

# The Economic Impact of Gloucestershire's Visitor Economy 2022

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



**December 2023**

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# Introduction

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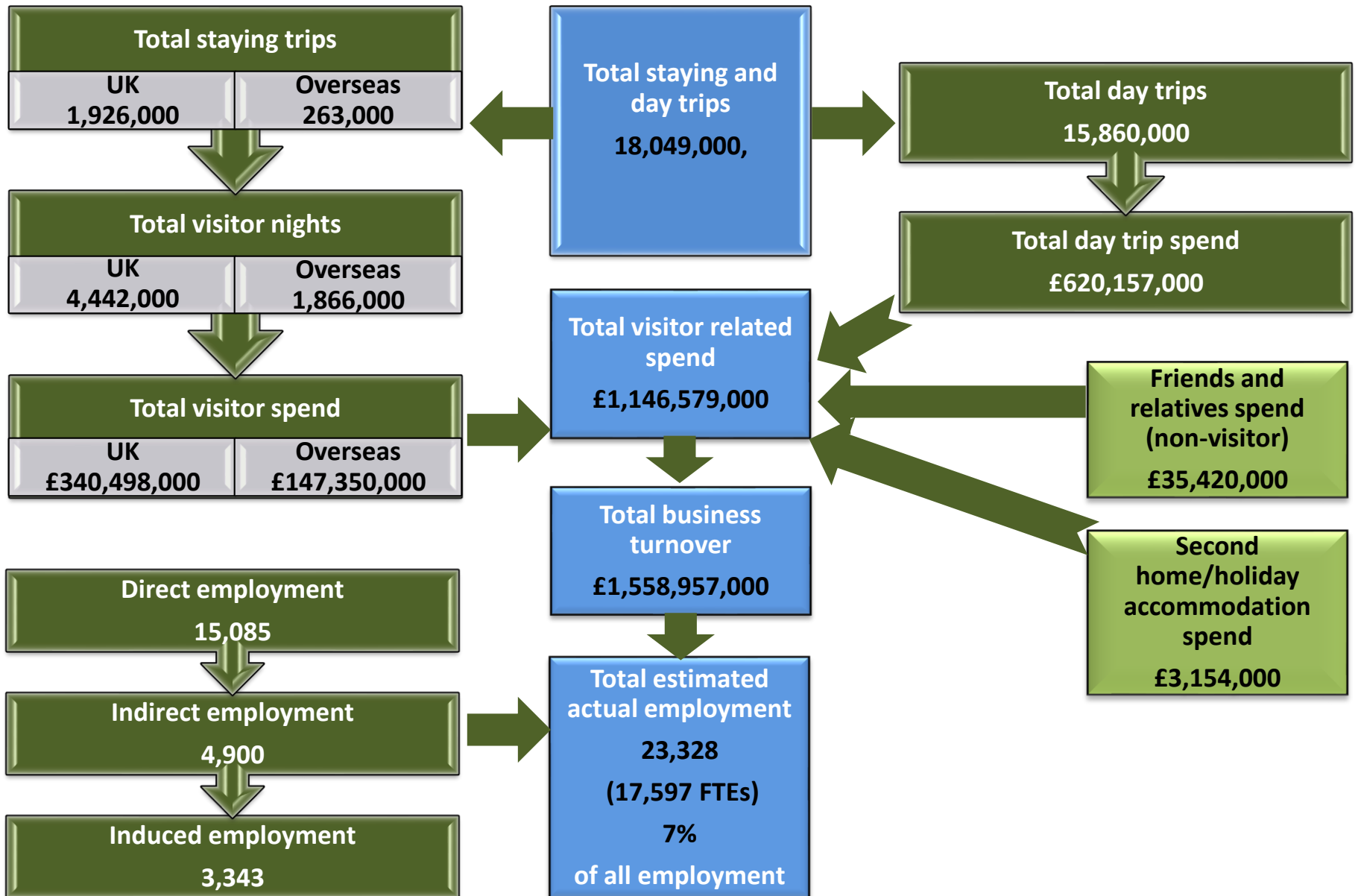
This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in Gloucestershire in 2022.

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 2022, including key facts about the economy, weather and key events please see Appendix 2 of this report.

# Gloucestershire - Key facts at a glance



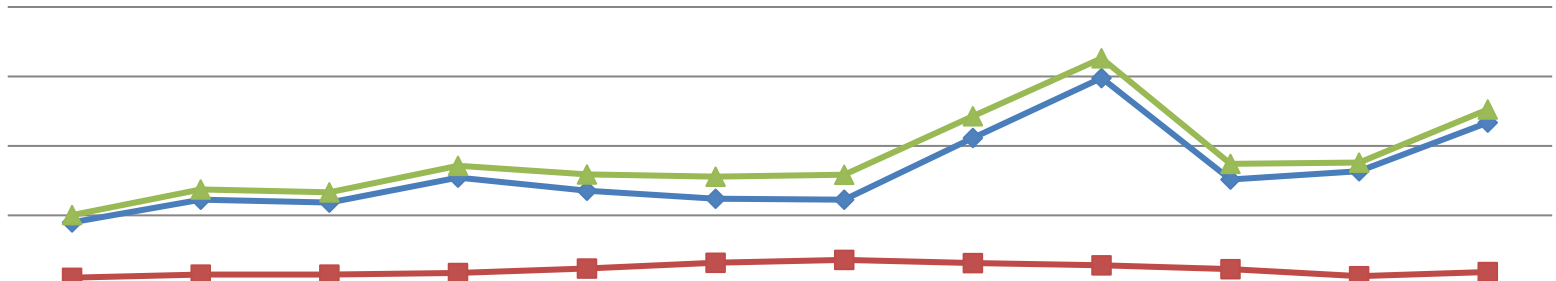
# Gloucestershire - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	590,000	980,000	£135,798,000
Self catering	337,000	1,003,000	£101,585,000
Touring caravans /tents	179,000	582,000	£26,739,000
Static vans/holiday centres	2,000	7,000	£559,000
Group/campus	25,000	52,000	£2,567,000
Paying guest in private homes	0	0	£0
Second homes	37,000	132,000	£3,788,000
Boat moorings	20,000	62,000	£4,247,000
Other	17,000	47,000	£3,689,000
Staying with friends and relatives	719,000	1,577,000	£61,525,000
<b>Total</b>	<b>1,926,000</b>	<b>4,442,000</b>	<b>£340,498,000</b>

Overseas tourists	Trips	Nights	Spend
Serviced	102,000	323,000	£54,611,000
Self catering	18,000	231,000	£15,037,000
Touring caravans /tents	12,000	48,000	£2,993,000
Static vans/holiday centres	0	0	£12,000
Group/campus	9,000	181,000	£12,948,000
Paying guest in private homes	4,000	57,000	£3,166,000
Second homes	5,000	76,000	£5,684,000
Boat moorings	0	0	£0
Other	16,000	46,000	£4,811,000
Staying with friends and relatives	97,000	904,000	£48,087,000
<b>Total</b>	<b>263,000</b>	<b>1,866,000</b>	<b>£147,350,000</b>

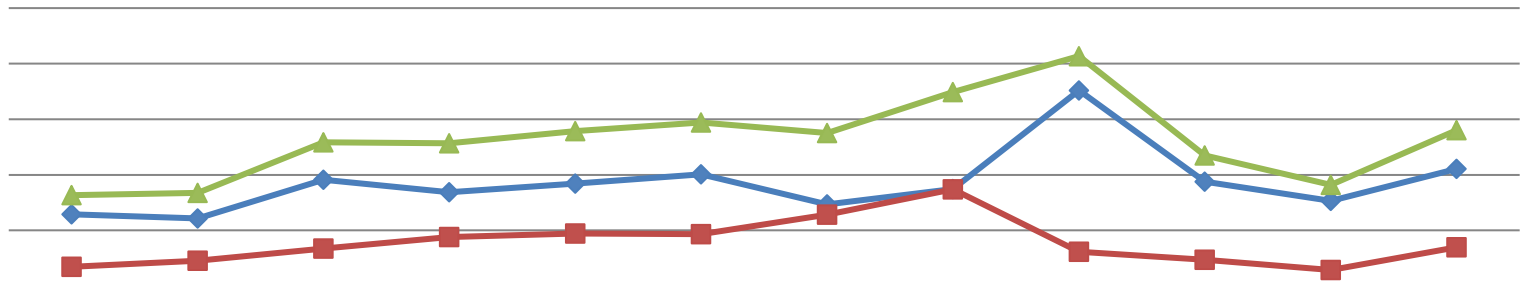
# Gloucestershire - Estimated seasonality of staying visits

## Seasonality - trips



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK trips (000's)	90.1	122.6	118.5	154.5	135.4	123.9	122.7	211.5	297.9	151.7	163.8	233.6
OS trips (000's)	10.4	15.0	14.8	17.0	23.8	31.9	36.1	31.5	28.3	22.7	12.6	18.8
Total trips (000's)	100.5	137.5	133.4	171.5	159.3	155.8	158.7	243.0	326.2	174.4	176.3	252.4

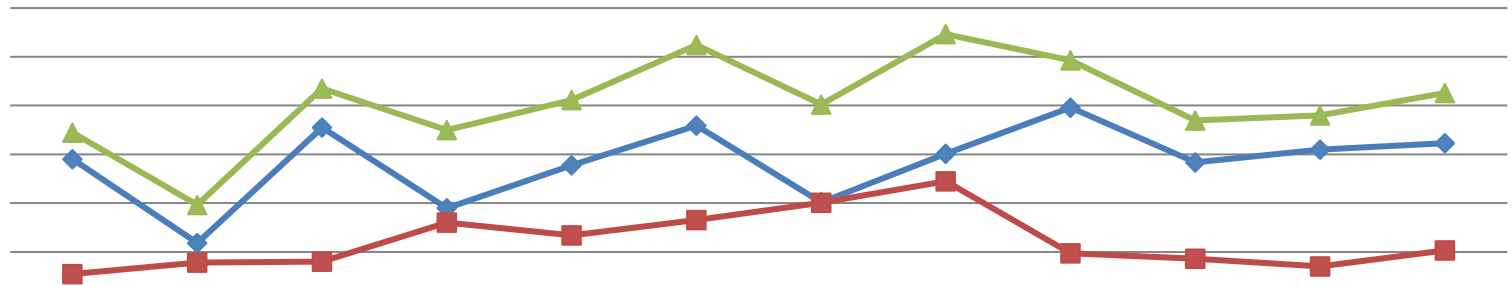
## Seasonality - nights



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK nights (000's)	258.1	243.2	382.7	337.5	368.3	401.4	294.1	349.4	703.9	375.4	306.5	421.5
OS nights (000's)	68.8	91.6	134.8	176.1	188.5	186.8	256.4	348.1	123.4	94.5	57.7	139.3
Total nights (000's)	326.9	334.8	517.5	513.6	556.8	588.1	550.5	697.6	827.3	469.9	364.2	560.8

# Gloucestershire - Estimated seasonality of staying visits

Seasonality - spend

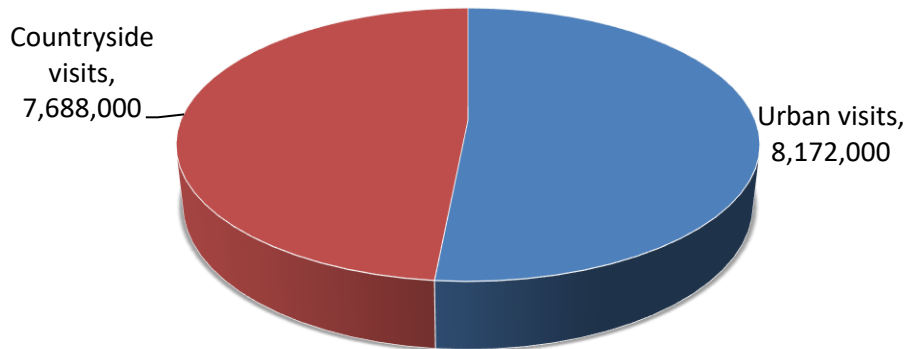


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK spend (mn's)	29.0	11.8	35.5	19.0	27.8	35.9	20.2	30.1	39.6	28.4	31.0	32.3
OS spend (mn's)	5.5	7.8	8.0	16.0	13.4	16.5	20.1	24.5	9.7	8.6	7.0	10.3
Total spend (mn's)	34.5	19.6	43.5	35.0	41.1	52.4	40.2	54.6	49.3	36.9	38.0	42.6

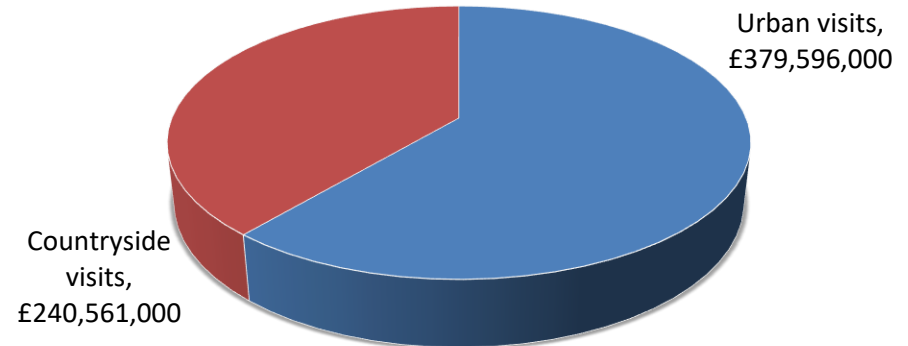
# Gloucestershire - Day visits by location

Total day visits	Total day visit spend
15,860,000	£620,157,000

Day visits



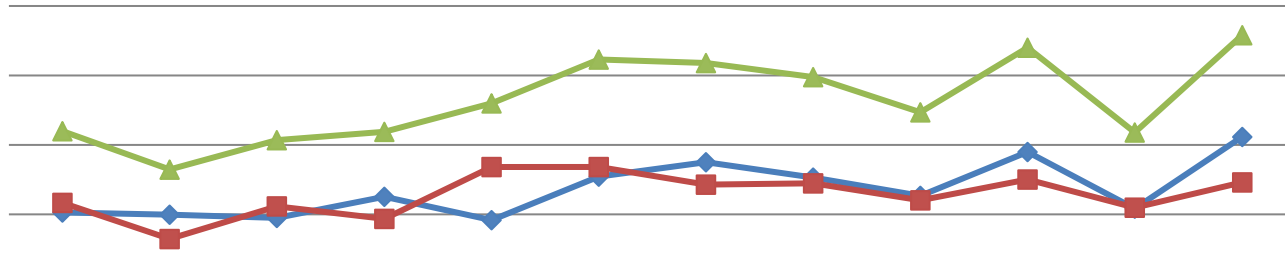
Day visit spend





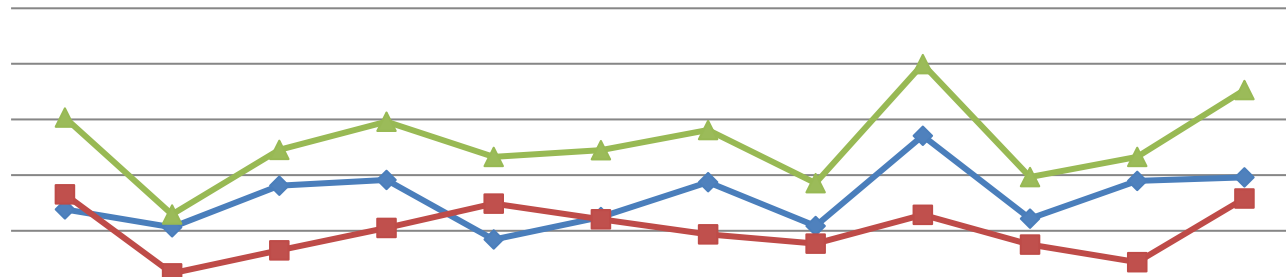
# Gloucestershire - Estimated seasonality of day visits

Seasonality - day visits (000's)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban(000's)	513.7	499.4	476.1	627.3	459.1	772.4	875.4	765.5	633.8	949.3	541.1	1058.8
Rural (000's)	584.5	324.1	558.5	467.9	841.2	841.7	715.5	723.7	600.9	750.6	547.9	731.5
Total (000's)	1098.2	823.5	1034.7	1095.2	1300.3	1614.1	1590.8	1489.2	1234.7	1699.9	1089.0	1790.3

Seasonality - day visit spend (millions)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban (mn)	27.6	21.2	36.1	38.3	16.8	24.9	37.5	21.7	54.1	24.3	37.9	39.1
Rural (mn)	33.1	4.7	13.0	21.0	29.7	24.1	18.7	15.4	25.8	15.0	8.6	31.5
Total (mn)	60.8	25.8	49.1	59.3	46.5	49.0	56.2	37.1	79.9	39.3	46.6	70.7

# Gloucestershire - Direct visitor expenditure by category

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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



## Accommodation

- UK staying visitors £121,613,000
- Overseas staying visitors £38,846,000

Totals

**£160,459,000 (14%)**



## Shopping

- UK staying visitors £48,038,000
- Overseas staying visitors £47,644,000
- Day visitors £230,951,000

**£326,633,000 (29%)**



## Food & drink

- UK staying visitors £68,302,000
- Overseas staying visitors £29,515,000
- Day visitors £227,468,000

**£325,285,000 (29%)**



## Attractions/entertainment

- UK staying visitors £33,655,000
- Overseas staying visitors £14,317,000
- Day visitors £71,843,000

**£119,635,000 (11%)**



## Travel

- UK staying visitors £68,889,000
- Overseas staying visitors £17,207,000
- Day visitors £89,895,000

**£175,991,000 (16%)**

## Gloucestershire – Other visitor related expenditure by category



Second Homes  
£1,959,000



Boats  
£1,195,000



Visiting friends and relatives (non-visitor spend)  
£35,420,000

- 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	£162,416,000	£4,549,000	£166,965,000
Retailing	£94,725,000	£228,641,000	£323,366,000
Catering	£94,883,000	£220,644,000	£315,527,000
Attractions/entertainment	£49,727,000	£76,427,000	£126,154,000
Transport	£51,658,000	£53,937,000	£105,595,000
Arising from non trip spend	£38,574,000	£0	£38,574,000
<b>Total Direct</b>	<b>£491,983,000</b>	<b>£584,198,000</b>	<b>£1,076,181,000</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	£491,983,000	£584,198,000	£1,076,181,000
Supplier and income induced	£249,223,000	£233,553,000	£482,776,000
<b>Total</b>	<b>£741,206,000</b>	<b>£817,751,000</b>	<b>£1,558,957,000</b>

# Gloucestershire – Tourism related employment

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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

## 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	1,848	52	1,899
Retailing	621	1,499	2,120
Catering	1,004	2,335	3,339
Attractions/entertainment	736	1,131	1,867
Transport	276	288	564
Arising from non trip spend	578	0	578
<b>Total Direct</b>	<b>5,062</b>	<b>5,304</b>	<b>10,367</b>

# District data



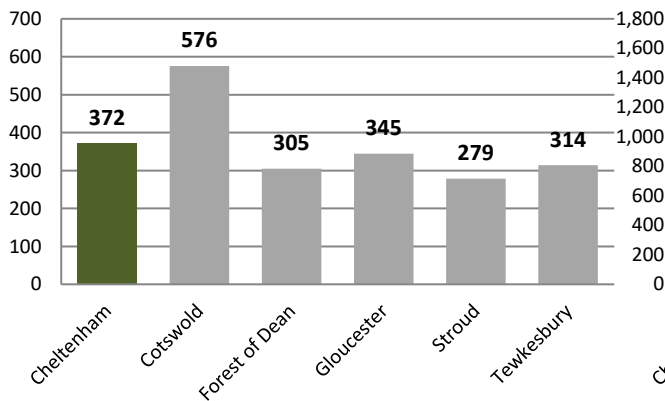
# Value of Tourism 2022

## Cheltenham

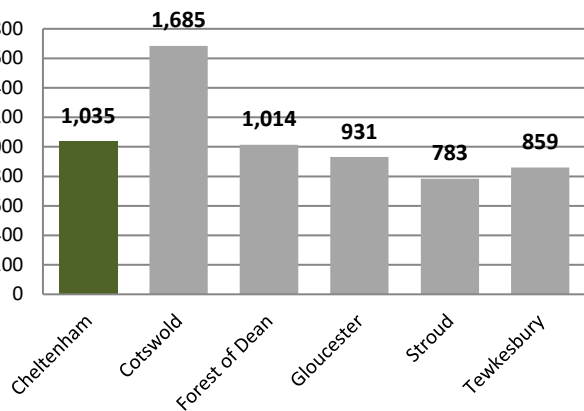
Key Facts	
371,800	Staying visitor trips
1,035,000	Staying visitor nights
£83,579,000	Staying visitor spend
1,607,000	Day visits
£73,451,000	Day visitor spend
£157,030,000	Direct visitor spend
£6,761,000	Other related spend
£163,791,000	TOTAL VISITOR RELATED SPEND
£205,856,000	TOTAL BUSINESS TURNOVER SUPPORTED
2,875	Estimated actual employment
2,146	FTE employment
4%	Proportion of all employment

# Cheltenham - Staying visits in the county context

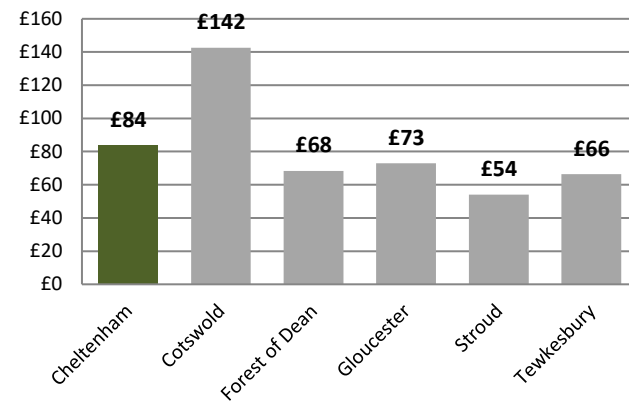
All staying trips



All staying nights



All staying spend



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	326	46	724	311	£59	£25
Cotswold	512	64	1,236	449	£104	£39
Forest of Dean	270	35	683	331	£45	£23
Gloucester	299	46	633	298	£49	£24
Stroud	244	35	542	241	£36	£18
Tewkesbury	276	38	624	235	£47	£19

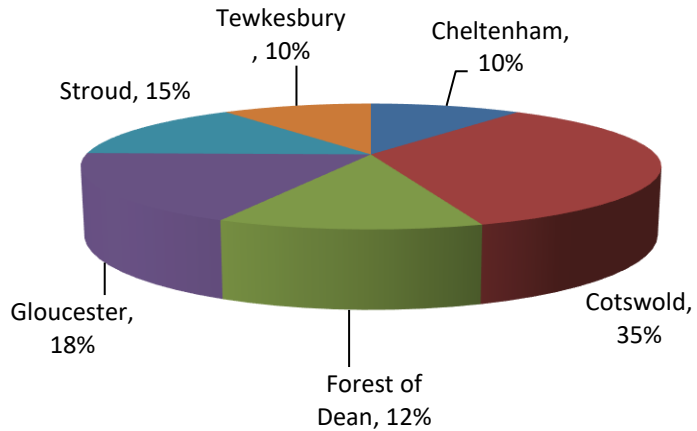
# Cheltenham - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	113,600	189,000	£26,133,000
Self catering	60,100	179,000	£18,157,000
Touring caravans /tents	11,900	39,000	£1,775,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	6,600	23,000	£670,000
Boat moorings	0	0	£0
Other	3,100	8,000	£668,000
Staying with friends and relatives	130,300	286,000	£11,141,000
<b>Total</b>	<b>325,500</b>	<b>724,000</b>	<b>£58,544,000</b>

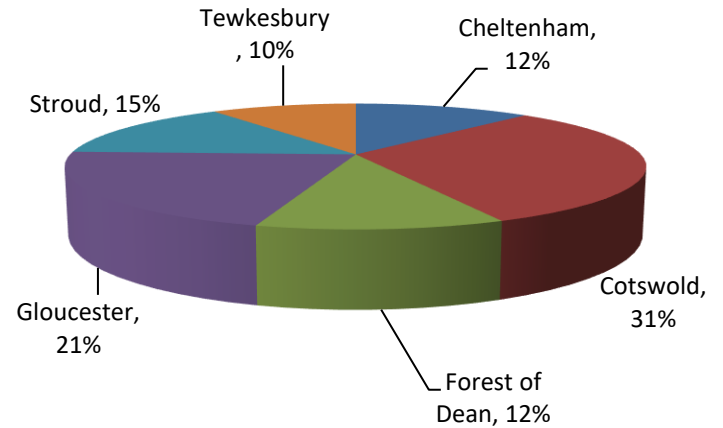
Overseas tourists	Trips	Nights	Spend
Serviced	19,600	62,000	£10,509,000
Self catering	3,200	41,000	£2,688,000
Touring caravans /tents	800	3,000	£199,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	1,300	19,000	£1,055,000
Second homes	900	13,000	£1,005,000
Boat moorings	0	0	£0
Other	2,900	8,000	£871,000
Staying with friends and relatives	17,600	164,000	£8,708,000
<b>Total</b>	<b>46,300</b>	<b>311,000</b>	<b>£25,035,000</b>

# Cheltenham - Day visits in the county context

**All day visits**



**All day visit spend**

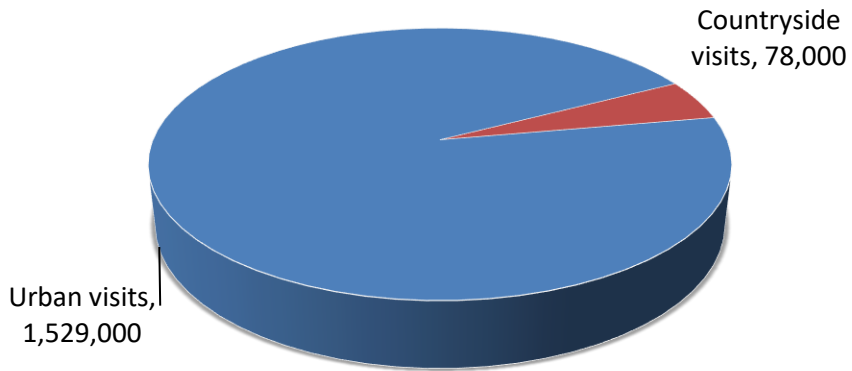


Area	Day visits	Day visit spend
Cheltenham	1.6	£73.5
Cotswold	5.5	£193.5
Forest of Dean	2.0	£71.7
Gloucester	2.9	£130.9
Stroud	2.3	£90.2
Tewkesbury	1.6	£60.4

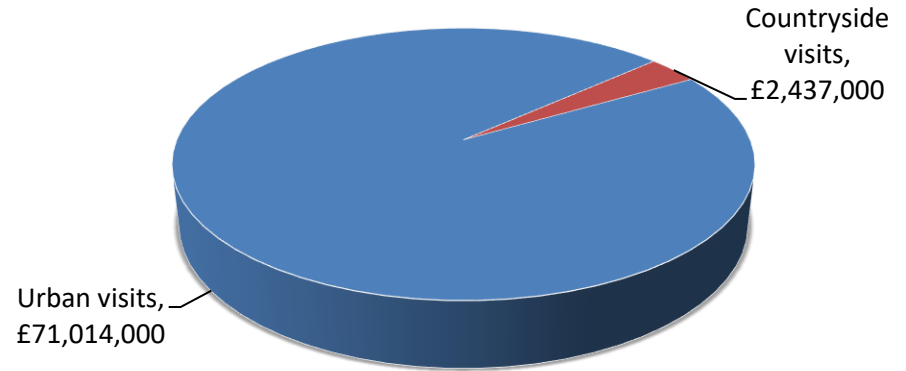
# Cheltenham - Day visits by location

Total day visits	Total day visit spend
1,607,000	£73,451,000

Day visits



Day visit spend



# Cheltenham – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £20,910,000
- Overseas staying visitors £6,600,000

Totals

**£27,510,000 (18%)**



## Shopping

- UK staying visitors £8,259,000
- Overseas staying visitors £8,095,000
- Day visitors £33,777,000

**£50,131,000 (32%)**



## Food & drink

- UK staying visitors £11,744,000
- Overseas staying visitors £5,015,000
- Day visitors £24,740,000

**£41,499,000 (26%)**



## Attractions/entertainment

- UK staying visitors £5,786,000
- Overseas staying visitors £2,402,000
- Day visitors £6,544,000

**£14,732,000 (9%)**



## Travel

- UK staying visitors £11,845,000
- Overseas staying visitors £2,924,000
- Day visitors £8,389,000

**£23,158,000 (15%)**

## Cheltenham – Other visitor related expenditure by category



Second Homes

£347,000



Visiting friends and relatives (non-visitor spend)

£6,414,000

- 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	£27,845,000	£495,000	£28,340,000
Retailing	£16,191,000	£33,439,000	£49,630,000
Catering	£16,255,000	£23,998,000	£40,253,000
Attractions/entertainment	£8,520,000	£7,130,000	£15,650,000
Transport	£8,861,000	£5,034,000	£13,895,000
Arising from non trip spend	£6,761,000	£0	£6,761,000
<b>Total Direct</b>	<b>£84,433,000</b>	<b>£70,096,000</b>	<b>£154,529,000</b>

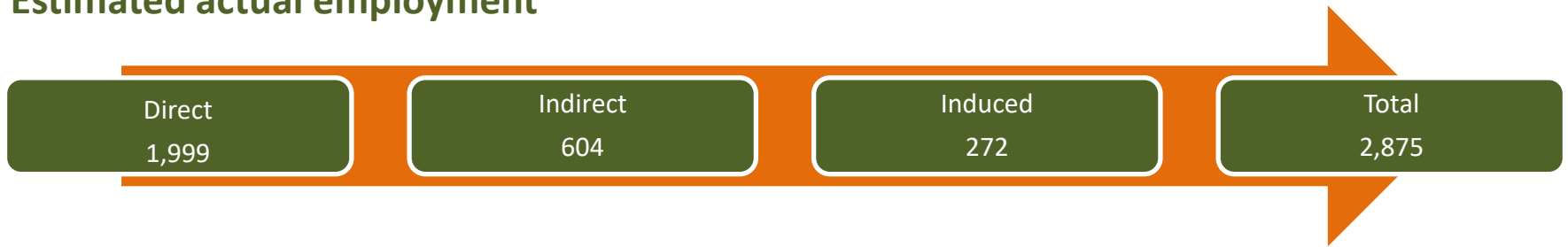
\*Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£84,433,000	£70,096,000	£154,529,000
Supplier and income induced	£32,349,000	£18,978,000	£51,327,000
<b>Total</b>	<b>£116,782,000</b>	<b>£89,074,000</b>	<b>£205,856,000</b>



# 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	293	5	298
Retailing	98	203	301
Catering	159	235	394
Attractions/entertainment	117	98	214
Transport	44	25	69
Arising from non trip spend	101	0	101
<b>Total Direct</b>	<b>812</b>	<b>566</b>	<b>1,378</b>

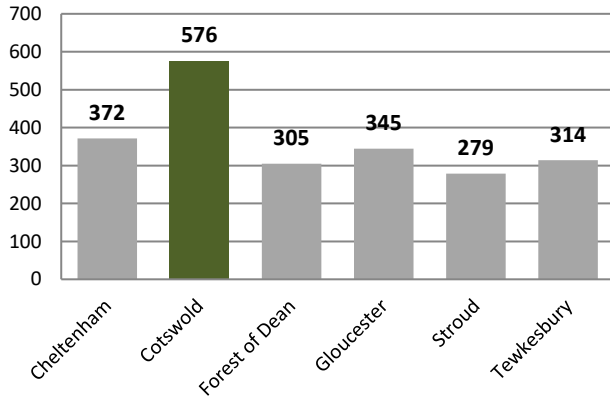
# Value of Tourism 2022

## Cotswold

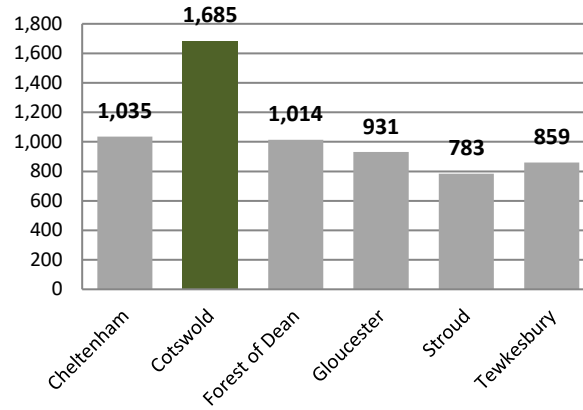
Key Facts	
576,000	Staying visitor trips
1,685,000	Staying visitor nights
£142,492,000	Staying visitor spend
5,502,000	Day visits
£193,516,000	Day visitor spend
£336,008,000	Direct visitor spend
£6,253,000	Other related spend
£342,261,000	TOTAL VISITOR RELATED SPEND
£382,870,000	TOTAL BUSINESS TURNOVER SUPPORTED
6,153	Estimated actual employment
4,417	FTE employment
13%	Proportion of all employment

# Cotswold - Staying visits in the county context

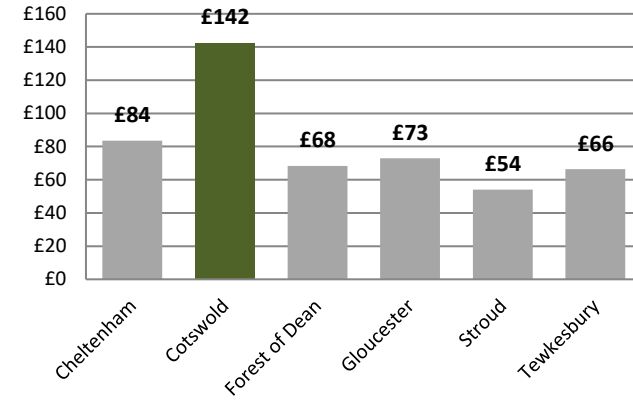
All staying trips



All staying nights



All staying spend



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	326	46	724	311	£59	£25
Cotswold	512	64	1,236	449	£104	£39
Forest of Dean	270	35	683	331	£45	£23
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Stroud	244	35	542	241	£36	£18
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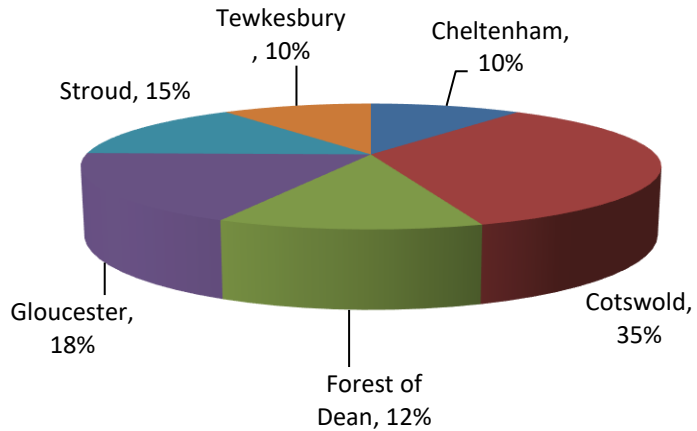
## Cotswold - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	174,600	290,000	£40,183,000
Self catering	135,400	404,000	£40,876,000
Touring caravans /tents	64,500	210,000	£9,641,000
Static vans/holiday centres	1,700	5,000	£413,000
Group/campus	8,200	17,000	£843,000
Paying guest in private homes	0	0	£0
Second homes	19,700	70,000	£2,010,000
Boat moorings	3,700	12,000	£782,000
Other	2,400	7,000	£520,000
Staying with friends and relatives	101,400	222,000	£8,673,000
<b>Total</b>	<b>512,000</b>	<b>1,236,000</b>	<b>£103,941,000</b>

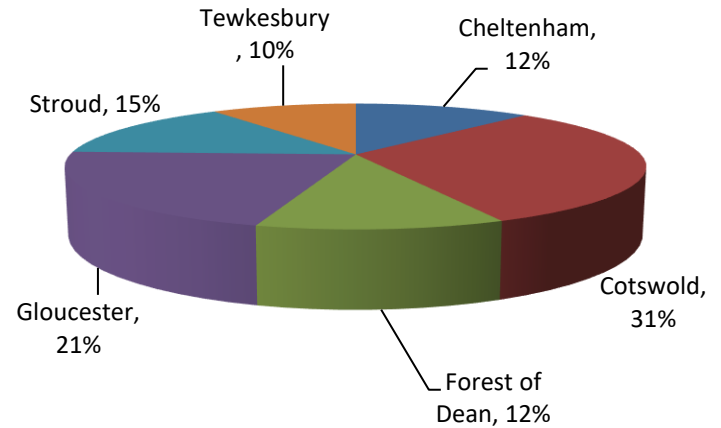
Overseas tourists	Trips	Nights	Spend
Serviced	30,200	96,000	£16,160,000
Self catering	7,200	93,000	£6,051,000
Touring caravans /tents	4,300	17,000	£1,079,000
Static vans/holiday centres	0	0	£9,000
Group/campus	3,000	59,000	£4,253,000
Paying guest in private homes	700	10,000	£528,000
Second homes	2,700	40,000	£3,016,000
Boat moorings	0	0	£0
Other	2,300	6,000	£678,000
Staying with friends and relatives	13,700	127,000	£6,778,000
<b>Total</b>	<b>64,000</b>	<b>449,000</b>	<b>£38,551,000</b>

# Cotswold - Day visits in the county context

**All day visits**



**All day visit spend**

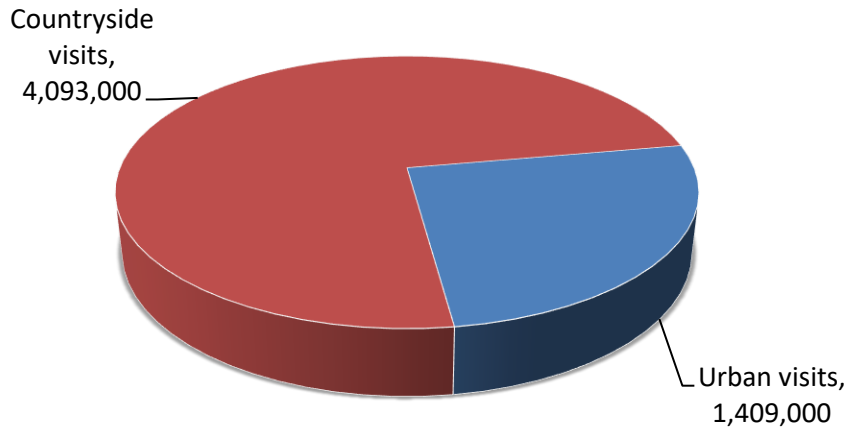


Area	Day visits	Day visit spend
Cheltenham	1.6	£73.5
Cotswold	5.5	£193.5
Forest of Dean	2.0	£71.7
Gloucester	2.9	£130.9
Stroud	2.3	£90.2
Tewkesbury	1.6	£60.4

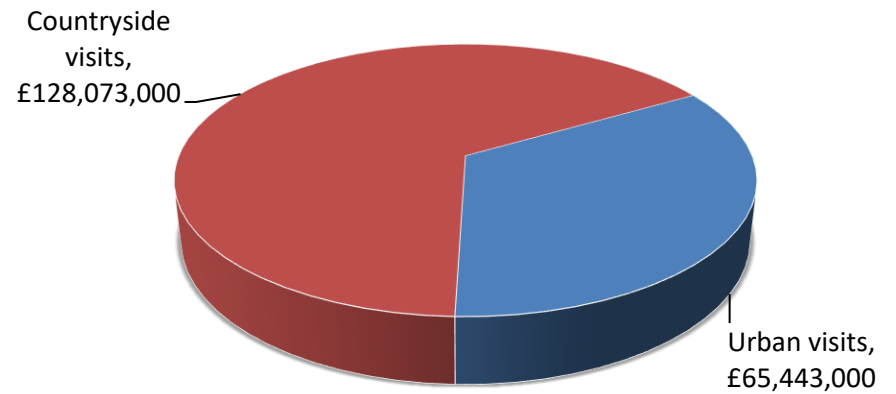
# Cotswold - Day visits by location

Total day visits	Total day visit spend
5,502,000	£193,516,000

Day visits



Day visit spend



# Cotswold – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £37,124,000
- Overseas staying visitors £10,163,000

Totals

**£47,287,000 (14%)**



## Shopping

- UK staying visitors £14,664,000
- Overseas staying visitors £12,465,000
- Day visitors £58,998,000

**£86,127,000 (26%)**



## Food & drink

- UK staying visitors £20,850,000
- Overseas staying visitors £7,722,000
- Day visitors £75,458,000

**£104,030,000 (31%)**



## Attractions/entertainment

- UK staying visitors £10,274,000
- Overseas staying visitors £3,699,000
- Day visitors £26,415,000

**£40,388,000 (12%)**



## Travel

- UK staying visitors £21,029,000
- Overseas staying visitors £4,502,000
- Day visitors £32,645,000

**£58,176,000 (17%)**

## Cotswold – Other visitor related expenditure by category



Second Homes

£1,040,000



Boats

£220,000



Visiting friends and relatives (non-visitor spend)

£4,993,000

- 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	£47,858,000	£1,509,000	£49,367,000
Retailing	£26,858,000	£58,408,000	£85,266,000
Catering	£27,715,000	£73,194,000	£100,909,000
Attractions/entertainment	£14,529,000	£27,760,000	£42,289,000
Transport	£15,319,000	£19,587,000	£34,906,000
Arising from non trip spend	£6,253,000	£0	£6,253,000
<b>Total Direct</b>	<b>£138,532,000</b>	<b>£180,458,000</b>	<b>£318,990,000</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	£138,532,000	£180,458,000	£318,990,000
Supplier and income induced	£32,293,000	£31,587,000	£63,880,000
<b>Total</b>	<b>£170,825,000</b>	<b>£212,045,000</b>	<b>£382,870,000</b>

# 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	611	19	630
Retailing	198	430	627
Catering	329	869	1,198
Attractions/entertainment	241	461	702
Transport	92	117	209
Arising from non trip spend	94	0	94
<b>Total Direct</b>	<b>1,564</b>	<b>1,896</b>	<b>3,460</b>

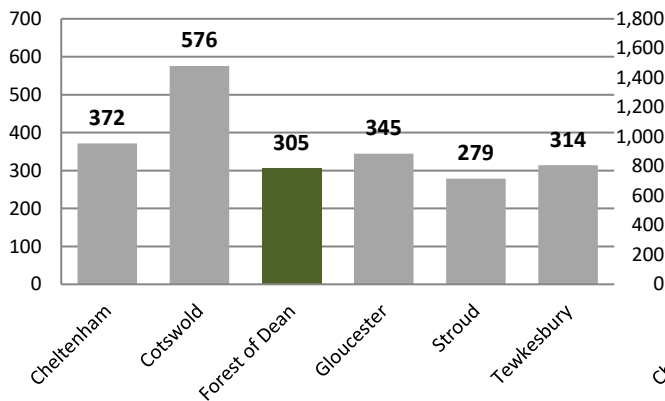
# Value of Tourism 2022

## Forest of Dean

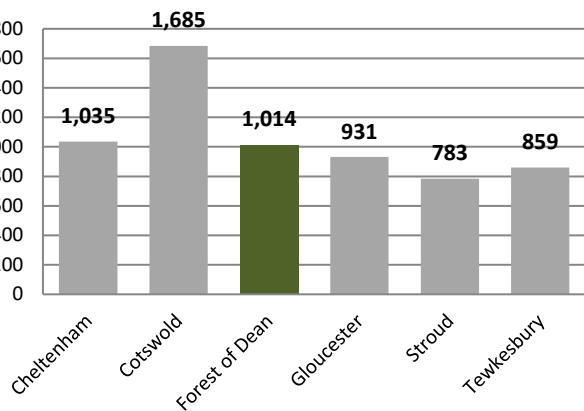
Key Facts	
305,000	Staying visitor trips
1,014,000	Staying visitor nights
£68,366,000	Staying visitor spend
1,962,000	Day visits
£71,713,000	Day visitor spend
£140,079,000	Direct visitor spend
£4,948,000	Other related spend
£145,027,000	TOTAL VISITOR RELATED SPEND
£162,900,000	TOTAL BUSINESS TURNOVER SUPPORTED
2,514	Estimated actual employment
1,816	FTE employment
7%	Proportion of all employment

# Forest of Dean - Staying visits in the county context

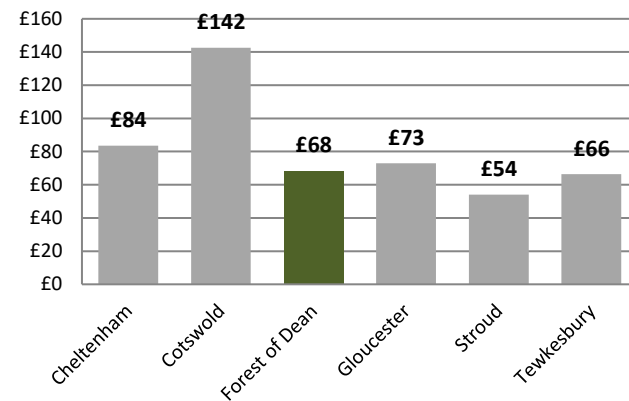
### All staying trips



### All staying nights



### All staying spend



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	326	46	724	311	£59	£25
Cotswold	512	64	1,236	449	£104	£39
Forest of Dean	270	35	683	331	£45	£23
Gloucester	299	46	633	298	£49	£24
Stroud	244	35	542	241	£36	£18
Tewkesbury	276	38	624	235	£47	£19

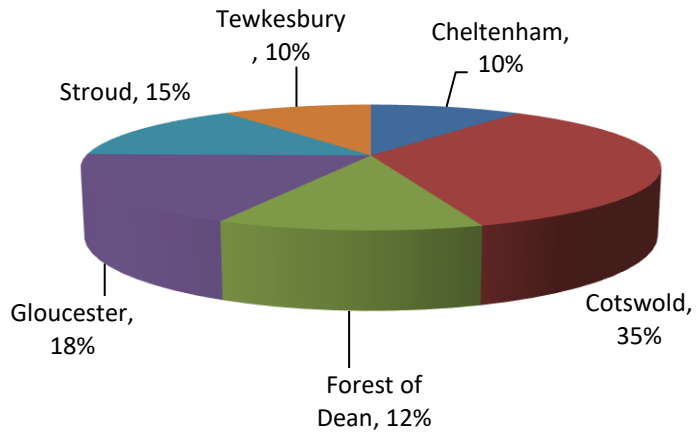
## Forest of Dean - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	35,300	59,000	£8,117,000
Self catering	58,900	176,000	£17,784,000
Touring caravans /tents	56,500	184,000	£8,455,000
Static vans/holiday centres	200	1,000	£49,000
Group/campus	16,800	35,000	£1,724,000
Paying guest in private homes	0	0	£0
Second homes	2,500	9,000	£255,000
Boat moorings	0	0	£0
Other	2,300	6,000	£502,000
Staying with friends and relatives	97,800	214,000	£8,365,000
<b>Total</b>	<b>270,000</b>	<b>683,000</b>	<b>£45,251,000</b>

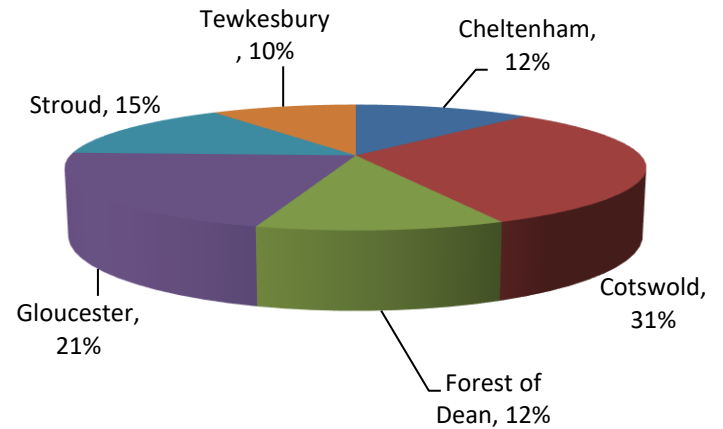
Overseas tourists	Trips	Nights	Spend
Serviced	6,100	19,000	£3,264,000
Self catering	3,200	40,000	£2,633,000
Touring caravans /tents	3,800	15,000	£946,000
Static vans/holiday centres	0	0	£1,000
Group/campus	6,000	122,000	£8,695,000
Paying guest in private homes	0	0	£0
Second homes	300	5,000	£383,000
Boat moorings	0	0	£0
Other	2,200	6,000	£654,000
Staying with friends and relatives	13,200	123,000	£6,538,000
<b>Total</b>	<b>35,000</b>	<b>331,000</b>	<b>£23,115,000</b>

# Forest of Dean - Day visits in the county context

**All day visits**



**All day visit spend**

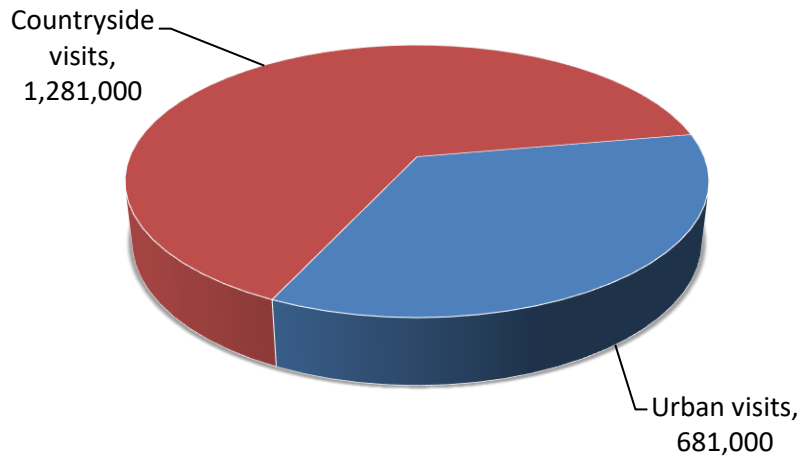


Area	Day visits	Day visit spend
Cheltenham	1.6	£73.5
Cotswold	5.5	£193.5
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Gloucester	2.9	£130.9
Stroud	2.3	£90.2
Tewkesbury	1.6	£60.4

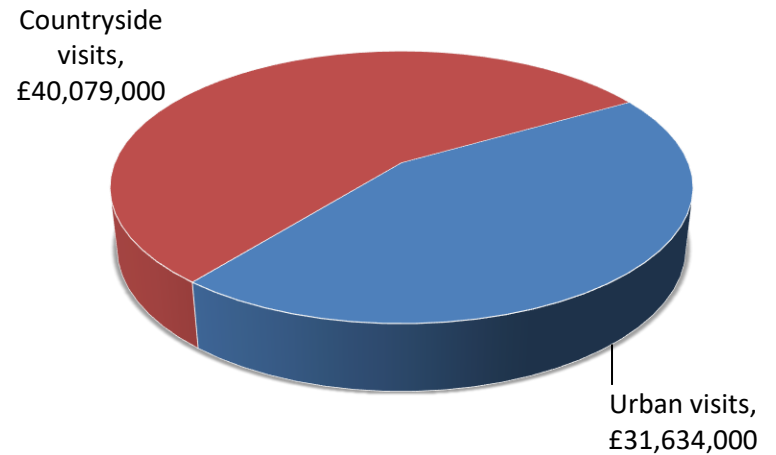
# Forest of Dean - Day visits by location

Total day visits	Total day visit spend
1,962,00	£71,713,000

Day visits



Day visit spend



# Forest of Dean – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £16,162,000
- Overseas staying visitors £6,094,000

Totals

**£22,256,000 (16%)**



## Shopping

- UK staying visitors £6,384,000
- Overseas staying visitors £7,474,000
- Day visitors £23,683,000

**£37,541,000 (27%)**



## Food & drink

- UK staying visitors £9,077,000
- Overseas staying visitors £4,630,000
- Day visitors £27,339,000

**£41,046,000 (29%)**



## Attractions/entertainment

- UK staying visitors £4,473,000
- Overseas staying visitors £2,218,000
- Day visitors £9,232,000

**£15,923,000 (11%)**



## Travel

- UK staying visitors £9,155,000
- Overseas staying visitors £2,699,000
- Day visitors £11,458,000

**£23,312,000 (17%)**



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



Second Homes

£132,000



Visiting friends and relatives (non-visitor spend)

£4,816,000

- 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

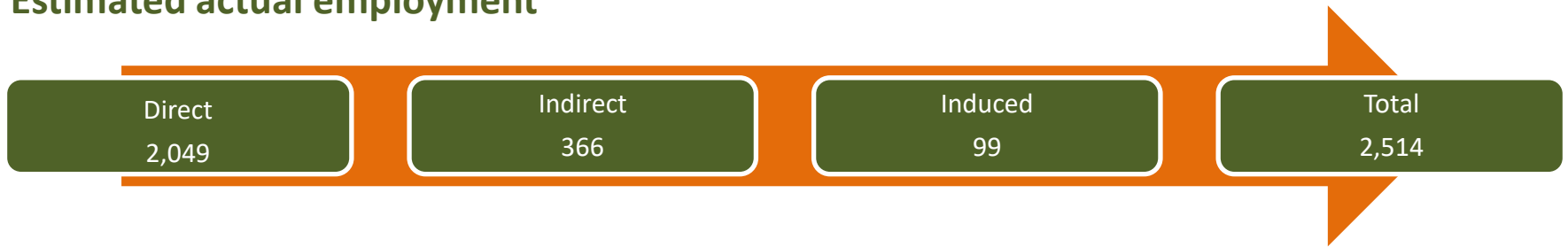
Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£22,530,000	£547,000	£23,077,000
Retailing	£13,719,000	£23,447,000	£37,166,000
Catering	£13,296,000	£26,519,000	£39,815,000
Attractions/entertainment	£6,966,000	£9,742,000	£16,708,000
Transport	£7,113,000	£6,875,000	£13,988,000
Arising from non trip spend	£4,948,000	£0	£4,948,000
<b>Total Direct</b>	<b>£68,572,000</b>	<b>£67,130,000</b>	<b>£135,702,000</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	£68,572,000	£67,130,000	£135,702,000
Supplier and income induced	£15,784,000	£11,414,000	£27,198,000
<b>Total</b>	<b>£84,356,000</b>	<b>£78,544,000</b>	<b>£162,900,000</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	274	7	280
Retailing	96	164	260
Catering	150	300	450
Attractions/entertainment	110	154	264
Transport	41	39	80
Arising from non trip spend	74	0	74
<b>Total Direct</b>	<b>745</b>	<b>664</b>	<b>1,408</b>

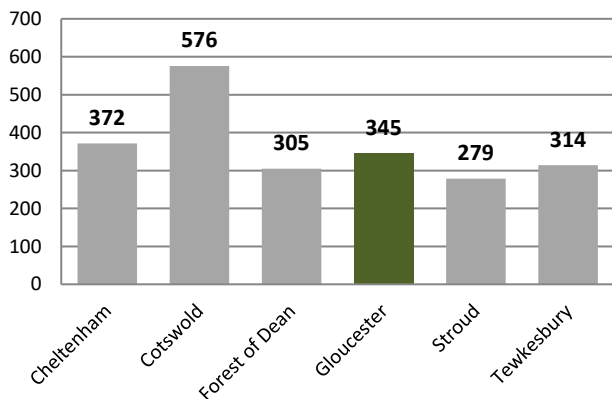
# Value of Tourism 2022

## Gloucester

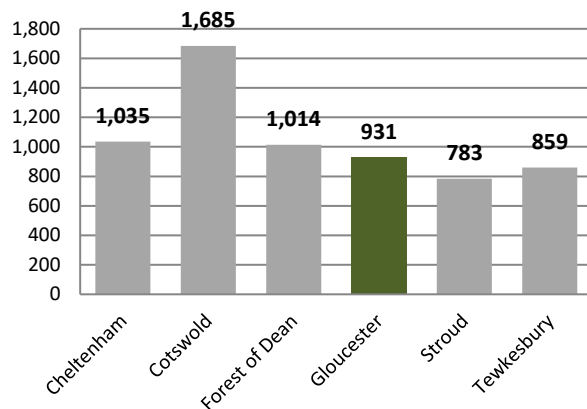
Key Facts	
344,800	Staying visitor trips
931,000	Staying visitor nights
£72,972,000	Staying visitor spend
2,881,000	Day visits
£130,862,000	Day visitor spend
£203,834,000	Direct visitor spend
£7,403,000	Other related spend
£211,237,000	TOTAL VISITOR RELATED SPEND
£264,576,000	TOTAL BUSINESS TURNOVER SUPPORTED
3,969	Estimated actual employment
2,933	FTE employment
6%	Proportion of all employment

# Gloucester - Staying visits in the county context

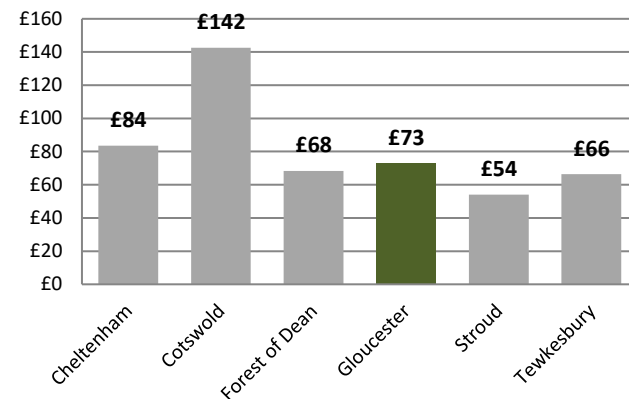
### All staying trips



### All staying nights



### All staying spend



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	326	46	724	311	£59	£25
Cotswold	512	64	1,236	449	£104	£39
Forest of Dean	270	35	683	331	£45	£23
Gloucester	299	46	633	298	£49	£24
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Tewkesbury	276	38	624	235	£47	£19

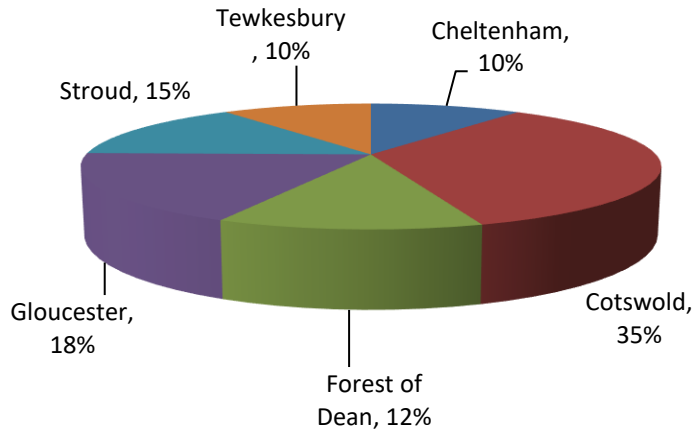
# Gloucester - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	110,800	184,000	£25,497,000
Self catering	30,200	90,000	£9,125,000
Touring caravans /tents	4,900	16,000	£728,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	2,100	7,000	£215,000
Boat moorings	2,000	6,000	£430,000
Other	3,500	9,000	£747,000
Staying with friends and relatives	145,700	319,000	£12,457,000
<b>Total</b>	<b>299,200</b>	<b>633,000</b>	<b>£49,198,000</b>

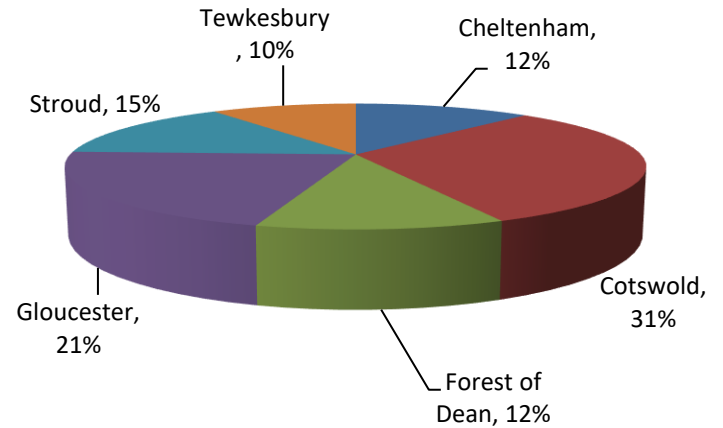
Overseas tourists	Trips	Nights	Spend
Serviced	19,200	61,000	£10,253,000
Self catering	1,600	21,000	£1,351,000
Touring caravans /tents	300	1,000	£81,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	1,300	19,000	£1,055,000
Second homes	300	4,000	£323,000
Boat moorings	0	0	£0
Other	3,200	9,000	£974,000
Staying with friends and relatives	19,600	183,000	£9,736,000
<b>Total</b>	<b>45,600</b>	<b>298,000</b>	<b>£23,774,000</b>

# Gloucester - Day visits in the county context

All day visits



All day visit spend

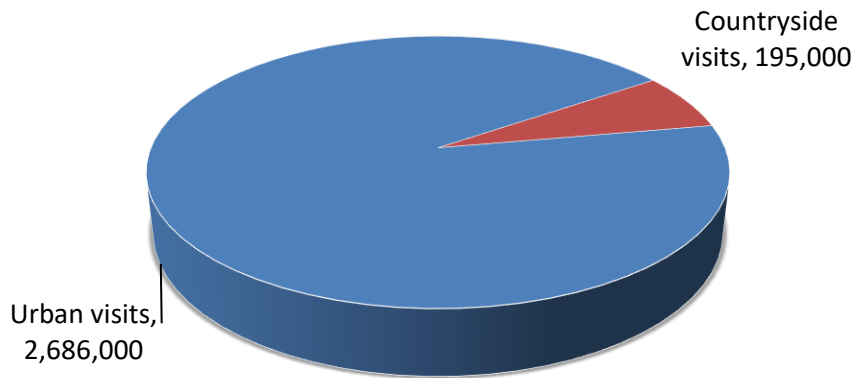


Area	Day visits	Day visit spend
Cheltenham	1.6	£73.5
Cotswold	5.5	£193.5
Forest of Dean	2.0	£71.7
Gloucester	2.9	£130.9
Stroud	2.3	£90.2
Tewkesbury	1.6	£60.4

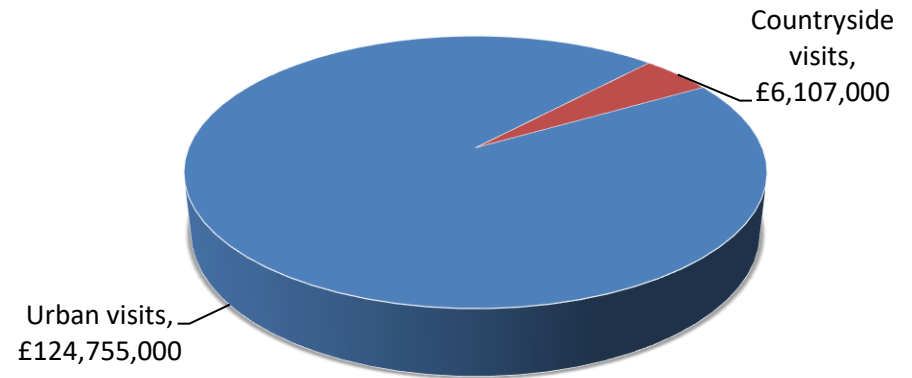
# Gloucester - Day visits by location

Total day visits	Total day visit spend
2,881,000	£130,862,000

Day visits



Day visit spend





# Gloucester – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £17,572,000
- Overseas staying visitors £6,268,000

Totals

**£23,840,000 (12%)**



## Shopping

- UK staying visitors £6,941,000
- Overseas staying visitors £7,687,000
- Day visitors £59,743,000

**£74,371,000 (36%)**



## Food & drink

- UK staying visitors £9,869,000
- Overseas staying visitors £4,762,000
- Day visitors £44,226,000

**£58,857,000 (29%)**



## Attractions/entertainment

- UK staying visitors £4,863,000
- Overseas staying visitors £2,281,000
- Day visitors £11,793,000

**£18,937,000 (9%)**



## Travel

- UK staying visitors £9,954,000
- Overseas staying visitors £2,776,000
- Day visitors £15,099,000

**£27,829,000 (14%)**

## Gloucester – Other visitor related expenditure by category



Second Homes

£111,000



Boats

£121,000



Visiting friends and relatives (non-visitor spend)

£7,171,000

- 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

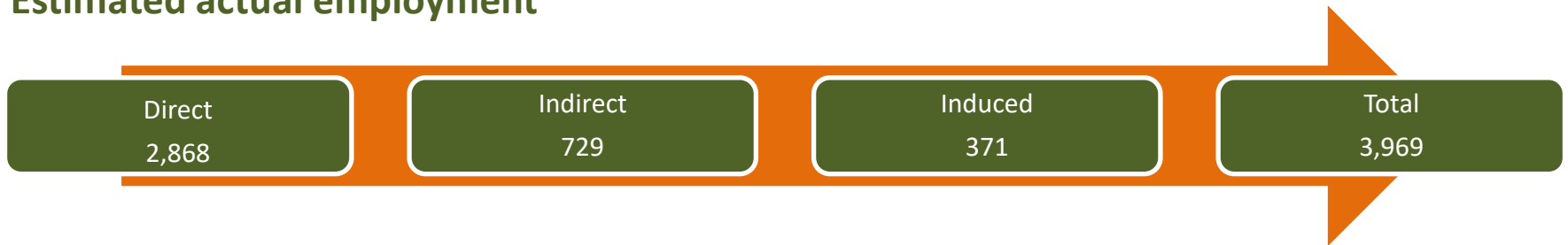
Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£24,132,000	£885,000	£25,017,000
Retailing	£14,482,000	£59,146,000	£73,628,000
Catering	£14,192,000	£42,899,000	£57,091,000
Attractions/entertainment	£7,436,000	£12,832,000	£20,268,000
Transport	£7,638,000	£9,060,000	£16,698,000
Arising from non trip spend	£7,403,000	£0	£7,403,000
<b>Total Direct</b>	<b>£75,283,000</b>	<b>£124,822,000</b>	<b>£200,105,000</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	£75,283,000	£124,822,000	£200,105,000
Supplier and income induced	£29,434,000	£35,037,000	£64,471,000
<b>Total</b>	<b>£104,717,000</b>	<b>£159,859,000</b>	<b>£264,576,000</b>

# 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	289	11	300
Retailing	100	409	509
Catering	158	479	637
Attractions/entertainment	116	200	316
Transport	43	51	94
Arising from non trip spend	111	0	111
<b>Total Direct</b>	<b>818</b>	<b>1,149</b>	<b>1,967</b>

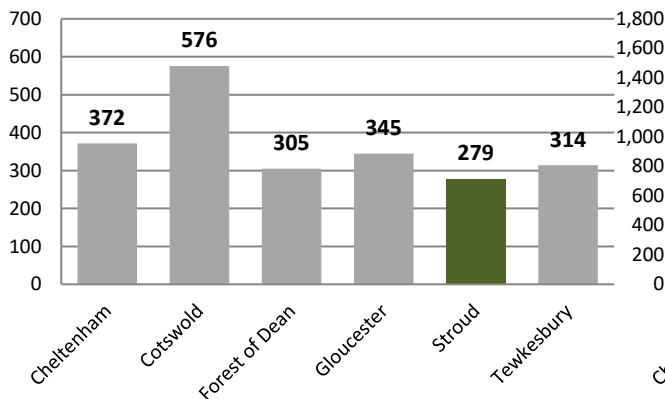
# Value of Tourism 2022

## Stroud

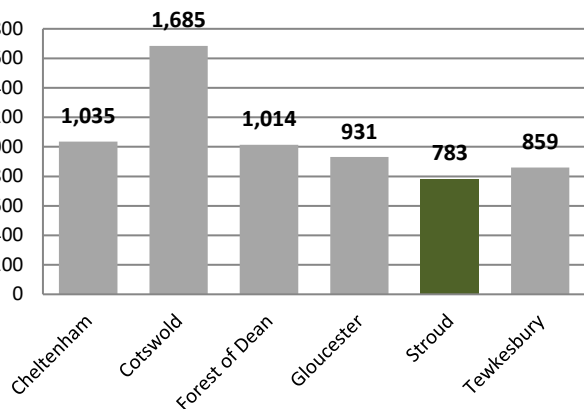
Key Facts	
278,500	Staying visitor trips
783,000	Staying visitor nights
£54,099,000	Staying visitor spend
2,318,000	Day visits
£90,237,000	Day visitor spend
£144,336,000	Direct visitor spend
£6,463,000	Other related spend
£150,799,000	TOTAL VISITOR RELATED SPEND
£188,153,000	TOTAL BUSINESS TURNOVER SUPPORTED
2,725	Estimated actual employment
2,028	FTE employment
4%	Proportion of all employment

# Stroud - Staying visits in the county context

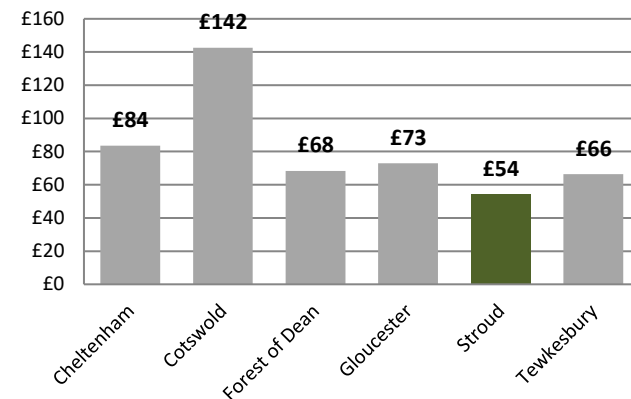
### All staying trips



### All staying nights



### All staying spend



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	326	46	724	311	£59	£25
Cotswold	512	64	1,236	449	£104	£39
Forest of Dean	270	35	683	331	£45	£23
Gloucester	299	46	633	298	£49	£24
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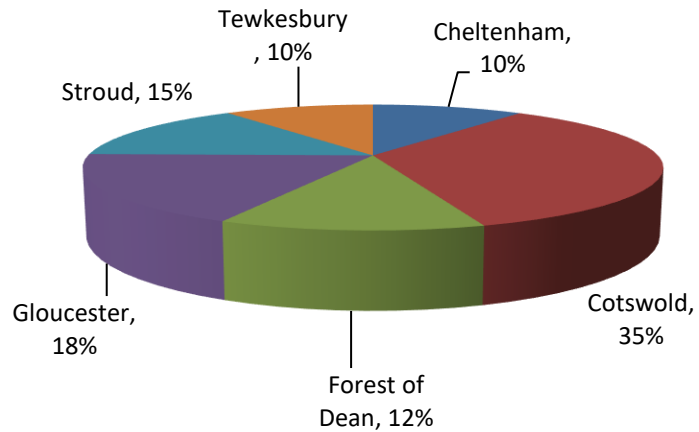
## Stroud - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	62,700	104,000	£14,429,000
Self catering	23,100	69,000	£6,983,000
Touring caravans /tents	13,400	44,000	£2,001,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	4,100	14,000	£415,000
Boat moorings	1,400	4,000	£297,000
Other	3,200	9,000	£696,000
Staying with friends and relatives	135,800	298,000	£11,612,000
<b>Total</b>	<b>243,700</b>	<b>542,000</b>	<b>£36,433,000</b>

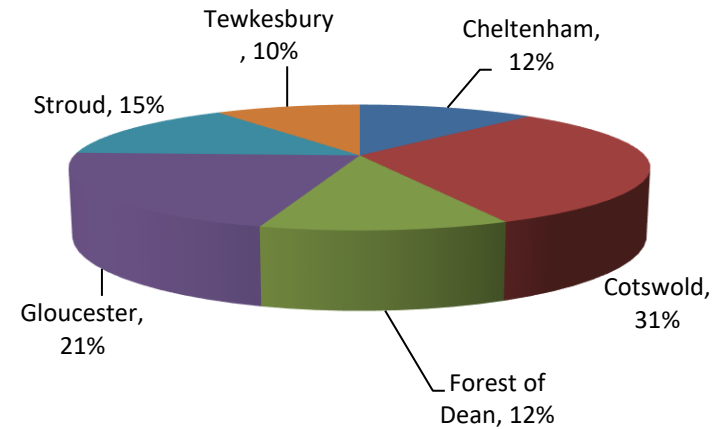
Overseas tourists	Trips	Nights	Spend
Serviced	10,800	34,000	£5,803,000
Self catering	1,200	16,000	£1,034,000
Touring caravans /tents	900	4,000	£224,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	500	8,000	£622,000
Boat moorings	0	0	£0
Other	3,000	9,000	£908,000
Staying with friends and relatives	18,300	171,000	£9,075,000
<b>Total</b>	<b>34,800</b>	<b>241,000</b>	<b>£17,666,000</b>

# Stroud - Day visits in the county context

**All day visits**



**All day visit spend**



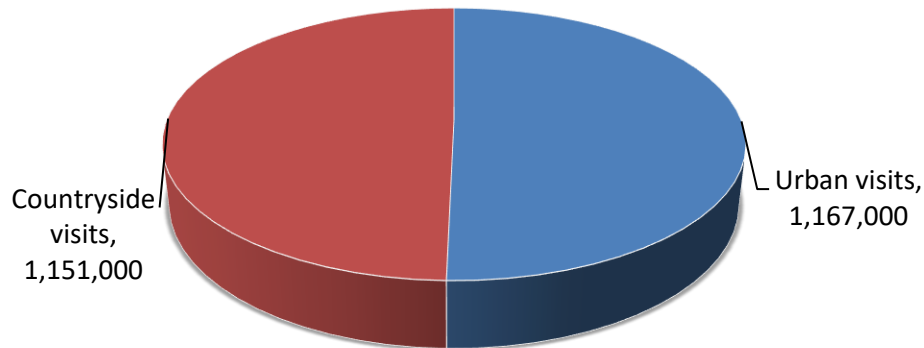
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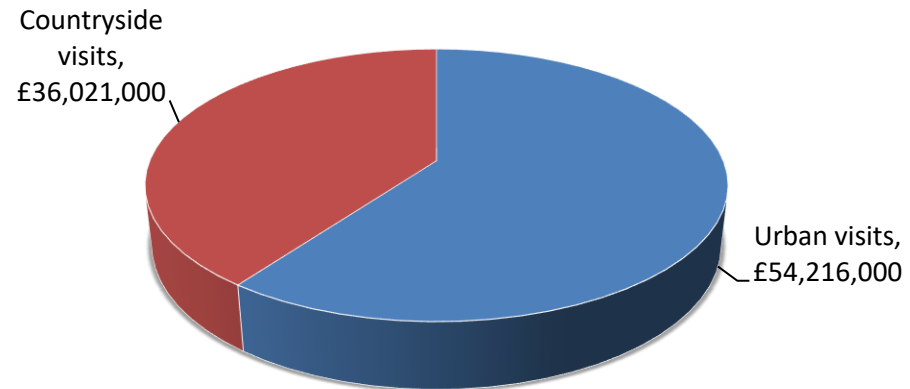
# Stroud - Day visits by location

Total day visits	Total day visit spend
2,318,000	£90,237,000

Day visits



Day visit spend



# Stroud – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £13,012,000
- Overseas staying visitors £4,657,000

Totals

**£17,669,000 (12%)**



## Shopping

- UK staying visitors £5,140,000
- Overseas staying visitors £5,712,000
- Day visitors £33,354,000

**£44,206,000 (31%)**



## Food & drink

- UK staying visitors £7,308,000
- Overseas staying visitors £3,539,000
- Day visitors £33,184,000

**£44,031,000 (31%)**



## Attractions/entertainment

- UK staying visitors £3,601,000
- Overseas staying visitors £1,695,000
- Day visitors £10,530,000

**£15,826,000 (11%)**



## Travel

- UK staying visitors £7,371,000
- Overseas staying visitors £2,063,000
- Day visitors £13,169,000

**£22,603,000 (16%)**

## Stroud – Other visitor related expenditure by category



Second Homes

£215,000



Boats

£84,000



Visiting friends and relatives (non-visitor spend)

£6,164,000

- 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	£17,887,000	£664,000	£18,551,000
Retailing	£10,744,000	£33,021,000	£43,765,000
Catering	£10,521,000	£32,189,000	£42,710,000
Attractions/entertainment	£5,513,000	£11,196,000	£16,709,000
Transport	£5,660,000	£7,901,000	£13,561,000
Arising from non trip spend	£6,463,000	£0	£6,463,000
<b>Total Direct</b>	<b>£56,788,000</b>	<b>£84,971,000</b>	<b>£141,759,000</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	£56,788,000	£84,971,000	£141,759,000
Supplier and income induced	£21,828,000	£24,566,000	£46,394,000
<b>Total</b>	<b>£78,616,000</b>	<b>£109,537,000</b>	<b>£188,153,000</b>

# 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	198	7	206
Retailing	69	211	279
Catering	108	332	440
Attractions/entertainment	79	161	241
Transport	29	41	71
Arising from non trip spend	97	0	97
<b>Total Direct</b>	<b>581</b>	<b>753</b>	<b>1,334</b>

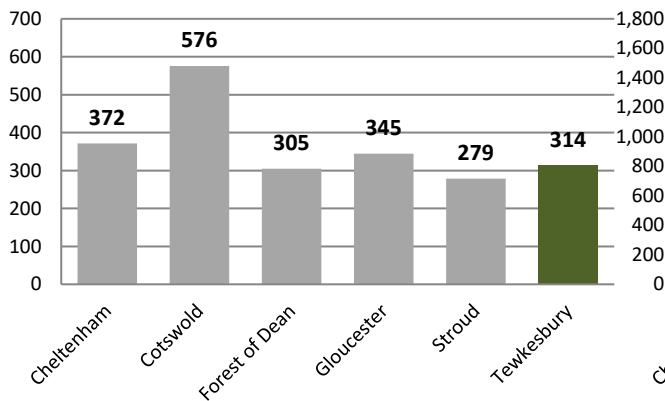
# Value of Tourism 2022

## Tewkesbury

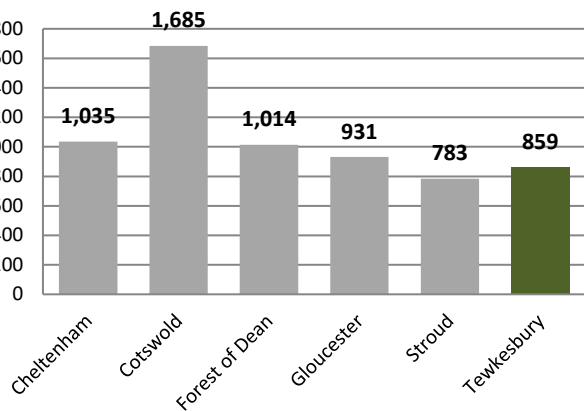
Key Facts	
313,600	Staying visitor trips
859,000	Staying visitor nights
£66,341,000	Staying visitor spend
1,590,000	Day visits
£60,380,000	Day visitor spend
£126,721,000	Direct visitor spend
£6,227,000	Other related spend
£132,948,000	TOTAL VISITOR RELATED SPEND
£149,343,000	TOTAL BUSINESS TURNOVER SUPPORTED
2,101	Estimated actual employment
1,531	FTE employment
5%	Proportion of all employment

# Tewkesbury - Staying visits in the county context

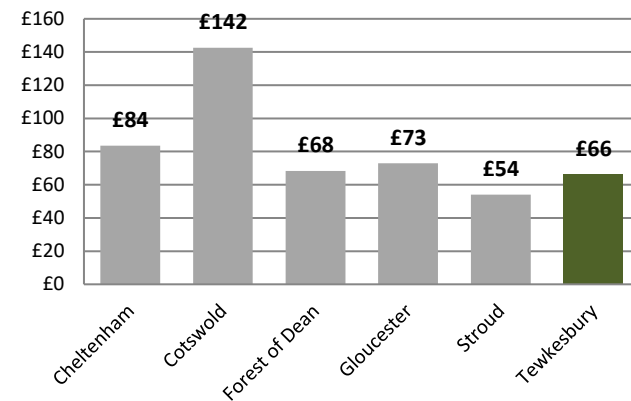
### All staying trips



### All staying nights



### All staying spend



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	326	46	724	311	£59	£25
Cotswold	512	64	1,236	449	£104	£39
Forest of Dean	270	35	683	331	£45	£23
Gloucester	299	46	633	298	£49	£24
Stroud	244	35	542	241	£36	£18
Tewkesbury	276	38	624	235	£47	£19

# Tewkesbury - Staying visits by accommodation type

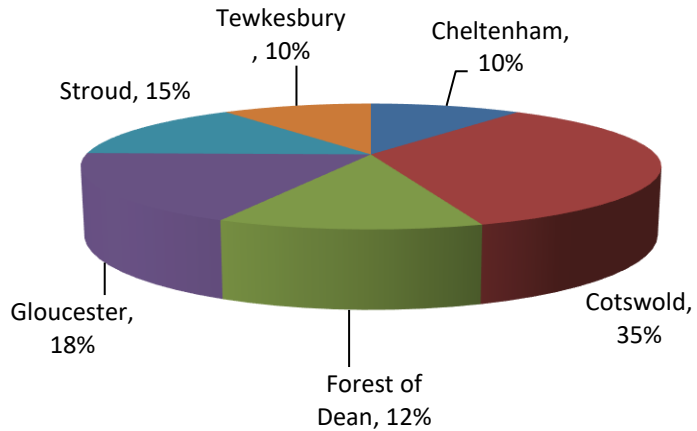
Domestic tourists	Trips	Nights	Spend
Serviced	93,200	155,000	£21,440,000
Self catering	28,700	86,000	£8,659,000
Touring caravans /tents	27,700	90,000	£4,140,000
Static vans/holiday centres	400	1,000	£97,000
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	2,200	8,000	£223,000
Boat moorings	12,900	40,000	£2,738,000
Other	2,600	7,000	£556,000
Staying with friends and relatives	108,500	238,000	£9,278,000
<b>Total</b>	<b>276,100</b>	<b>624,000</b>	<b>£47,132,000</b>

Overseas tourists	Trips	Nights	Spend
Serviced	16,100	51,000	£8,622,000
Self catering	1,500	20,000	£1,282,000
Touring caravans /tents	1,900	7,000	£463,000
Static vans/holiday centres	0	0	£2,000
Group/campus	0	0	£0
Paying guest in private homes	700	10,000	£528,000
Second homes	300	4,000	£335,000
Boat moorings	0	0	£0
Other	2,400	7,000	£725,000
Staying with friends and relatives	14,600	136,000	£7,251,000
<b>Total</b>	<b>37,500</b>	<b>235,000</b>	<b>£19,209,000</b>

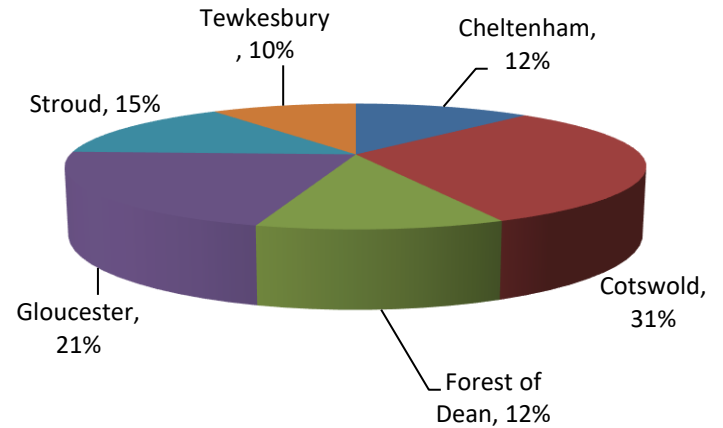


# Tewkesbury - Day visits in the county context

**All day visits**



**All day visit spend**

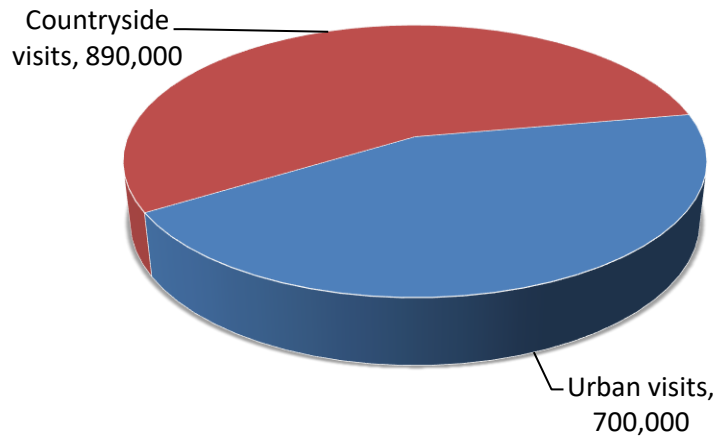


Area	Day visits	Day visit spend
Cheltenham	1.6	£73.5
Cotswold	5.5	£193.5
Forest of Dean	2.0	£71.7
Gloucester	2.9	£130.9
Stroud	2.3	£90.2
Tewkesbury	1.6	£60.4

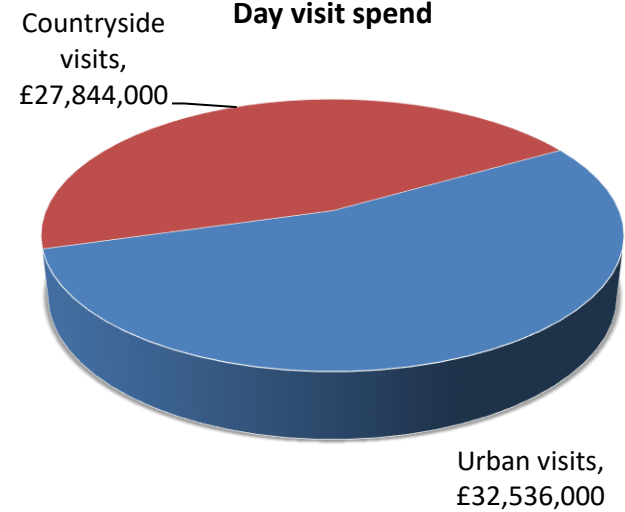
# Tewkesbury - Day visits by location

Total day visits	Total day visit spend
1,590,000	£60,380,000

**Day visits**



**Day visit spend**



# Tewkesbury – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £16,834,000
- Overseas staying visitors £5,064,000

Totals

**£21,898,000 (17%)**



## Shopping

- UK staying visitors £6,649,000
- Overseas staying visitors £6,211,000
- Day visitors £21,395,000

**£34,255,000 (27%)**



## Food & drink

- UK staying visitors £9,454,000
- Overseas staying visitors £3,848,000
- Day visitors £22,520,000

**£35,822,000 (28%)**



## Attractions/entertainment

- UK staying visitors £4,659,000
- Overseas staying visitors £1,843,000
- Day visitors £7,328,000

**£13,830,000 (11%)**



## Travel

- UK staying visitors £9,536,000
- Overseas staying visitors £2,243,000
- Day visitors £9,136,000

**£20,915,000 (17%)**

## Tewkesbury – Other visitor related expenditure by category



Second Homes

£116,000



Boats

£770,000



Visiting friends and relatives (non-visitor spend)

£5,341,000

- 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	£22,164,000	£450,000	£22,614,000
Retailing	£12,732,000	£21,181,000	£33,913,000
Catering	£12,903,000	£21,844,000	£34,747,000
Attractions/entertainment	£6,763,000	£7,767,000	£14,530,000
Transport	£7,067,000	£5,481,000	£12,548,000
Arising from non trip spend	£6,227,000	£0	£6,227,000
<b>Total Direct</b>	<b>£67,856,000</b>	<b>£56,723,000</b>	<b>£124,579,000</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	£67,856,000	£56,723,000	£124,579,000
Supplier and income induced	£15,509,000	£9,255,000	£24,764,000
<b>Total</b>	<b>£83,365,000</b>	<b>£65,978,000</b>	<b>£149,343,000</b>

# 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	238	5	243
Retailing	79	131	210
Catering	129	218	347
Attractions/entertainment	95	109	203
Transport	36	28	63
Arising from non trip spend	93	0	93
<b>Total Direct</b>	<b>670</b>	<b>491</b>	<b>1,160</b>