

The Economic Impact of the Forest of Dean and Wye Valley Visitor Economy 2021



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

By

The South West Research Company Ltd



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Introduction

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in the Forest of Dean and Wye Valley in 2021. 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 2021, including key facts about the economy, weather and key events please see Appendix 2 of this report.



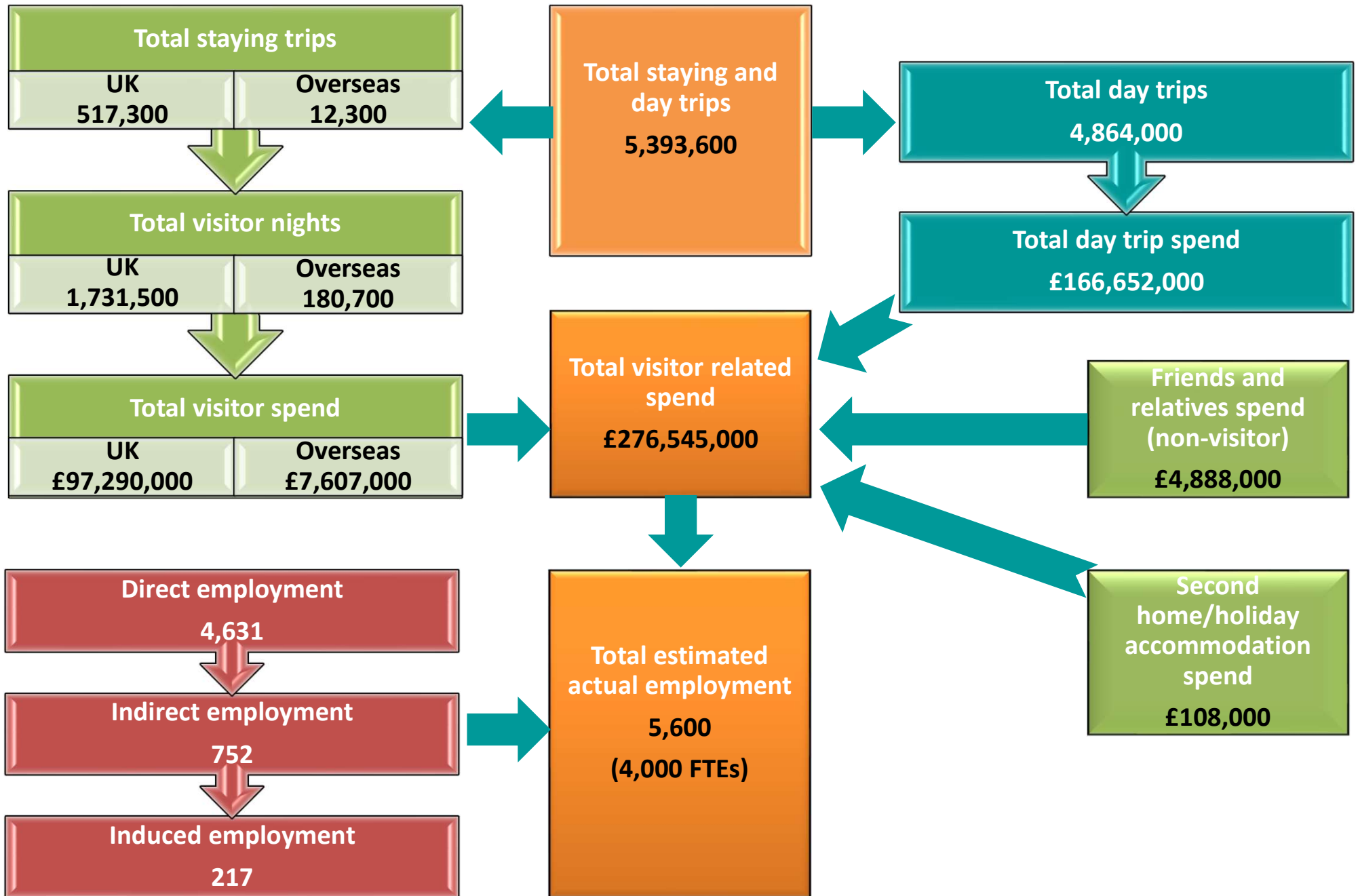
Methodology note

This year's outputs are for the Covid hit year of 2021 and as a result our approach to the project again 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 2021 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 2021 input data. Once the input data was calculated the Cambridge Model was then used to produce the outputs for 2021 and as such, they are comparable with previous years whilst noting the changes above.

Employment figures show a decrease compared to the 2019 data. However, many more tourism jobs will have been supported by Government support schemes in place in 2021 due to the pandemic e.g. furlough scheme. So the 2021 figure is an estimate of jobs supported by the 2021 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

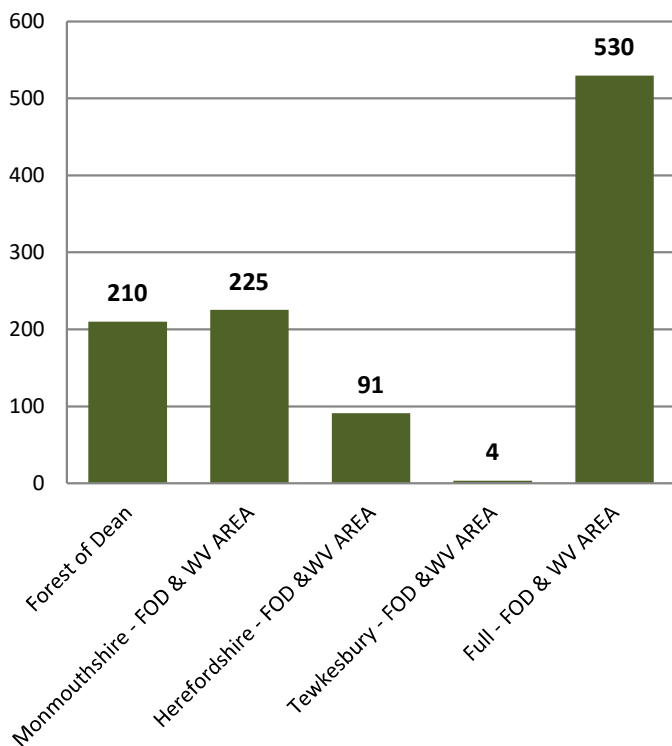


Forest of Dean and Wye Valley

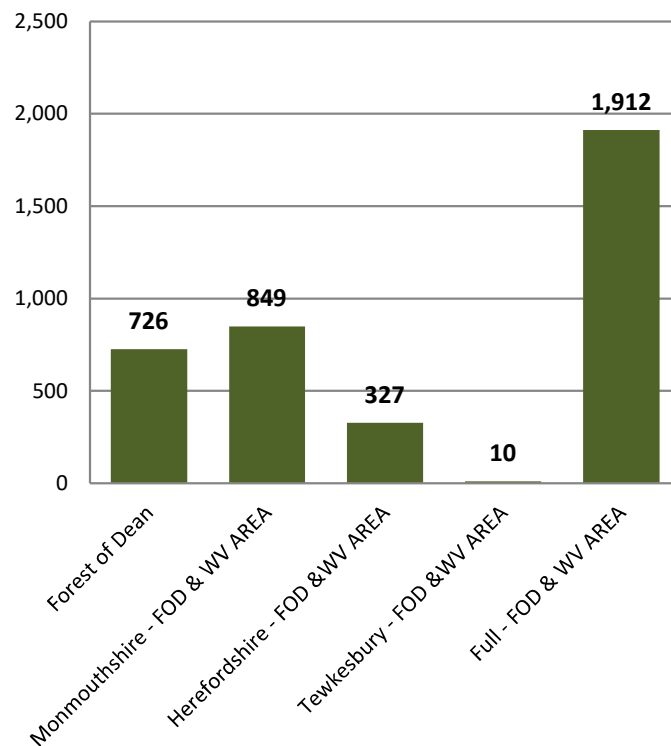
Key statistics	
UK average nights per trip	3.35
UK average spend per trip	£188.07
UK average spend per night	£56.19
Overseas average nights per trip	14.69
Overseas average spend per trip	£618.46
Overseas average spend per night	£42.10
Average spend per day visit	£34.26

Forest of Dean and Wye Valley - Staying visits

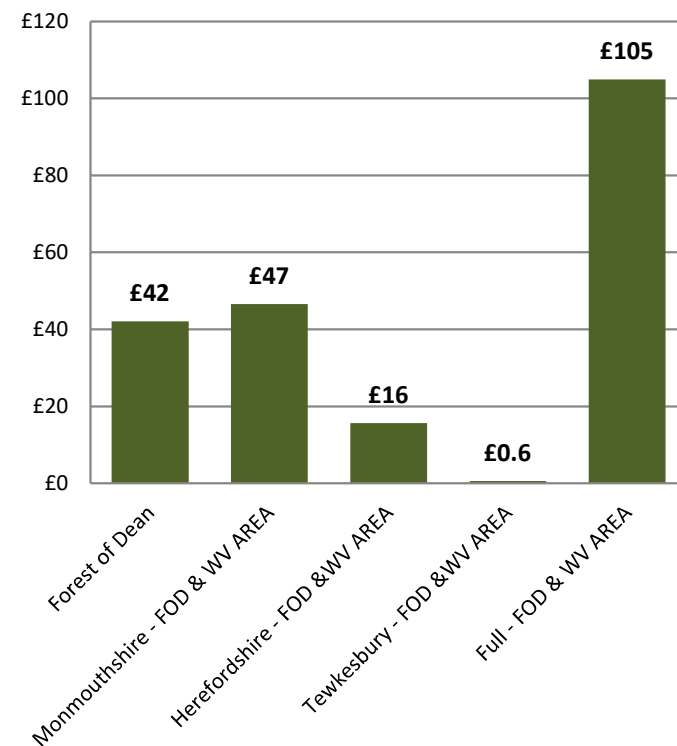
All staying trips (000's)



All staying nights (000's)

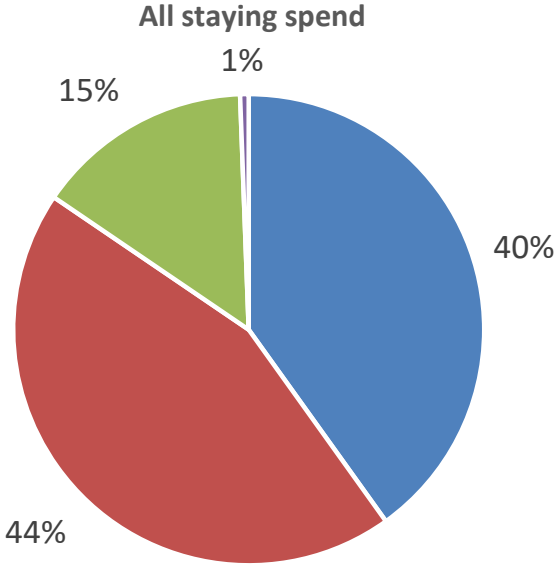
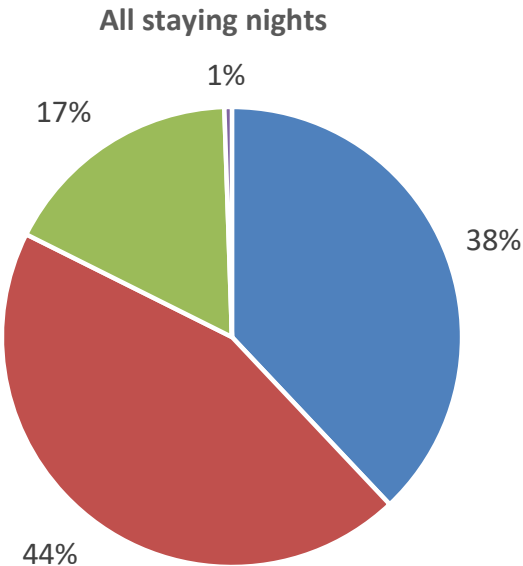
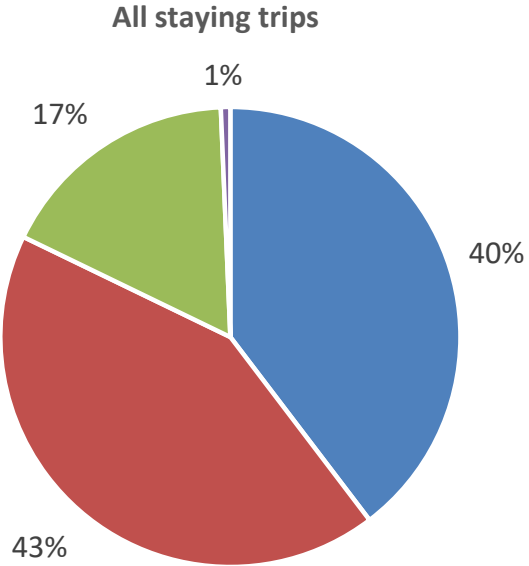


All staying spend (£ mn)



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	204	6	620	106	£38	£4
Monmouthshire - FOD & WV AREA	221	4	799	50	£44	£2
Herefordshire - FOD & WV AREA	89	2	305	22	£15	£1
Tewkesbury - FOD & WV AREA	3	0	8	3	£0.5	£0.1
Full - FOD & WV AREA	517	12	1,732	181	£97	£8

Forest of Dean and Wye Valley - Staying visits



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

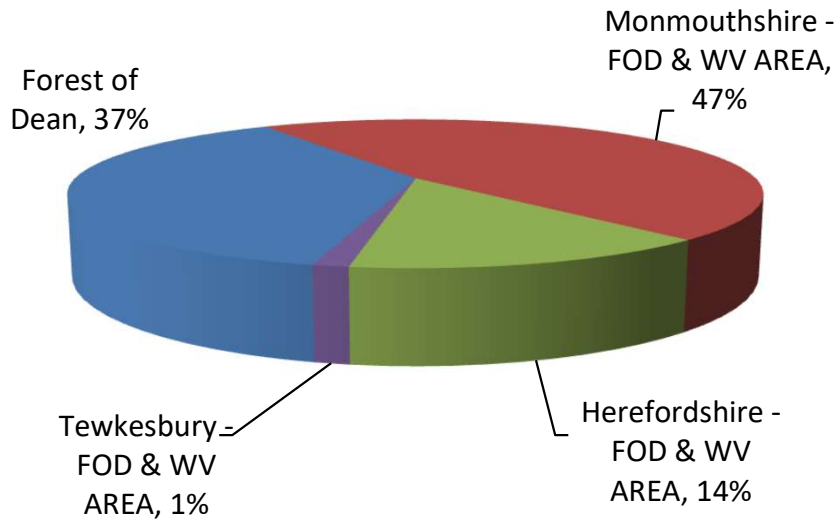
Forest of Dean and Wye Valley - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	148,500	359,800	£25,684,000
Self catering	117,200	555,000	£36,328,000
Touring caravans /tents	93,500	404,000	£12,598,000
Static vans/holiday centres	11,100	32,000	£1,927,000
Group/campus	14,000	36,000	£2,369,000
Paying guest in private homes	0	0	£0
Second homes	2,770	17,200	£684,000
Boat moorings	0	0	£0
Other	4,800	16,000	£888,000
Staying with friends and relatives	125,900	314,500	£16,810,000
Total	517,300	1,731,500	£97,290,000

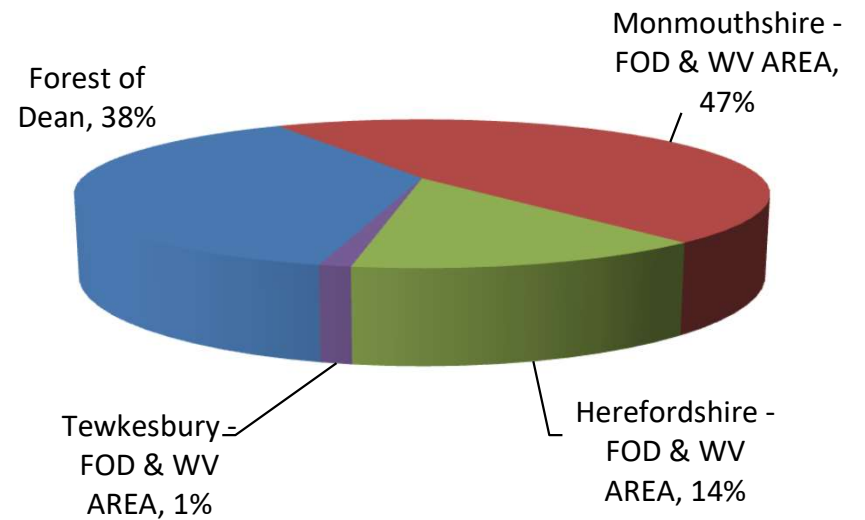
Overseas tourists	Trips	Nights	Spend
Serviced	2,100	8,100	£1,133,000
Self catering	700	12,000	£942,000
Touring caravans /tents	800	5,000	£197,000
Static vans/holiday centres	200	2,000	£139,000
Group/campus	800	39,000	£1,869,000
Paying guest in private homes	0	0	£0
Second homes	0	1,000	£49,000
Boat moorings	0	0	£0
Other	200	2,300	£173,000
Staying with friends and relatives	7,900	109,600	£3,106,000
Total	12,000	180,700	£7,607,000

Forest of Dean and Wye Valley - Day visits

All day visits



All day visit spend

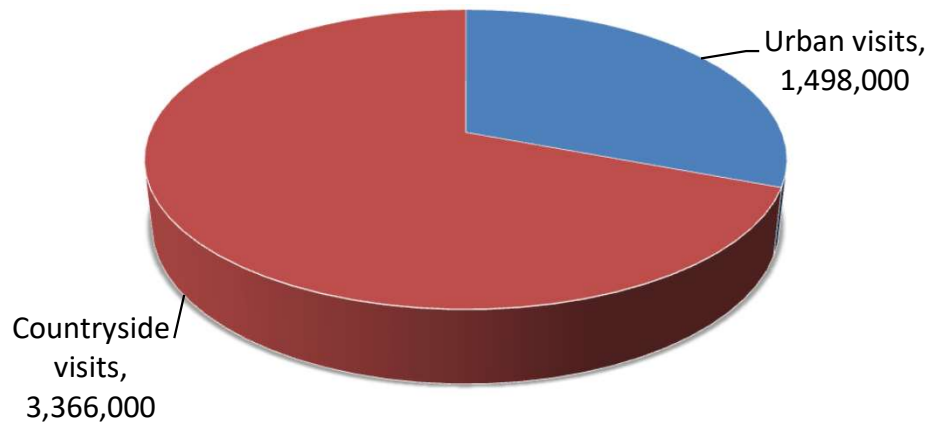


Area	Day visits	Day visit spend
Forest of Dean	1.8	£63.0
Monmouthshire - FOD & WV AREA	2.3	£78.5
Herefordshire - FOD & WV AREA	0.7	£23.1
Tewkesbury - FOD & WV AREA	0.07	£2.1
Full - FOD & WV AREA	4.9	£166.7

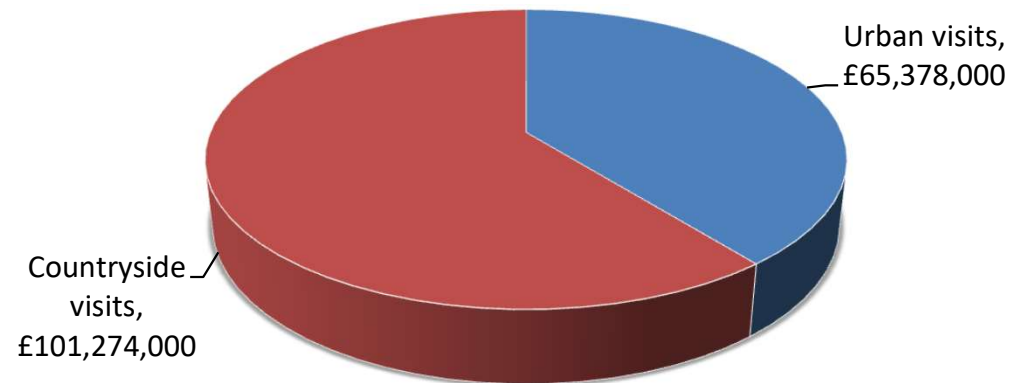
Forest of Dean and Wye Valley - Day visits by location

Total day visits	Total day visit spend
4,864,000	£166,652,000

Day visits



Day visit spend



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



Accommodation

- UK staying visitors £41,992,000
- Overseas staying visitors £2,331,000

Totals

£44,323,000 (16%)



Shopping

- UK staying visitors £12,477,000
- Overseas staying visitors £2,236,000
- Day visitors £50,942,000

£65,655,000 (24%)



Food & drink

- UK staying visitors £21,684,000
- Overseas staying visitors £1,693,000
- Day visitors £78,492,000

£101,869,000 (38%)



Attractions/entertainment

- UK staying visitors £8,012,000
- Overseas staying visitors £608,000
- Day visitors £18,390,000

£27,010,000 (10%)



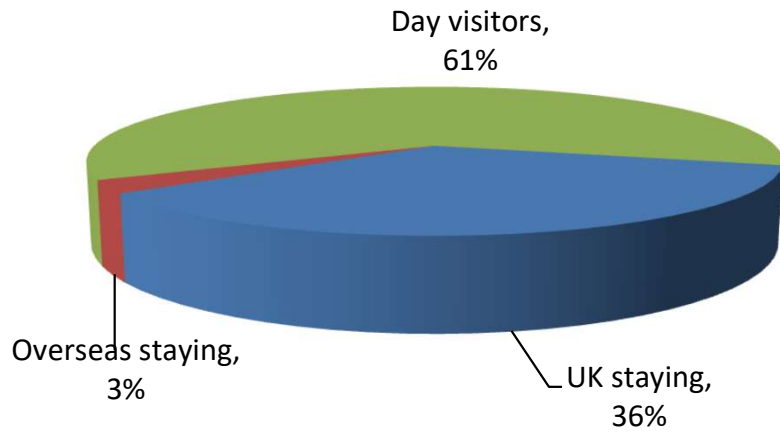
Travel

- UK staying visitors £13,123,000
- Overseas staying visitors £740,000
- Day visitors £18,828,000

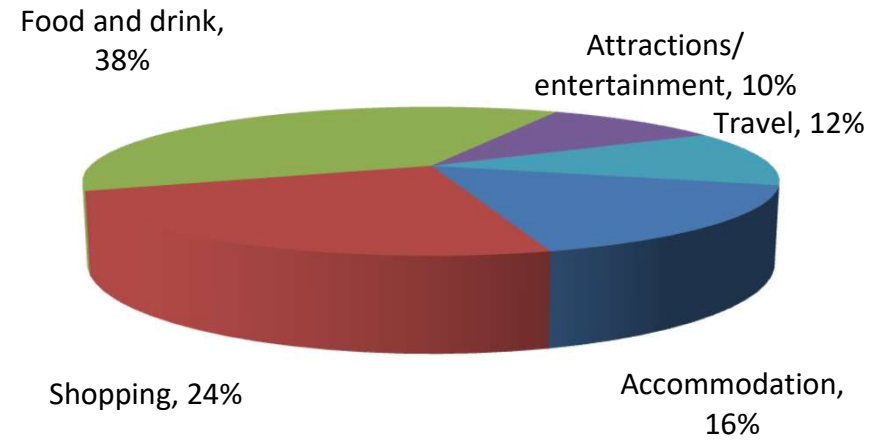
£32,691,000 (12%)

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

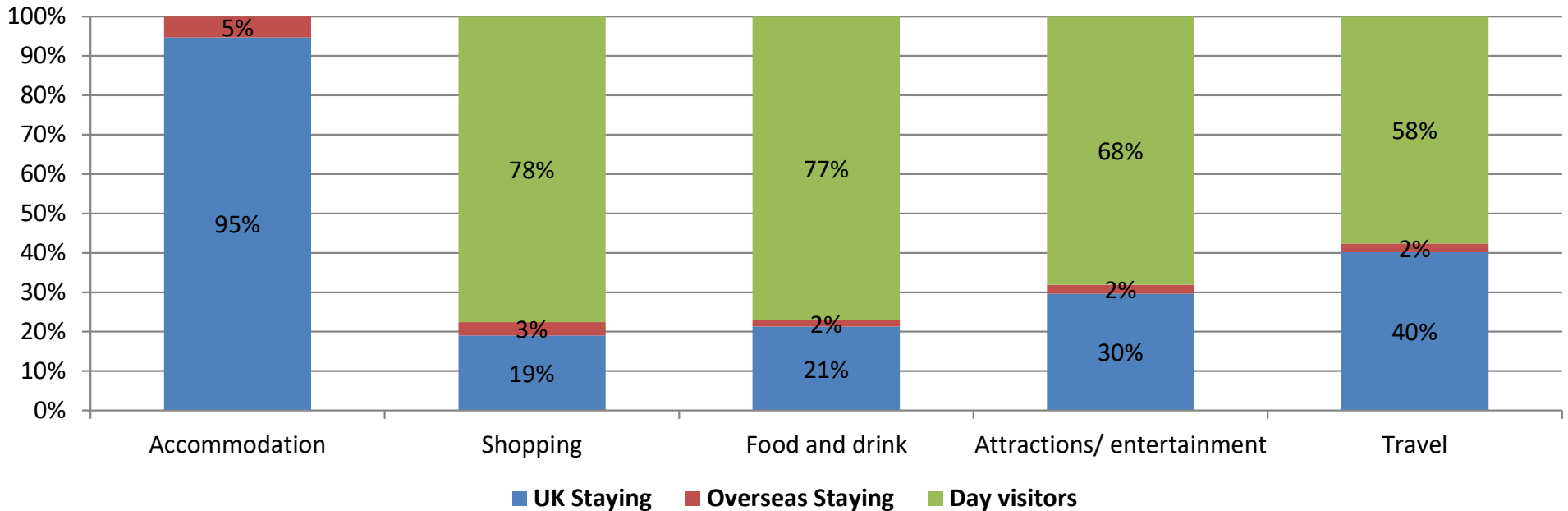
Spend by visitor type



Spend by sector



Spend by sector and visitor type



Forest of Dean and Wye Valley – Other visitor related expenditure



Second Homes

£108,000



Visiting friends and relatives (non-visitor spend)

£4,888,000

- 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	£44,788,000	£1,569,000	£46,357,000
Retailing	£14,568,000	£50,432,000	£65,000,000
Catering	£22,677,000	£76,137,000	£98,814,000
Attractions/entertainment	£9,002,000	£19,684,000	£28,686,000
Transport	£8,318,000	£11,296,000	£19,614,000
Arising from non trip spend	£4,996,000	£0	£4,996,000
Total Direct	£104,349,000	£159,118,000	£263,467,000

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£104,349,000	£159,118,000	£263,467,000
Supplier and income induced	£27,191,000	£29,556,000	£56,747,000
Total	£131,540,000	£188,674,000	£320,214,000

- 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	673	24	697
Retailing	120	415	535
Catering	287	962	1,249
Attractions/entertainment	148	323	471
Transport	53	72	125
Arising from non trip spend	75	0	75
Total Direct	1,355	1,796	3,151

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

Staying visitor measures % change compared to 2019	Trips	Nights	Spend
UK staying visitors	-28%	-15%	-14%
Overseas staying visitors	-88%	-76%	-85%
All staying visitors	-35%	-32%	-35%

Day visitor measures % change compared to 2019	Trips	Spend
Urban day visitors	-37%	-33%
Countryside day visitors	-13%	-8%
Coastal day visitors	0%	0%
All day visitors	-22%	-20%

Business turnover change compared to 2019	Staying visitor related	Day visitor related	Total visitor related
Value lost	-£73,517,000	-£43,212,000	-£116,729,000

Value of Tourism 2021

Forest of Dean

Key Facts	
210,000	Staying visitor trips
726,000	Staying visitor nights
£42,065,000	Staying visitor spend
1,819,000	Day visits
£62,988,000	Day visitor spend
£105,053,000	Direct visitor spend
£2,522,000	Other related spend
£107,575,000	TOTAL VISITOR RELATED SPEND
£124,725,000	TOTAL BUSINESS TURNOVER SUPPORTED
2,180	Estimated actual employment
1,559	FTE employment

Forest of Dean - Staying visits by accommodation type

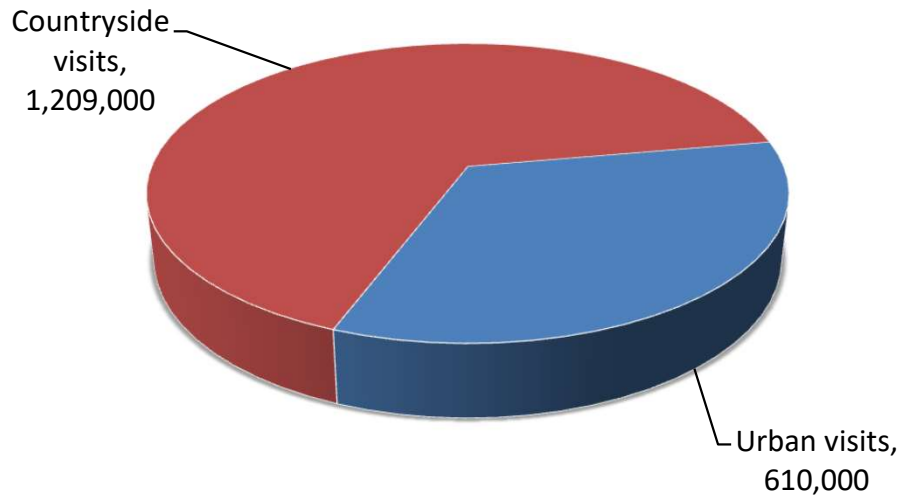
Domestic tourists	Trips	Nights	Spend
Serviced	31,200	62,000	£6,377,000
Self catering	57,500	206,000	£15,434,000
Touring caravans /tents	51,100	200,000	£6,806,000
Static vans/holiday centres	200	1,000	£39,000
Group/campus	9,900	23,000	£1,387,000
Paying guest in private homes	0	0	£0
Second homes	1,900	5,000	£271,000
Boat moorings	0	0	£0
Other	3,000	7,000	£419,000
Staying with friends and relatives	49,700	117,000	£6,991,000
Total	204,000	620,000	£37,725,000

Overseas tourists	Trips	Nights	Spend
Serviced	700	3,000	£357,000
Self catering	300	5,000	£265,000
Touring caravans /tents	400	2,000	£104,000
Static vans/holiday centres	0	0	£0
Group/campus	700	37,000	£1,717,000
Paying guest in private homes	0	0	£0
Second homes	0	1,000	£42,000
Boat moorings	0	0	£0
Other	200	2,000	£138,000
Staying with friends and relatives	4,100	55,000	£1,718,000
Total	6,000	106,000	£4,340,000

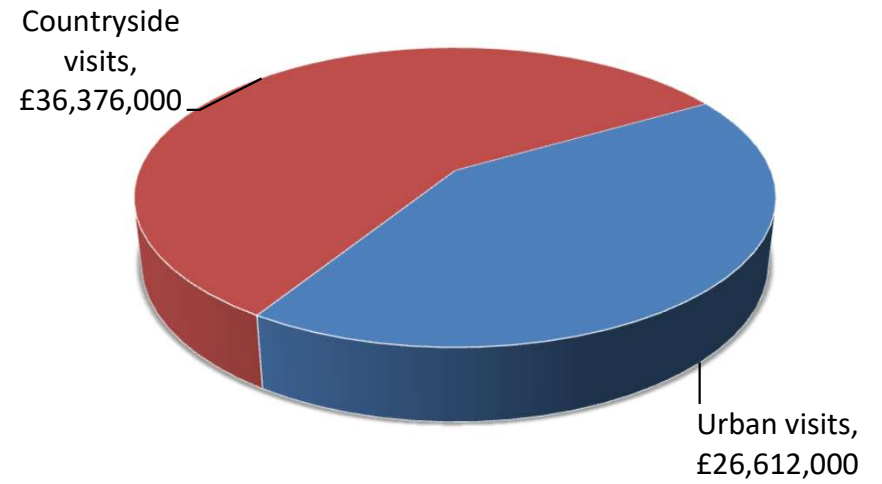
Forest of Dean - Day visits by location

Total day visits	Total day visit spend
1,819,000	£62,988,000

Day visits



Day visit spend



Forest of Dean – Direct visitor expenditure by category



Accommodation

- UK staying visitors £16,283,000
- Overseas staying visitors £1,329,000

Totals

£17,612,000 (17%)



Shopping

- UK staying visitors £4,838,000
- Overseas staying visitors £1,276,000
- Day visitors £19,662,000

£25,776,000 (25%)



Food & drink

- UK staying visitors £8,408,000
- Overseas staying visitors £966,000
- Day visitors £29,471,000

£38,845,000 (37%)



Attractions/entertainment

- UK staying visitors £3,107,000
- Overseas staying visitors £347,000
- Day visitors £6,831,000

£10,285,000 (10%)



Travel

- UK staying visitors £5,088,000
- Overseas staying visitors £422,000
- Day visitors £7,024,000

£12,534,000 (12%)

Forest of Dean – Other visitor related expenditure by category



Second Homes
£53,000



Visiting friends and relatives (non-visitor spend)
£2,469,000

- 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	£17,799,000	£589,000	£18,388,000
Retailing	£6,053,000	£19,466,000	£25,519,000
Catering	£9,093,000	£28,586,000	£37,679,000
Attractions/entertainment	£3,609,000	£7,323,000	£10,932,000
Transport	£3,306,000	£4,214,000	£7,520,000
Arising from non trip spend	£2,522,000	£0	£2,522,000
Total Direct	£42,382,000	£60,178,000	£102,560,000

*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	£42,382,000	£60,178,000	£102,560,000
Supplier and income induced	£11,045,000	£11,120,000	£22,165,000
Total	£53,427,000	£71,298,000	£124,725,000

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	268	9	276
Retailing	50	160	210
Catering	115	361	476
Attractions/entertainment	59	120	179
Transport	21	27	48
Arising from non trip spend	38	0	38
Total Direct	550	677	1,227

Forest of Dean – Impacts of Covid-19

Staying visitor measures % change compared to 2019	Trips	Nights	Spend
UK staying visitors	-24%	-11%	-11%
Overseas staying visitors	-85%	-69%	-81%
All staying visitors	-31%	-30%	-36%

Day visitor measures % change compared to 2019	Trips	Spend
Urban day visitors	-25%	-20%
Countryside day visitors	-22%	-18%
Coastal day visitors	0%	0%
All day visitors	-23%	-19%

Business turnover change compared to 2019	Staying visitor related	Day visitor related	Total visitor related
Value lost	-£29,466,000	-£15,571,000	-£45,037,000

Value of Tourism 2021

Herefordshire – (FOD & WV area)

Key Facts	
90,900	Staying visitor trips
327,000	Staying visitor nights
£15,629,000	Staying visitor spend
698,000	Day visits
£23,127,000	Day visitor spend
£38,756,000	Direct visitor spend
£153,000	Other related spend
£38,909,000	TOTAL VISITOR RELATED SPEND
£45,068,000	TOTAL BUSINESS TURNOVER SUPPORTED
793	Estimated actual employment
565	FTE employment

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

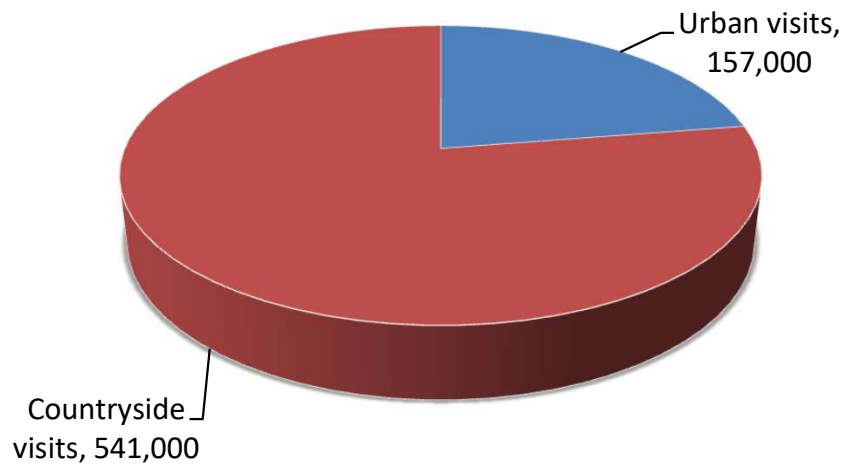
Domestic tourists	Trips	Nights	Spend
Serviced	53,800	142,000	£8,309,000
Self catering	16,700	87,000	£4,191,000
Touring caravans /tents	10,700	54,000	£1,253,000
Static vans/holiday centres	1,300	4,000	£281,000
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	200	1,000	£32,000
Boat moorings	0	0	£0
Other	700	2,000	£55,000
Staying with friends and relatives	5,600	16,000	£563,000
Total	89,000	305,000	£14,684,000

Overseas tourists	Trips	Nights	Spend
Serviced	600	3,000	£263,000
Self catering	200	5,000	£228,000
Touring caravans /tents	300	2,000	£80,000
Static vans/holiday centres	200	2,000	£139,000
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	0	0	£3,000
Boat moorings	0	0	£0
Other	0	300	£19,000
Staying with friends and relatives	600	10,000	£213,000
Total	1,900	22,000	£945,000

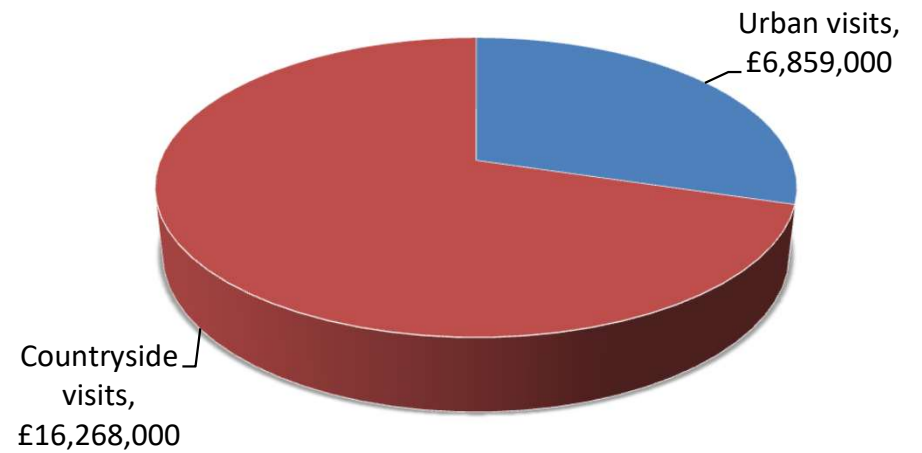
Herefordshire (FOD & WV area) - Day visits by location

Total day visits	Total day visit spend
698,000	£23,127,000

Day visits



Day visit spend



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



Accommodation

- UK staying visitors £6,338,000
- Overseas staying visitors £290,000

Totals

£6,628,000 (17%)



Shopping

- UK staying visitors £1,883,000
- Overseas staying visitors £278,000
- Day visitors £6,594,000

£8,755,000 (23%)



Food & drink

- UK staying visitors £3,273,000
- Overseas staying visitors £210,000
- Day visitors £11,121,000

£14,604,000 (38%)



Attractions/entertainment

- UK staying visitors £1,209,000
- Overseas staying visitors £76,000
- Day visitors £2,691,000

£3,976,000 (10%)



Travel

- UK staying visitors £1,981,000
- Overseas staying visitors £92,000
- Day visitors £2,720,000

£4,793,000 (12%)

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



Second Homes

£5,000



Visiting friends and relatives (non-visitor spend)

£148,000

- 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	£6,697,000	£222,000	£6,919,000
Retailing	£2,140,000	£6,528,000	£8,668,000
Catering	£3,379,000	£10,788,000	£14,167,000
Attractions/entertainment	£1,341,000	£2,868,000	£4,209,000
Transport	£1,244,000	£1,632,000	£2,876,000
Arising from non trip spend	£153,000	£0	£153,000
Total Direct	£14,954,000	£22,038,000	£36,992,000

*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	£14,954,000	£22,038,000	£36,992,000
Supplier and income induced	£3,915,000	£4,161,000	£8,076,000
Total	£18,869,000	£26,199,000	£45,068,000

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	101	3	104
Retailing	18	54	71
Catering	43	136	179
Attractions/entertainment	22	47	69
Transport	8	10	18
Arising from non trip spend	2	0	2
Total Direct	193	251	444

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

Staying visitor measures % change compared to 2019	Trips	Nights	Spend
UK staying visitors	-45%	-32%	-28%
Overseas staying visitors	-94%	-91%	-93%
All staying visitors	-53%	-53%	-53%

Day visitor measures % change compared to 2019	Trips	Spend
Urban day visitors	-43%	-39%
Countryside day visitors	-6%	-1%
Coastal day visitors	0%	0%
All day visitors	-18%	-17%

Business turnover change compared to 2019	Staying visitor related	Day visitor related	Total visitor related
Value lost	-£23,867,000	-£4,738,000	-£28,605,000

Value of Tourism 2021

Monmouthshire – (FOD & WV area)

Key Facts	
225,200	Staying visitor trips
849,000	Staying visitor nights
£46,584,000	Staying visitor spend
2,279,000	Day visits
£78,478,000	Day visitor spend
£125,062,000	Direct visitor spend
£2,229,000	Other related spend
£127,291,000	TOTAL VISITOR RELATED SPEND
£147,230,000	TOTAL BUSINESS TURNOVER SUPPORTED
2,571	Estimated actual employment
1,836	FTE employment

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

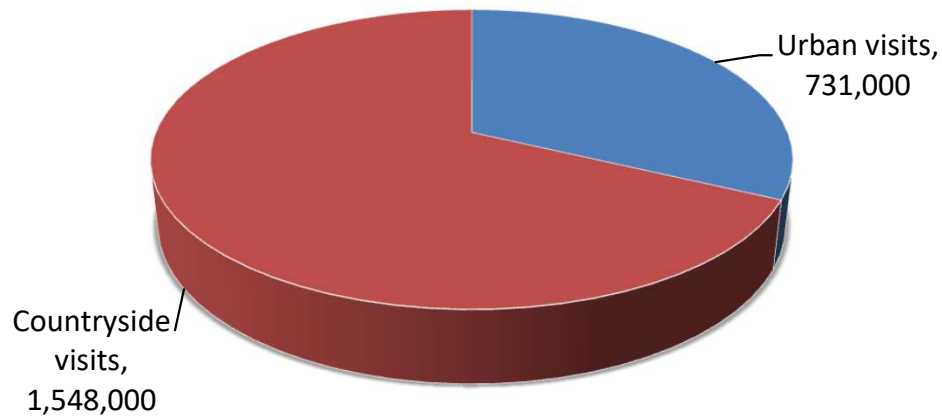
Domestic tourists	Trips	Nights	Spend
Serviced	62,600	154,000	£10,813,000
Self catering	43,000	262,000	£16,703,000
Touring caravans /tents	31,700	150,000	£4,539,000
Static vans/holiday centres	9,600	27,000	£1,607,000
Group/campus	4,100	13,000	£982,000
Paying guest in private homes	0	0	£0
Second homes	600	11,000	£371,000
Boat moorings	0	0	£0
Other	1,100	7,000	£414,000
Staying with friends and relatives	68,200	176,000	£8,925,000
Total	221,000	799,000	£44,355,000

Overseas tourists	Trips	Nights	Spend
Serviced	800	2,000	£503,000
Self catering	200	2,000	£449,000
Touring caravans /tents	100	1,000	£13,000
Static vans/holiday centres	0	0	£0
Group/campus	100	2,000	£152,000
Paying guest in private homes	0	0	£0
Second homes	0	0	£2,000
Boat moorings	0	0	£0
Other	0	0	£16,000
Staying with friends and relatives	3,000	42,000	£1,094,000
Total	4,200	50,000	£2,229,000

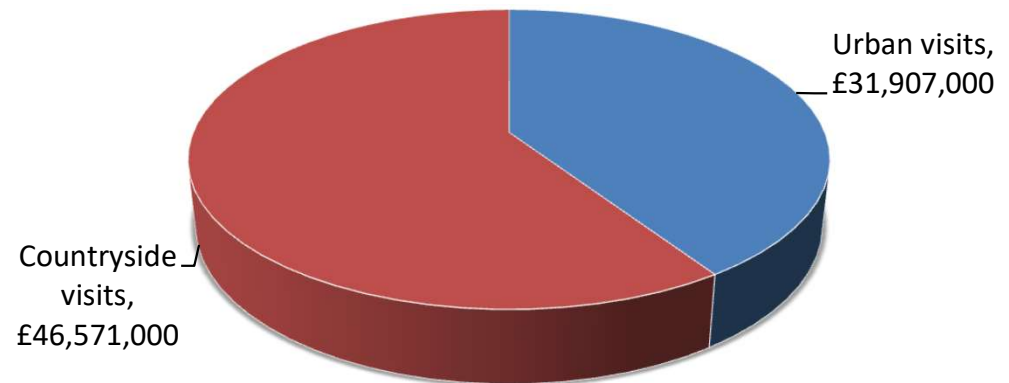
Monmouthshire (FOD & WV area) - Day visits by location

Total day visits	Total day visit spend
2,279,000	£78,478,000

Day visits



Day visit spend



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



Accommodation

- UK staying visitors £19,144,000
- Overseas staying visitors £683,000

Totals

£19,827,000 (16%)



Shopping

- UK staying visitors £5,689,000
- Overseas staying visitors £655,000
- Day visitors £24,230,000

£30,574,000 (24%)



Food & drink

- UK staying visitors £9,886,000
- Overseas staying visitors £496,000
- Day visitors £36,847,000

£47,229,000 (38%)



Attractions/entertainment

- UK staying visitors £3,653,000
- Overseas staying visitors £178,000
- Day visitors £8,590,000

£12,421,000 (10%)



Travel

- UK staying visitors £5,983,000
- Overseas staying visitors £217,000
- Day visitors £8,812,000

£15,012,000 (12%)

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



Second Homes

£49,000



Visiting friends and relatives (non-visitor spend)

£2,180,000

- 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	£20,034,000	£737,000	£20,771,000
Retailing	£6,281,000	£23,987,000	£30,268,000
Catering	£10,071,000	£35,742,000	£45,813,000
Attractions/entertainment	£3,999,000	£9,200,000	£13,199,000
Transport	£3,720,000	£5,287,000	£9,007,000
Arising from non trip spend	£2,229,000	£0	£2,229,000
Total Direct	£46,334,000	£74,953,000	£121,287,000

*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	£46,334,000	£74,953,000	£121,287,000
Supplier and income induced	£12,055,000	£13,888,000	£25,943,000
Total	£58,389,000	£88,841,000	£147,230,000

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	301	11	312
Retailing	52	197	249
Catering	127	452	579
Attractions/entertainment	66	151	217
Transport	24	34	57
Arising from non trip spend	33	0	33
Total Direct	603	845	1,447

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

Staying visitor measures % change compared to 2019	Trips	Nights	Spend
UK staying visitors	-22%	-9%	-10%
Overseas staying visitors	-85%	-70%	-82%
All staying visitors	-28%	-19%	-25%

Day visitor measures % change compared to 2019	Trips	Spend
Urban day visitors	-43%	-40%
Countryside day visitors	-5%	0%
Coastal day visitors	0%	0%
All day visitors	-22%	-21%

Business turnover change compared to 2019	Staying visitor related	Day visitor related	Total visitor related
Value lost	-£19,628,000	-£22,441,000	-£42,069,000

Value of Tourism 2021

Tewkesbury – (FOD & WV area)

Key Facts	
3,500	Staying visitor trips
10,200	Staying visitor nights
£619,000	Staying visitor spend
68,000	Day visits
£2,059,000	Day visitor spend
£2,678,000	Direct visitor spend
£92,000	Other related spend
£2,770,000	TOTAL VISITOR RELATED SPEND
£3,191,000	TOTAL BUSINESS TURNOVER SUPPORTED
56	Estimated actual employment
40	FTE employment

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

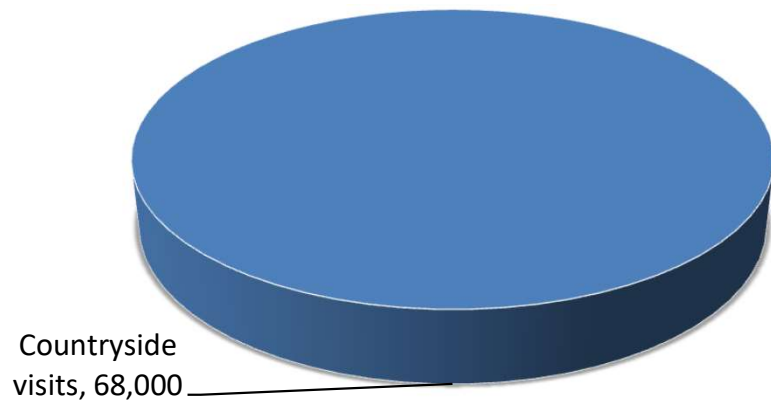
Domestic tourists	Trips	Nights	Spend
Serviced	900	1,800	£185,000
Self catering	0	0	£0
Touring caravans /tents	0	0	£0
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	70	200	£10,000
Boat moorings	0	0	£0
Other	0	0	£0
Staying with friends and relatives	2,400	5,500	£331,000
Total	3,300	7,500	£526,000

Overseas tourists	Trips	Nights	Spend
Serviced	0	100	£10,000
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	0	0	£2,000
Boat moorings	0	0	£0
Other	0	0	£0
Staying with friends and relatives	200	2,600	£81,000
Total	200	2,700	£93,000

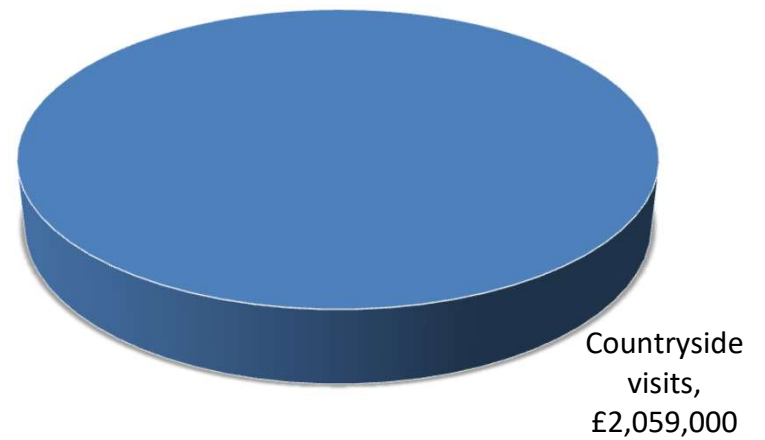
Tewkesbury (FOD & WV area) - Day visits by location

Total day visits	Total day visit spend
68,000	£2,059,000

Day visits



Day visit spend



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



Accommodation

- UK staying visitors £227,000
- Overseas staying visitors £29,000

Totals

£256,000 (10%)



Shopping

- UK staying visitors £67,000
- Overseas staying visitors £27,000
- Day visitors £456,000

£550,000 (21%)



Food & drink

- UK staying visitors £117,000
- Overseas staying visitors £21,000
- Day visitors £1,053,000

£1,191,000 (44%)



Attractions/entertainment

- UK staying visitors £43,000
- Overseas staying visitors £7,000
- Day visitors £278,000

£328,000 (12%)



Travel

- UK staying visitors £71,000
- Overseas staying visitors £9,000
- Day visitors £272,000

£352,000 (13%)

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



Second Homes

£1,000



Visiting friends and relatives (non-visitor spend)

£91,000

- 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	£258,000	£21,000	£279,000
Retailing	£94,000	£451,000	£545,000
Catering	£134,000	£1,021,000	£1,155,000
Attractions/entertainment	£53,000	£293,000	£346,000
Transport	£48,000	£163,000	£211,000
Arising from non trip spend	£92,000	£0	£92,000
Total Direct	£679,000	£1,949,000	£2,628,000

*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	£679,000	£1,949,000	£2,628,000
Supplier and income induced	£176,000	£387,000	£563,000
Total	£855,000	£2,336,000	£3,191,000

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	4	0	4
Retailing	1	4	4
Catering	2	13	15
Attractions/entertainment	1	5	6
Transport	0	1	1
Arising from non trip spend	1	0	1
Total Direct	9	23	32

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

Staying visitor measures % change compared to 2019	Trips	Nights	Spend
UK staying visitors	-43%	-40%	-18%
Overseas staying visitors	-78%	-58%	-77%
All staying visitors	-48%	-46%	-41%

Day visitor measures % change compared to 2019	Trips	Spend
Urban day visitors	0%	0%
Countryside day visitors	-23%	-18%
Coastal day visitors	0%	0%
All day visitors	-23%	-18%

Business turnover change compared to 2019	Staying visitor related	Day visitor related	Total visitor related
Value lost	-£556,000	-£462,000	-£1,018,000