33,977,000         |
| <b>Total</b>  | <b>£80,813,000</b>      | <b>£114,427,000</b> | <b>£195,240,000</b> |

- Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending.
- It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.
- Income induced spending arises from expenditure by employees whose jobs are supported by tourism spend.



# Forest of Dean and Wye Valley – 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   | 376                     | 12                  | 388          |
| Retailing   | 81                      | 273                 | 354          |
| Catering  | 190                     | 566                 | 756          |
| Attractions/entertainment   | 106                     | 228                 | 334          |
| Transport   | 37                      | 49                  | 86           |
| Arising from non trip spend   | 33                      | 0                   | 33           |
| <b>Total Direct</b>   | <b>823</b>              | <b>1,128</b>        | <b>1,950</b> |

# Forest of Dean and Wye Valley – Impacts of Covid-19

| Staying visitor measures % change compared to 2019 | Trips | Nights | Spend |
|--|-------|--------|-------|
| UK staying visitors                                | -55%  | -52%   | -49%  |
| Overseas staying visitors                          | -76%  | -81%   | -82%  |
| All staying visitors                               | -58%  | -60%   | -59%  |

| Day visitor measures % change compared to 2019 | Trips | Spend |
|--|-------|-------|
| Urban day visitors                             | -62%  | -62%  |
| Countryside day visitors                       | -42%  | -42%  |
| Coastal day visitors                           | 0%    | 0%    |
| All day visitors                               | -50%  | -51%  |

| Business turnover change compared to 2019 | Staying visitor related | Day visitor related | Total visitor related |
|---|-------------------------|---------------------|-----------------------|
| Value lost                                | £124,244,000            | £117,459,000        | £241,703,000          |

# Value of Tourism 2020

## Forest of Dean

| Key Facts   |                                   |
|-------------|-----------------------------------|
| 137,000     | Staying visitor trips             |
| 431,000     | Staying visitor nights            |
| £26,858,000 | Staying visitor spend             |
| 1,220,000   | Day visits                        |
| £40,053,000 | Day visitor spend                 |
| £66,911,000 | Direct visitor spend              |
| £1,257,000  | Other related spend               |
| £68,168,000 | TOTAL VISITOR RELATED SPEND       |
| £78,595,000 | TOTAL BUSINESS TURNOVER SUPPORTED |
| 1,395       | Estimated actual employment       |
| 998         | FTE employment                    |
| 3%          | Proportion of all employment      |

## Forest of Dean - Staying visits by accommodation type

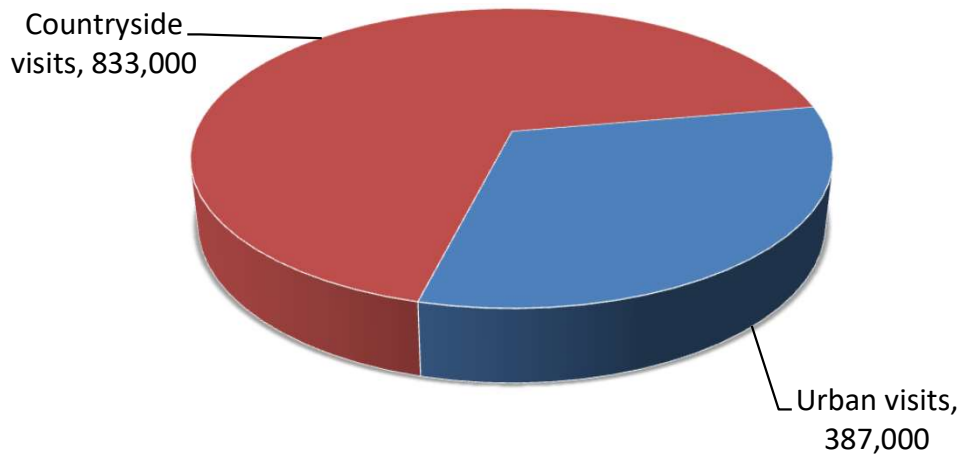
| Domestic tourists                  | Trips          | Nights         | Spend              |
|------------------------------------|----------------|----------------|--------------------|
| Serviced                           | 22,500         | 40,000         | £4,230,000         |
| Self catering                      | 35,700         | 114,000        | £8,805,000         |
| Touring caravans /tents            | 33,000         | 115,000        | £4,040,000         |
| Static vans/holiday centres        | 0              | 0              | £0                 |
| Group/campus                       | 5,300          | 13,000         | £772,000           |
| Paying guest in private homes      | 0              | 0              | £0                 |
| Second homes                       | 1,000          | 2,000          | £151,000           |
| Boat moorings                      | 0              | 0              | £0                 |
| Other                              | 1,600          | 4,000          | £234,000           |
| Staying with friends and relatives | 26,600         | 63,000         | £3,900,000         |
| <b>Total</b>                       | <b>126,000</b> | <b>351,000</b> | <b>£22,132,000</b> |

| Overseas tourists                  | Trips         | Nights        | Spend             |
|------------------------------------|---------------|---------------|-------------------|
| Serviced                           | 1,600         | 6,000         | £634,000          |
| Self catering                      | 700           | 11,000        | £530,000          |
| Touring caravans /tents            | 1,000         | 5,000         | £207,000          |
| Static vans/holiday centres        | 0             | 0             | £0                |
| Group/campus                       | 4,400         | 33,000        | £1,884,000        |
| Paying guest in private homes      | 0             | 0             | £0                |
| Second homes                       | 300           | 2,000         | £125,000          |
| Boat moorings                      | 0             | 0             | £0                |
| Other                              | 300           | 2,000         | £127,000          |
| Staying with friends and relatives | 2,800         | 21,000        | £1,219,000        |
| <b>Total</b>                       | <b>11,000</b> | <b>80,000</b> | <b>£4,726,000</b> |

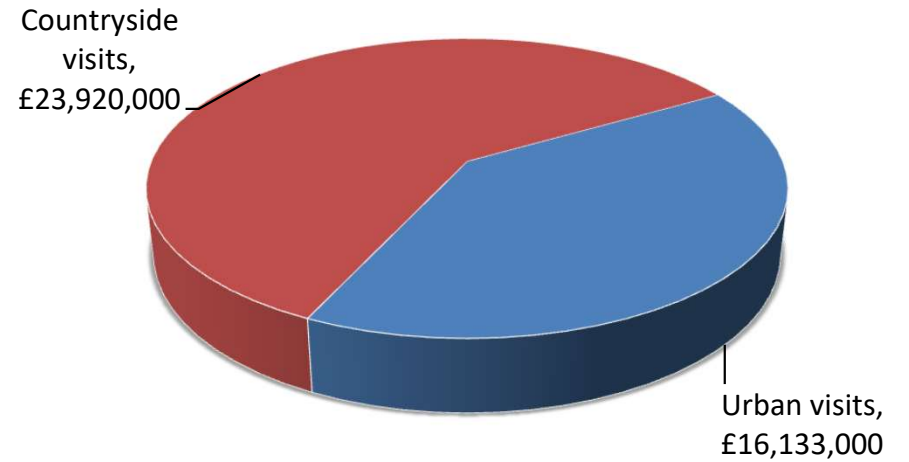
# Forest of Dean - Day visits by location

| Total day visits | Total day visit spend |
|------------------|-----------------------|
| 1,220,000        | £40,053,000           |

Day visits



Day visit spend



# Forest of Dean – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £9,166,000
- Overseas staying visitors £1,473,000

### Totals

**£10,639,000 (16%)**



## Shopping

- UK staying visitors £2,839,000
- Overseas staying visitors £1,389,000
- Day visitors £13,416,000

**£17,644,000 (26%)**



## Food & drink

- UK staying visitors £4,933,000
- Overseas staying visitors £1,052,000
- Day visitors £17,110,000

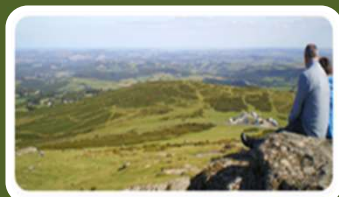
**£23,095,000 (35%)**



## Attractions/entertainment

- UK staying visitors £2,049,000
- Overseas staying visitors £425,000
- Day visitors £4,938,000

**£7,412,000 (11%)**



## Travel

- UK staying visitors £3,145,000
- Overseas staying visitors £388,000
- Day visitors £4,589,000

**£8,122,000 (12%)**

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



Second Homes  
£46,000



Visiting friends and relatives (non-visitor spend)  
£1,211,000

- 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                          | £10,758,000             | £342,000            | £11,100,000        |
| Retailing                              | £4,185,000              | £13,282,000         | £17,467,000        |
| Catering                               | £5,805,000              | £16,597,000         | £22,402,000        |
| Attractions/entertainment              | £2,576,000              | £5,243,000          | £7,819,000         |
| Transport                              | £2,120,000              | £2,753,000          | £4,873,000         |
| Arising from non trip spend            | £1,257,000              | £0                  | £1,257,000         |
| <b>Total Direct</b>                    | <b>£26,701,000</b>      | <b>£38,217,000</b>  | <b>£64,918,000</b> |

\*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  | £26,701,000             | £38,217,000         | £64,918,000        |
| Supplier and income induced                           | £6,786,000              | £6,891,000          | £13,677,000        |
| <b>Total</b>  | <b>£33,487,000</b>      | <b>£45,108,000</b>  | <b>£78,595,000</b> |

# 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   | 152                     | 5                   | 157        |
| Retailing   | 35                      | 110                 | 145        |
| Catering  | 77                      | 221                 | 299        |
| Attractions/entertainment   | 43                      | 88                  | 132        |
| Transport   | 15                      | 19                  | 34         |
| Arising from non trip spend   | 20                      | 0                   | 20         |
| <b>Total Direct</b>   | <b>341</b>              | <b>444</b>          | <b>785</b> |

# Forest of Dean – Impacts of Covid-19

| Staying visitor measures % change compared to 2019 | Trips | Nights | Spend |
|--|-------|--------|-------|
| UK staying visitors                                | -53%  | -49%   | -48%  |
| Overseas staying visitors                          | -72%  | -77%   | -80%  |
| All staying visitors                               | -55%  | -59%   | -59%  |

| Day visitor measures % change compared to 2019 | Trips | Spend |
|--|-------|-------|
| Urban day visitors                             | -52%  | -52%  |
| Countryside day visitors                       | -46%  | -46%  |
| Coastal day visitors                           | 0%    | 0%    |
| All day visitors                               | -48%  | -48%  |

| Business turnover change compared to 2019 | Staying visitor related | Day visitor related | Total visitor related |
|---|-------------------------|---------------------|-----------------------|
| Value lost                                | £49,406,000             | £41,761,000         | £91,167,000           |

# Value of Tourism 2020

## Herefordshire – (FOD & WV area)

| Key Facts   |                                   |
|-------------|-----------------------------------|
| 63,200      | Staying visitor trips             |
| 202,000     | Staying visitor nights            |
| £9,973,000  | Staying visitor spend             |
| 440,000     | Day visits                        |
| £13,821,000 | Day visitor spend                 |
| £23,794,000 | Direct visitor spend              |
| £61,000     | Other related spend               |
| £23,855,000 | TOTAL VISITOR RELATED SPEND       |
| £27,489,000 | TOTAL BUSINESS TURNOVER SUPPORTED |
| 491         | Estimated actual employment       |
| 350         | FTE employment                    |

# Herefordshire (FOD & WV area) - Staying visits by accommodation type

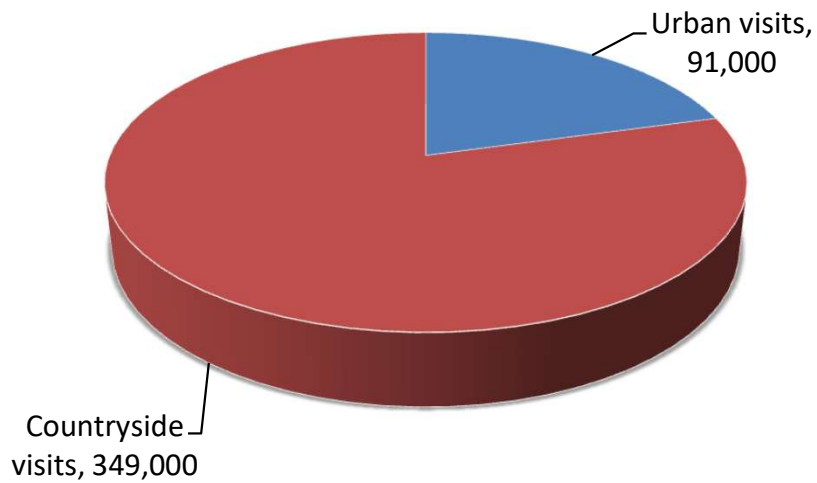
| Domestic tourists                  | Trips         | Nights         | Spend             |
|------------------------------------|---------------|----------------|-------------------|
| Serviced                           | 36,600        | 86,000         | £5,087,000        |
| Self catering                      | 9,800         | 45,000         | £2,207,000        |
| Touring caravans /tents            | 6,500         | 29,000         | £687,000          |
| Static vans/holiday centres        | 1,300         | 4,000          | £259,000          |
| Group/campus                       | 0             | 0              | £0                |
| Paying guest in private homes      | 0             | 0              | £0                |
| Second homes                       | 100           | 0              | £17,000           |
| Boat moorings                      | 0             | 0              | £0                |
| Other                              | 400           | 1,000          | £29,000           |
| Staying with friends and relatives | 2,900         | 8,000          | £291,000          |
| <b>Total</b>                       | <b>58,000</b> | <b>174,000</b> | <b>£8,576,000</b> |

| Overseas tourists                  | Trips        | Nights        | Spend             |
|------------------------------------|--------------|---------------|-------------------|
| Serviced                           | 2,300        | 6,000         | £467,000          |
| Self catering                      | 600          | 11,000        | £455,000          |
| Touring caravans /tents            | 1,200        | 5,000         | £159,000          |
| Static vans/holiday centres        | 300          | 2,000         | £138,000          |
| Group/campus                       | 0            | 0             | £0                |
| Paying guest in private homes      | 0            | 0             | £0                |
| Second homes                       | 0            | 0             | £9,000            |
| Boat moorings                      | 0            | 0             | £0                |
| Other                              | 100          | 300           | £18,000           |
| Staying with friends and relatives | 700          | 4,000         | £152,000          |
| <b>Total</b>                       | <b>5,200</b> | <b>28,000</b> | <b>£1,397,000</b> |

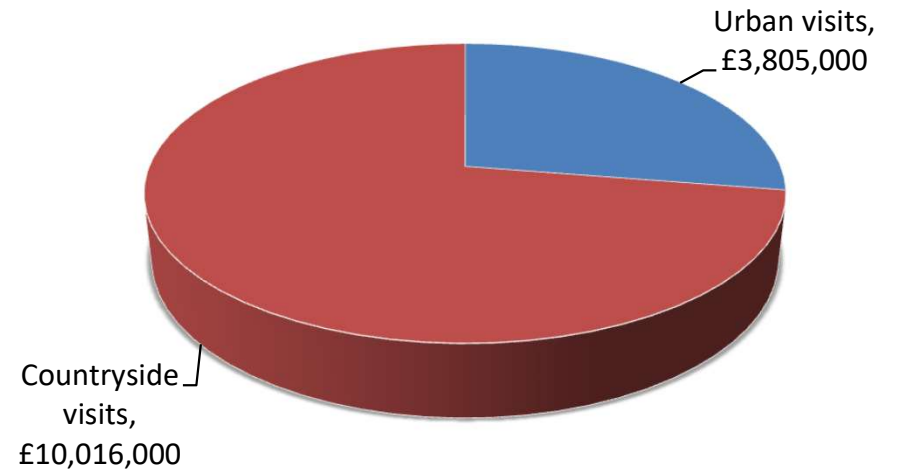
# Herefordshire (FOD & WV area) - Day visits by location

| Total day visits | Total day visit spend |
|------------------|-----------------------|
| 440,000          | £13,821,000           |

Day visits



Day visit spend



# Herefordshire (FOD & WV area) – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £3,552,000
- Overseas staying visitors £435,000

### Totals

**£3,987,000 (17%)**



## Shopping

- UK staying visitors £1,100,000
- Overseas staying visitors £411,000
- Day visitors £4,232,000

**£5,743,000 (24%)**



## Food & drink

- UK staying visitors £1,911,000
- Overseas staying visitors £311,000
- Day visitors £6,069,000

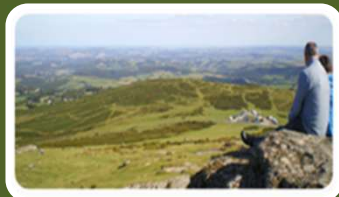
**£8,291,000 (35%)**



## Attractions/entertainment

- UK staying visitors £794,000
- Overseas staying visitors £126,000
- Day visitors £1,828,000

**£2,748,000 (12%)**



## Travel

- UK staying visitors £1,219,000
- Overseas staying visitors £115,000
- Day visitors £1,691,000

**£3,025,000 (13%)**



## Herefordshire (FOD & WV area)– Other expenditure by category



Second Homes

£4,000



Visiting friends and relatives (non-visitor spend)

£57,000

- 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.

## Herefordshire (FOD & WV area) – Business turnover

| Turnover derived from trip expenditure | Staying visitor related | Day visitor related | Total              |
|--|-------------------------|---------------------|--------------------|
| Accommodation                          | £4,032,000              | £121,000            | £4,153,000         |
| Retailing                              | £1,495,000              | £4,190,000          | £5,685,000         |
| Catering                               | £2,156,000              | £5,887,000          | £8,043,000         |
| Attractions/entertainment              | £957,000                | £1,931,000          | £2,888,000         |
| Transport                              | £800,000                | £1,014,000          | £1,814,000         |
| Arising from non trip spend            | £61,000                 | £0                  | £61,000            |
| <b>Total Direct</b>                    | <b>£9,501,000</b>       | <b>£13,143,000</b>  | <b>£22,644,000</b> |

\*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  | £9,501,000              | £13,143,000         | £22,644,000        |
| Supplier and income induced                           | £2,421,000              | £2,424,000          | £4,845,000         |
| <b>Total</b>  | <b>£11,922,000</b>      | <b>£15,567,000</b>  | <b>£27,489,000</b> |

# Herefordshire (FOD & WV area) – 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   | 57                      | 2                   | 59         |
| Retailing   | 12                      | 35                  | 47         |
| Catering  | 29                      | 79                  | 107        |
| Attractions/entertainment   | 16                      | 32                  | 49         |
| Transport   | 6                       | 7                   | 13         |
| Arising from non trip spend   | 1                       | 0                   | 1          |
| <b>Total Direct</b>   | <b>121</b>              | <b>154</b>          | <b>275</b> |

# Herefordshire (FOD & WV area) – Impacts of Covid-19

| Staying visitor measures % change compared to 2019 | Trips | Nights | Spend |
|--|-------|--------|-------|
| UK staying visitors                                | -64%  | -61%   | -68%  |
| Overseas staying visitors                          | -85%  | -88%   | -89%  |
| All staying visitors                               | -68%  | -71%   | -70%  |

| Day visitor measures % change compared to 2019 | Trips | Spend |
|--|-------|-------|
| Urban day visitors                             | -67%  | -66%  |
| Countryside day visitors                       | -40%  | -39%  |
| Coastal day visitors                           | 0%    | 0%    |
| All day visitors                               | -48%  | -50%  |

| Business turnover change compared to 2019 | Staying visitor related | Day visitor related | Total visitor related |
|---|-------------------------|---------------------|-----------------------|
| Value lost                                | £30,814,000             | £15,370,000         | £46,184,000           |

# Value of Tourism 2020

## Monmouthshire – (FOD & WV area)

| Key Facts   |                                   |
|-------------|-----------------------------------|
| 145,400     | Staying visitor trips             |
| 493,000     | Staying visitor nights            |
| £28,604,000 | Staying visitor spend             |
| 1,424,000   | Day visits                        |
| £46,372,000 | Day visitor spend                 |
| £74,976,000 | Direct visitor spend              |
| £749,000    | Other related spend               |
| £75,725,000 | TOTAL VISITOR RELATED SPEND       |
| £87,114,000 | TOTAL BUSINESS TURNOVER SUPPORTED |
| 1,548       | Estimated actual employment       |
| 1,104       | FTE employment                    |

# Monmouthshire (FOD & WV area) - Staying visits by accommodation type

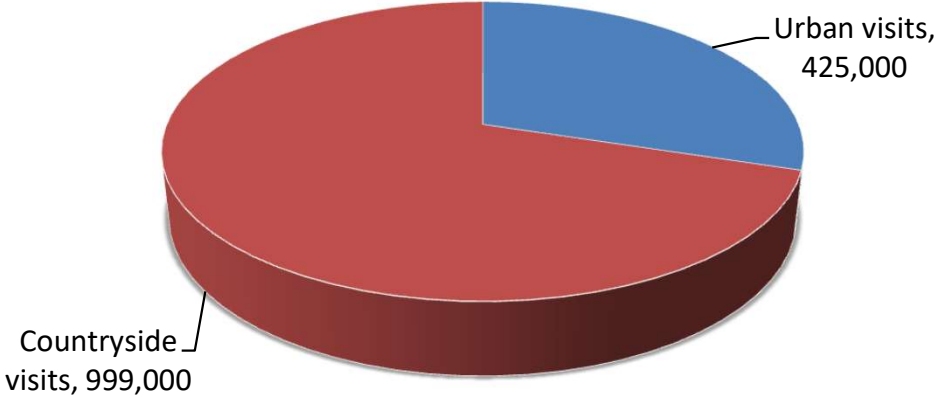
| Domestic tourists                  | Trips          | Nights         | Spend              |
|------------------------------------|----------------|----------------|--------------------|
| Serviced                           | 43,900         | 97,000         | £6,944,000         |
| Self catering                      | 26,000         | 141,000        | £9,225,000         |
| Touring caravans /tents            | 19,900         | 84,000         | £2,608,000         |
| Static vans/holiday centres        | 9,300          | 26,000         | £1,556,000         |
| Group/campus                       | 2,100          | 7,000          | £529,000           |
| Paying guest in private homes      | 0              | 0              | £0                 |
| Second homes                       | 300            | 4,000          | £200,000           |
| Boat moorings                      | 0              | 0              | £0                 |
| Other                              | 600            | 4,000          | £224,000           |
| Staying with friends and relatives | 35,500         | 92,000         | £4,820,000         |
| <b>Total</b>                       | <b>137,600</b> | <b>454,000</b> | <b>£26,105,000</b> |

| Overseas tourists                  | Trips        | Nights        | Spend             |
|------------------------------------|--------------|---------------|-------------------|
| Serviced                           | 2,700        | 6,000         | £803,000          |
| Self catering                      | 900          | 6,000         | £808,000          |
| Touring caravans /tents            | 600          | 3,000         | £23,000           |
| Static vans/holiday centres        | 0            | 0             | £0                |
| Group/campus                       | 600          | 3,000         | £150,000          |
| Paying guest in private homes      | 0            | 0             | £0                |
| Second homes                       | 0            | 0             | £6,000            |
| Boat moorings                      | 0            | 0             | £0                |
| Other                              | 0            | 0             | £13,000           |
| Staying with friends and relatives | 3,100        | 21,000        | £698,000          |
| <b>Total</b>                       | <b>7,800</b> | <b>39,000</b> | <b>£2,499,000</b> |

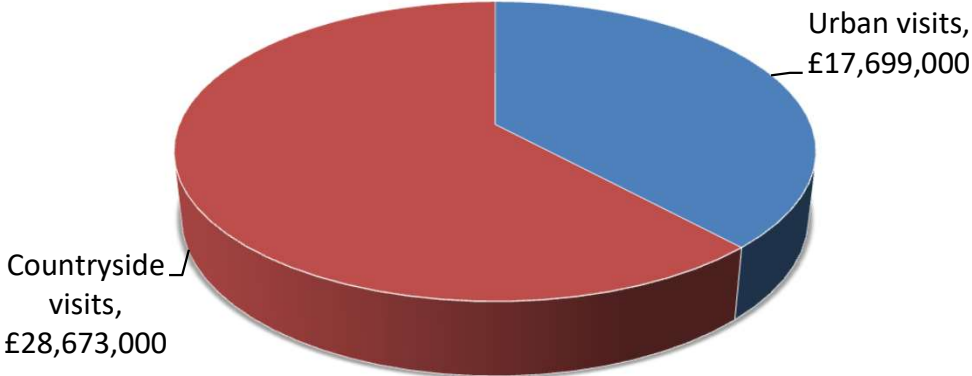
# Monmouthshire (FOD & WV area) - Day visits by location

| Total day visits | Total day visit spend |
|------------------|-----------------------|
| 1,424,000        | £46,372,000           |

Day visits



Day visit spend



# Monmouthshire (FOD & WV area) – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £10,812,000
- Overseas staying visitors £779,000

### Totals

**£11,591,000 (15%)**



## Shopping

- UK staying visitors £3,348,000
- Overseas staying visitors £375,000
- Day visitors £15,312,000

**£19,395,000 (26%)**



## Food & drink

- UK staying visitors £5,818,000
- Overseas staying visitors £556,000
- Day visitors £19,902,000

**£26,276,000 (35%)**



## Attractions/entertainment

- UK staying visitors £2,417,000
- Overseas staying visitors £225,000
- Day visitors £5,786,000

**£8,428,000 (11%)**



## Travel

- UK staying visitors £3,710,000
- Overseas staying visitors £205,000
- Day visitors £5,372,000

**£9,287,000 (12%)**



## Monmouthshire (FOD & WV area)– Other expenditure by category



Second Homes

£43,000



Visiting friends and relatives (non-visitor spend)

£706,000

- 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.

## Monmouthshire (FOD & WV area) – Business turnover

| Turnover derived from trip expenditure | Staying visitor related | Day visitor related | Total              |
|--|-------------------------|---------------------|--------------------|
| Accommodation                          | £11,718,000             | £398,000            | £12,116,000        |
| Retailing                              | £4,042,000              | £15,159,000         | £19,201,000        |
| Catering                               | £6,183,000              | £19,305,000         | £25,488,000        |
| Attractions/entertainment              | £2,746,000              | £6,138,000          | £8,884,000         |
| Transport                              | £2,349,000              | £3,223,000          | £5,572,000         |
| Arising from non trip spend            | £749,000                | £0                  | £749,000           |
| <b>Total Direct</b>                    | <b>£27,787,000</b>      | <b>£44,223,000</b>  | <b>£72,010,000</b> |

\*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  | £27,787,000             | £44,223,000         | £72,010,000        |
| Supplier and income induced                           | £7,101,000              | £8,003,000          | £15,104,000        |
| <b>Total</b>  | <b>£34,888,000</b>      | <b>£52,226,000</b>  | <b>£87,114,000</b> |

# Monmouthshire (FOD & WV area) – 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   | 165                     | 6                   | 171        |
| Retailing   | 33                      | 126                 | 159        |
| Catering  | 83                      | 258                 | 340        |
| Attractions/entertainment   | 46                      | 103                 | 149        |
| Transport   | 16                      | 22                  | 39         |
| Arising from non trip spend   | 12                      | 0                   | 12         |
| <b>Total Direct</b>   | <b>355</b>              | <b>514</b>          | <b>870</b> |

# Monmouthshire (FOD & WV area) – Impacts of Covid-19

| Staying visitor measures % change compared to 2019 | Trips | Nights | Spend |
|--|-------|--------|-------|
| UK staying visitors                                | -52%  | -48%   | -47%  |
| Overseas staying visitors                          | -72%  | -77%   | -80%  |
| All staying visitors                               | -53%  | -53%   | -54%  |

| Day visitor measures % change compared to 2019 | Trips | Spend |
|--|-------|-------|
| Urban day visitors                             | -67%  | -67%  |
| Countryside day visitors                       | -39%  | -38%  |
| Coastal day visitors                           | 0%    | 0%    |
| All day visitors                               | -51%  | -54%  |

| Business turnover change compared to 2019 | Staying visitor related | Day visitor related | Total visitor related |
|---|-------------------------|---------------------|-----------------------|
| Value lost                                | £43,129,000             | £59,056,000         | £102,185,000          |

# Value of Tourism 2020

## Tewkesbury – (FOD & WV area)

| Key Facts  |                                   |
|------------|-----------------------------------|
| 2,100      | Staying visitor trips             |
| 5,400      | Staying visitor nights            |
| £387,000   | Staying visitor spend             |
| 47,000     | Day visits                        |
| £1,354,000 | Day visitor spend                 |
| £1,741,000 | Direct visitor spend              |
| £45,000    | Other related spend               |
| £1,786,000 | TOTAL VISITOR RELATED SPEND       |
| £2,042,000 | TOTAL BUSINESS TURNOVER SUPPORTED |
| 37         | Estimated actual employment       |
| 26         | FTE employment                    |

## Tewkesbury (FOD & WV area) - Staying visits by accommodation type

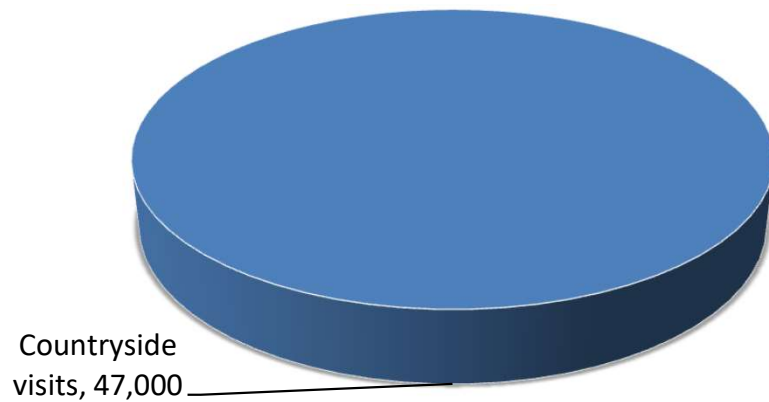
| Domestic tourists                  | Trips        | Nights       | Spend           |
|------------------------------------|--------------|--------------|-----------------|
| Serviced                           | 600          | 1,100        | £120,000        |
| Self catering                      | 0            | 0            | £0              |
| Touring caravans /tents            | 0            | 0            | £0              |
| Static vans/holiday centres        | 0            | 0            | £0              |
| Group/campus                       | 0            | 0            | £0              |
| Paying guest in private homes      | 0            | 0            | £0              |
| Second homes                       | 40           | 100          | £5,000          |
| Boat moorings                      | 0            | 0            | £0              |
| Other                              | 0            | 0            | £0              |
| Staying with friends and relatives | 1,200        | 3,000        | £182,000        |
| <b>Total</b>                       | <b>1,900</b> | <b>4,200</b> | <b>£308,000</b> |

| Overseas tourists                  | Trips      | Nights       | Spend          |
|------------------------------------|------------|--------------|----------------|
| Serviced                           | 0          | 200          | £18,000        |
| Self catering                      | 0          | 0            | £0             |
| Touring caravans /tents            | 0          | 0            | £0             |
| Static vans/holiday centres        | 0          | 0            | £0             |
| Group/campus                       | 0          | 0            | £0             |
| Paying guest in private homes      | 0          | 0            | £0             |
| Second homes                       | 10         | 100          | £4,000         |
| Boat moorings                      | 0          | 0            | £0             |
| Other                              | 0          | 0            | £0             |
| Staying with friends and relatives | 100        | 1,000        | £57,000        |
| <b>Total</b>                       | <b>200</b> | <b>1,200</b> | <b>£79,000</b> |

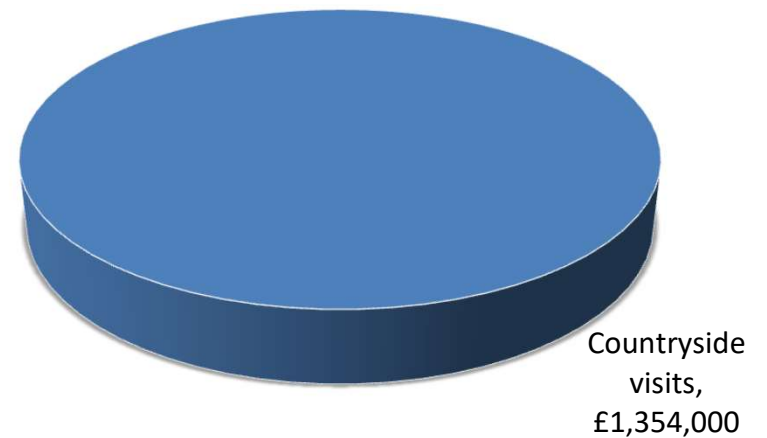
# Tewkesbury (FOD & WV area) - Day visits by location

| Total day visits | Total day visit spend |
|------------------|-----------------------|
| 47,000           | £1,354,000            |

Day visits



Day visit spend



# Tewkesbury (FOD & WV area) – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £127,000
- Overseas staying visitors £25,000

Totals

**£152,000 (9%)**



## Shopping

- UK staying visitors £39,000
- Overseas staying visitors £23,000
- Day visitors £331,000

**£393,000 (23%)**



## Food & drink

- UK staying visitors £69,000
- Overseas staying visitors £18,000
- Day visitors £629,000

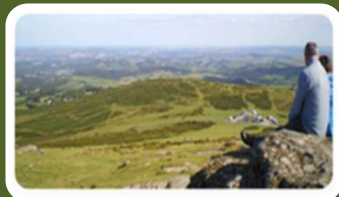
**£716,000 (41%)**



## Attractions/entertainment

- UK staying visitors £28,000
- Overseas staying visitors £7,000
- Day visitors £205,000

**£240,000 (14%)**



## Travel

- UK staying visitors £44,000
- Overseas staying visitors £7,000
- Day visitors £188,000

**£239,000 (14%)**



## Tewkesbury (FOD & WV area)– Other expenditure by category



Second Homes  
£1,000



Visiting friends and relatives (non-visitor spend)  
£44,000

- 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.

## Tewkesbury (FOD & WV area) – Business turnover

| Turnover derived from trip expenditure | Staying visitor related | Day visitor related | Total             |
|--|-------------------------|---------------------|-------------------|
| Accommodation                          | £154,000                | £13,000             | £167,000          |
| Retailing                              | £62,000                 | £327,000            | £389,000          |
| Catering                               | £84,000                 | £611,000            | £695,000          |
| Attractions/entertainment              | £37,000                 | £215,000            | £252,000          |
| Transport                              | £30,000                 | £113,000            | £143,000          |
| Arising from non trip spend            | £45,000                 | £0                  | £45,000           |
| <b>Total Direct</b>                    | <b>£412,000</b>         | <b>£1,279,000</b>   | <b>£1,691,000</b> |

\*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  | £412,000                | £1,279,000          | £1,691,000        |
| Supplier and income induced                           | £104,000                | £247,000            | £351,000          |
| <b>Total</b>  | <b>£516,000</b>         | <b>£1,526,000</b>   | <b>£2,042,000</b> |

# Tewkesbury (FOD & WV area) – 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   | 2                       | 0                   | 2         |
| Retailing   | 1                       | 3                   | 3         |
| Catering  | 1                       | 8                   | 9         |
| Attractions/entertainment   | 1                       | 4                   | 4         |
| Transport   | 0                       | 1                   | 1         |
| Arising from non trip spend   | 1                       | 0                   | 1         |
| <b>Total Direct</b>   | <b>5</b>                | <b>15</b>           | <b>21</b> |

# Tewkesbury (FOD & WV area) – Impacts of Covid-19

| Staying visitor measures % change compared to 2019 | Trips | Nights | Spend |
|--|-------|--------|-------|
| UK staying visitors                                | -67%  | -67%   | -52%  |
| Overseas staying visitors                          | -78%  | -81%   | -80%  |
| All staying visitors                               | -69%  | -72%   | -63%  |

| Day visitor measures % change compared to 2019 | Trips | Spend |
|--|-------|-------|
| Urban day visitors                             | -0%   | -0%   |
| Countryside day visitors                       | -47%  | -46%  |
| Coastal day visitors                           | 0%    | 0%    |
| All day visitors                               | -47%  | -46%  |

| Business turnover change compared to 2019 | Staying visitor related | Day visitor related | Total visitor related |
|---|-------------------------|---------------------|-----------------------|
| Value lost                                | £895,000                | £1,272,000          | £2,167,000            |