

# **The Economic Impact of Gloucestershire's Visitor Economy 2023**

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



**November 2024**

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# Introduction

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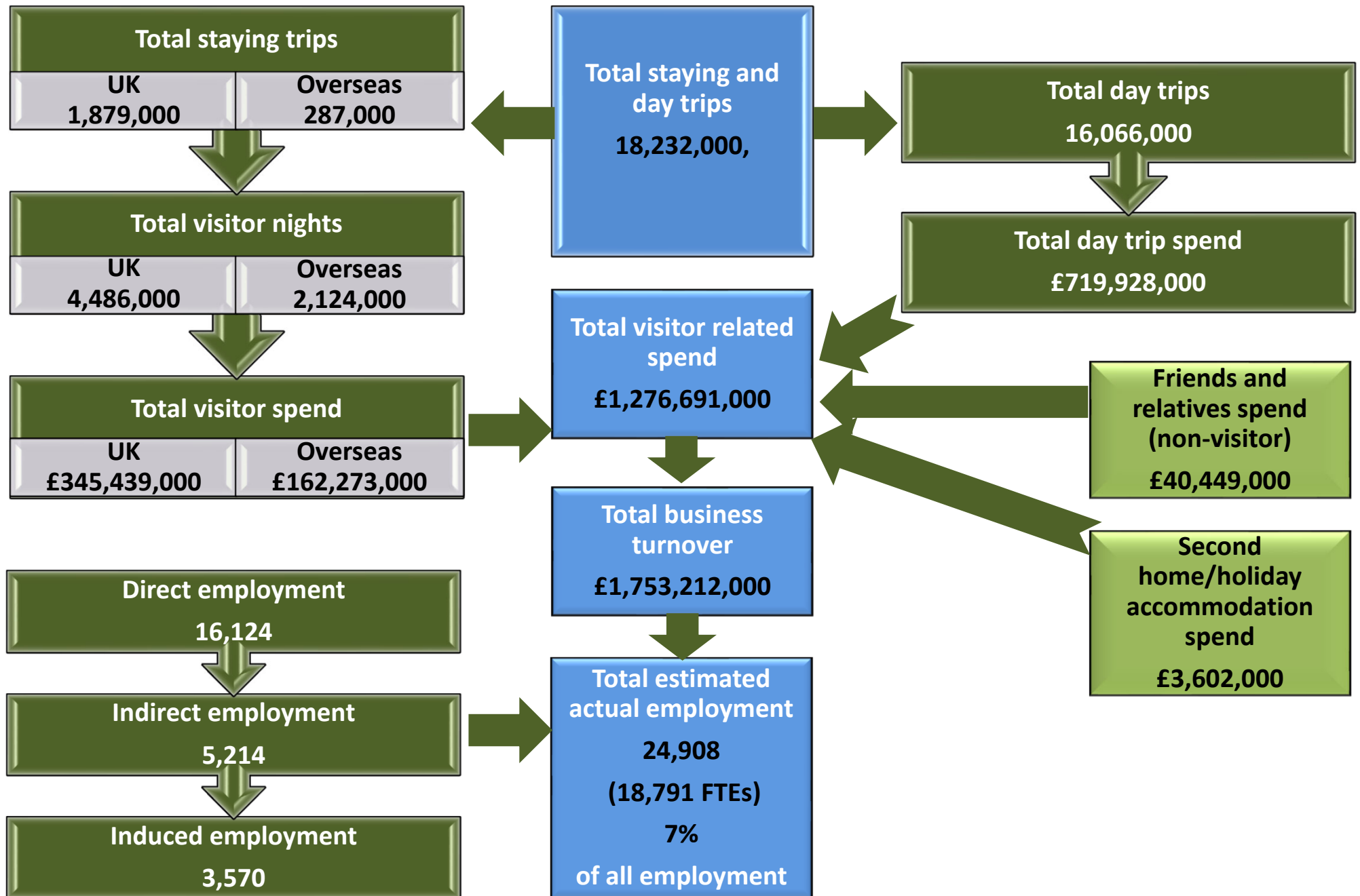
This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in Gloucestershire in 2023.

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 2023, including key facts about the economy, weather and key events please see Appendix 2 of this report.

# Gloucestershire - Key facts at a glance



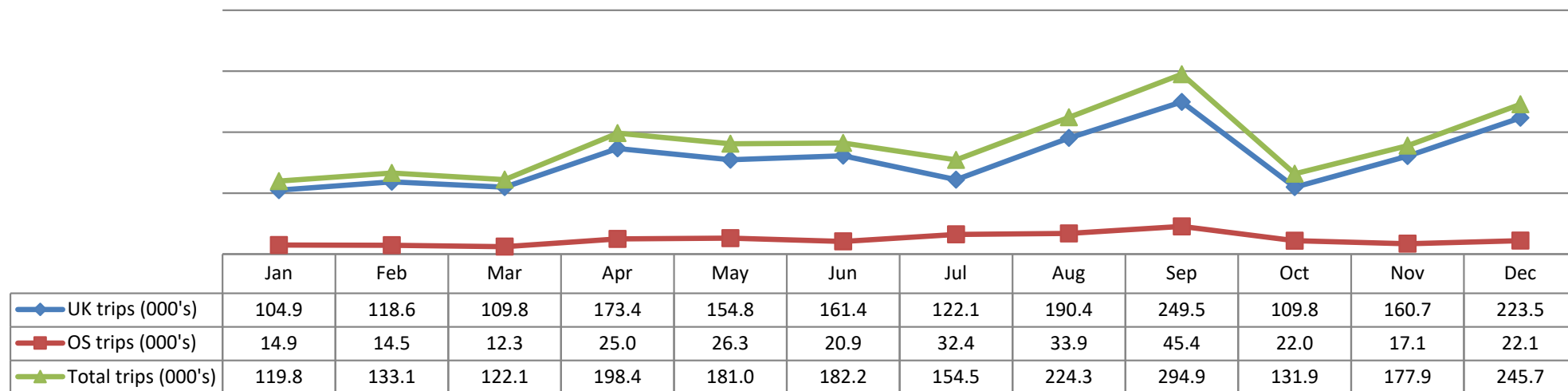
# Gloucestershire - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	575,000	995,000	£135,538,000
Self catering	328,000	1,015,000	£103,530,000
Touring caravans /tents	175,000	581,000	£28,216,000
Static vans/holiday centres	2,000	7,000	£590,000
Group/campus	24,000	52,000	£2,605,000
Paying guest in private homes	0	0	£0
Second homes	36,000	133,000	£3,876,000
Boat moorings	20,000	63,000	£4,346,000
Other	17,000	47,000	£3,775,000
Staying with friends and relatives	702,000	1,594,000	£62,962,000
Total	1,879,000	4,486,000	£345,439,000

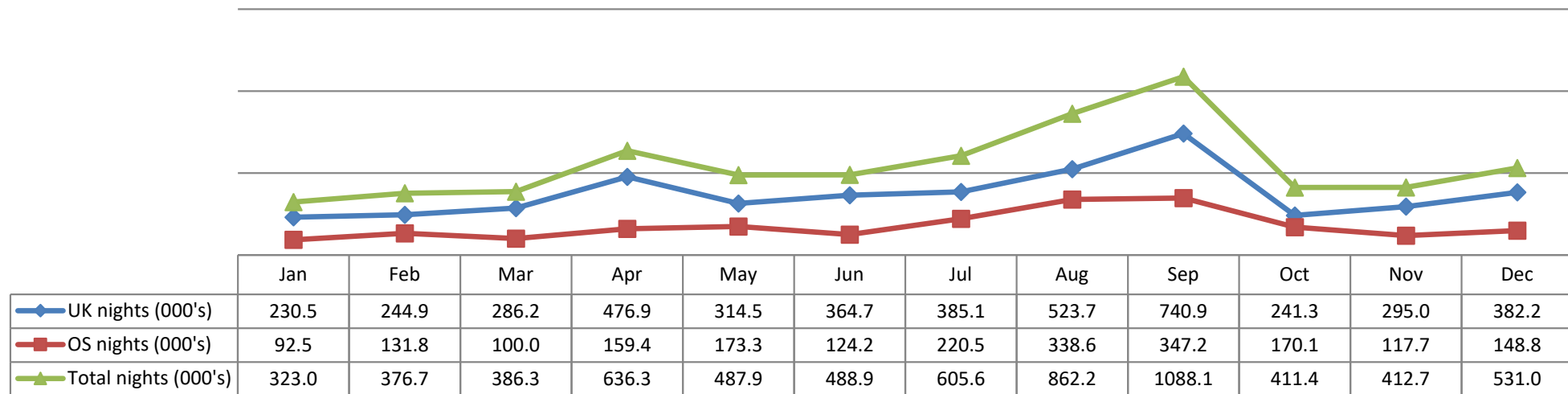
Overseas tourists	Trips	Nights	Spend
Serviced	111,000	369,000	£60,991,000
Self catering	20,000	263,000	£17,148,000
Touring caravans /tents	13,000	54,000	£3,534,000
Static vans/holiday centres	0	0	£14,000
Group/campus	10,000	206,000	£14,699,000
Paying guest in private homes	4,000	65,000	£3,635,000
Second homes	5,500	86,000	£6,525,000
Boat moorings	0	0	£0
Other	17,000	52,000	£5,523,000
Staying with friends and relatives	106,000	1,028,000	£55,203,000
Total	287,000	2,124,000	£167,273,000

# Gloucestershire - Estimated seasonality of staying visits

Seasonality - trips

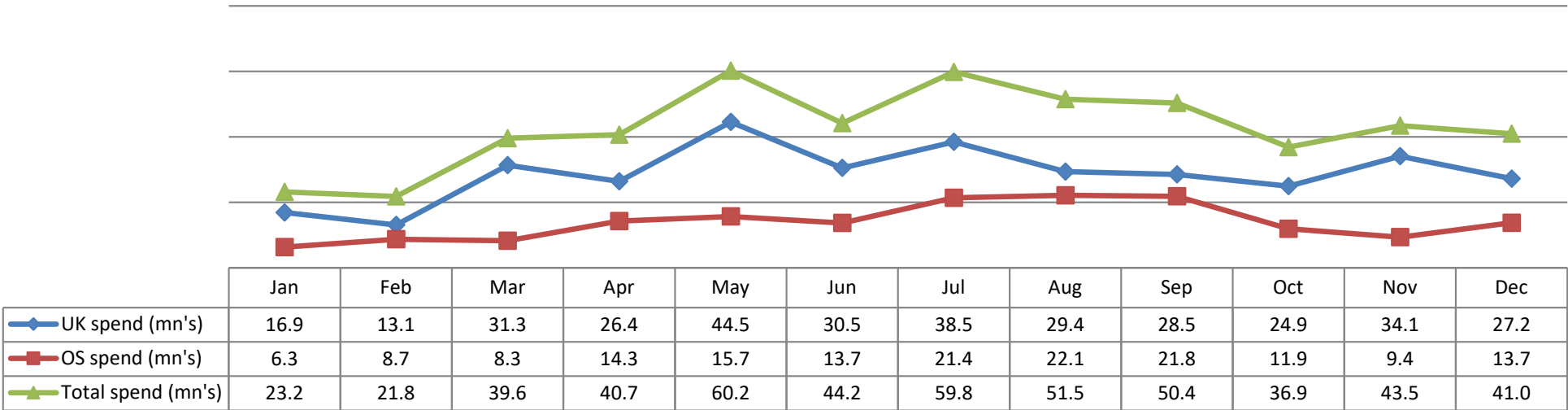


Seasonality - nights



# Gloucestershire - Estimated seasonality of staying visits

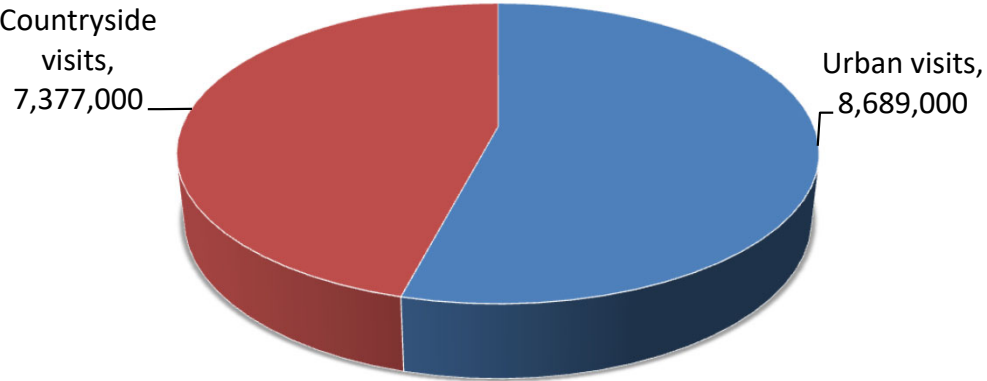
Seasonality - spend



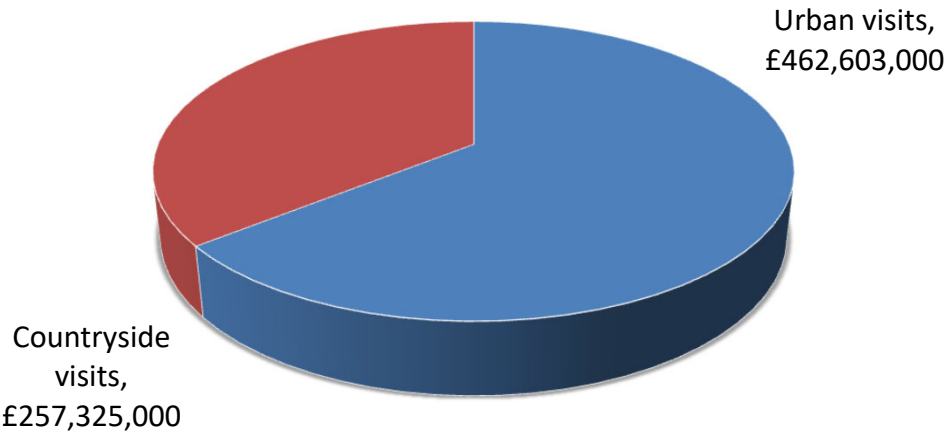
# Gloucestershire - Day visits by location

Total day visits	Total day visit spend
16,066,000	£719,928,000

Day visits



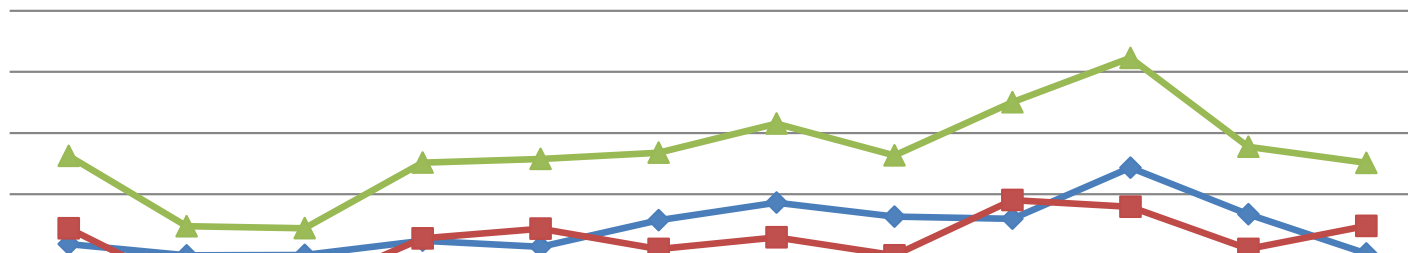
Day visit spend





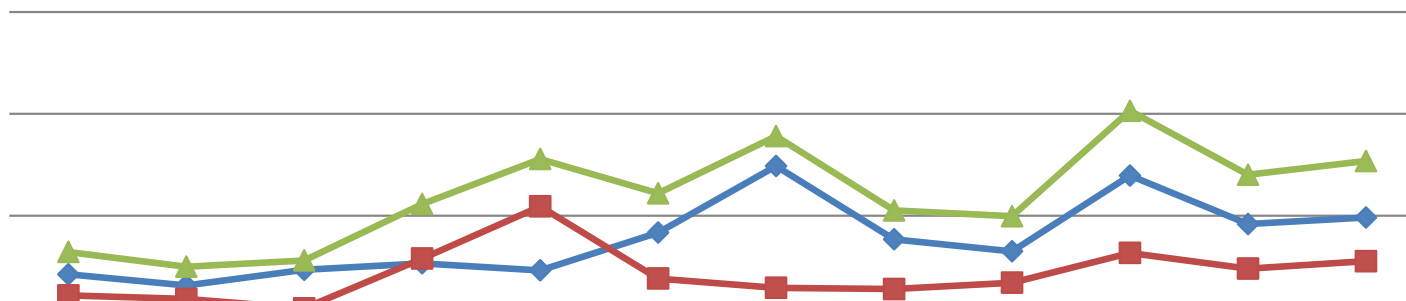
# Gloucestershire - Estimated seasonality of day visits

Seasonality - day visits (000's)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban(000's)	592.8	499.9	503.3	619.4	570.2	787.8	931.0	816.9	799.3	1216.9	836.1	515.5
Rural (000's)	720.6	238.4	218.5	638.8	717.9	552.2	647.3	500.1	952.2	897.7	552.3	740.9
Total (000's)	1313.4	738.3	721.7	1258.3	1288.1	1340.0	1578.3	1317.1	1751.5	2114.6	1388.4	1256.4

Seasonality - day visit spend (millions)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Urban (mn)	21.3	15.8	23.5	26.7	23.2	41.8	74.4	38.5	32.6	69.7	45.9	49.1
Rural (mn)	11.0	9.2	4.6	29.0	54.6	19.2	14.7	14.1	17.2	31.8	24.1	27.8
Total (mn)	32.3	25.0	28.1	55.7	77.8	61.0	89.1	52.6	49.8	101.5	70.1	76.9

# 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 £125,670,000
- Overseas staying visitors £45,432,000

### Totals

**£171,102,000 (14%)**



## Shopping

- UK staying visitors £46,520,000
- Overseas staying visitors £51,627,000
- Day visitors £262,944,000

**£361,091,000 (29%)**



## Food & drink

- UK staying visitors £73,143,000
- Overseas staying visitors £35,367,000
- Day visitors £276,777,000

**£385,287,000 (31%)**



## Attractions/entertainment

- UK staying visitors £36,040,000
- Overseas staying visitors £16,940,000
- Day visitors £86,289,000

**£139,269,000 (11%)**



## Travel

- UK staying visitors £64,065,000
- Overseas staying visitors £17,906,000
- Day visitors £93,919,000

**£175,890,000 (14%)**

## Gloucestershire – Other visitor related expenditure by category



Second Homes

£2,238,000



Boats

£1,364,000



Visiting friends and relatives (non-visitor spend)

£40,449,000

- 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	£173,273,000	£5,536,000	£178,809,000
Retailing	£97,166,000	£260,315,000	£357,481,000
Catering	£105,255,000	£268,473,000	£373,728,000
Attractions/entertainment	£55,047,000	£91,686,000	£146,733,000
Transport	£49,183,000	£56,351,000	£105,534,000
Arising from non trip spend	£44,051,000	£0	£44,051,000
<b>Total Direct</b>	<b>£523,975,000</b>	<b>£682,361,000</b>	<b>£1,206,336,000</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	£523,975,000	£682,361,000	£1,206,336,000
Supplier and income induced	£268,398,000	£278,478,000	£546,876,000
<b>Total</b>	<b>£792,373,000</b>	<b>£960,839,000</b>	<b>£1,753,212,000</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.

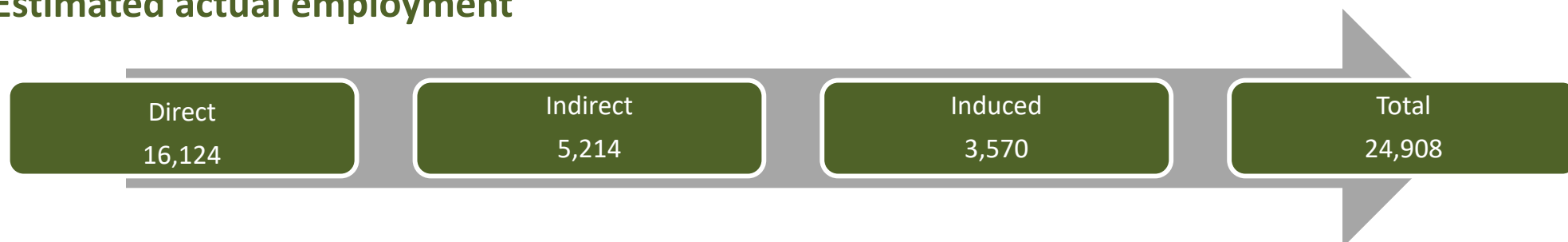
This section of the report looks at employment on three levels;

- **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	1,795	57	1,853
Retailing	599	1,606	2,205
Catering	1,041	2,656	3,698
Attractions/entertainment	816	1,360	2,176
Transport	248	285	533
Arising from non trip spend	621	0	621
<b>Total Direct</b>	<b>5,122</b>	<b>5,964</b>	<b>11,085</b>

## District data

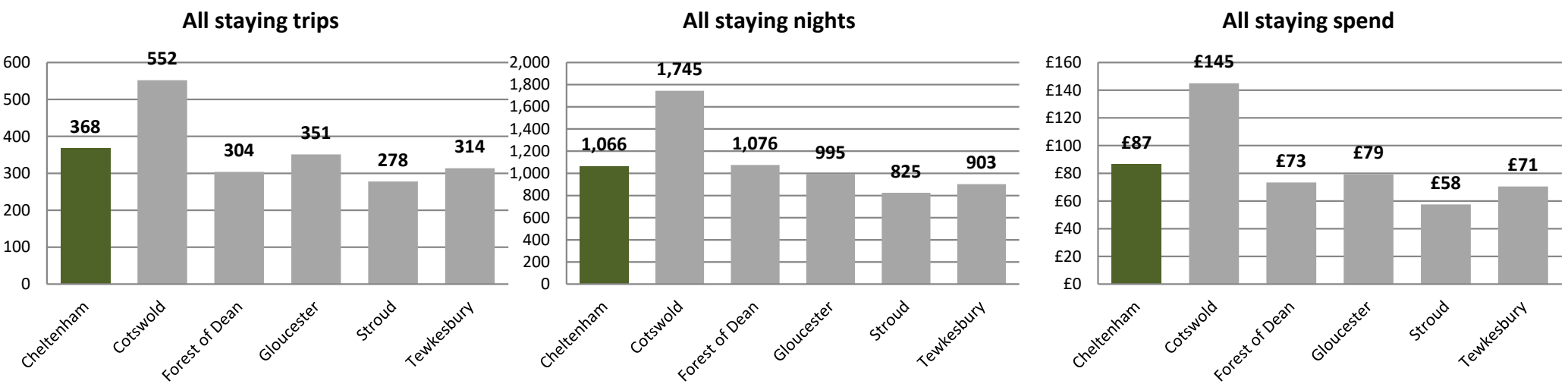


# Value of Tourism 2023

## Cheltenham

Key Facts	
367,700	Staying visitor trips
1,066,000	Staying visitor nights
£86,832,000	Staying visitor spend
1,702,000	Day visits
£89,208,000	Day visitor spend
£176,040,000	Direct visitor spend
£7,720,000	Other related spend
£183,760,000	TOTAL VISITOR RELATED SPEND
£232,732,000	TOTAL BUSINESS TURNOVER SUPPORTED
3,075	Estimated actual employment
2,296	FTE employment
5%	Proportion of all employment

# Cheltenham - Staying visits in the county context



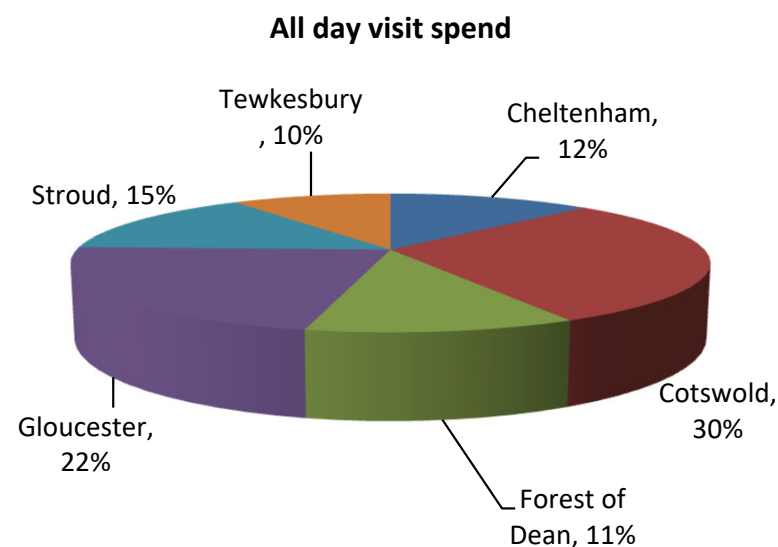
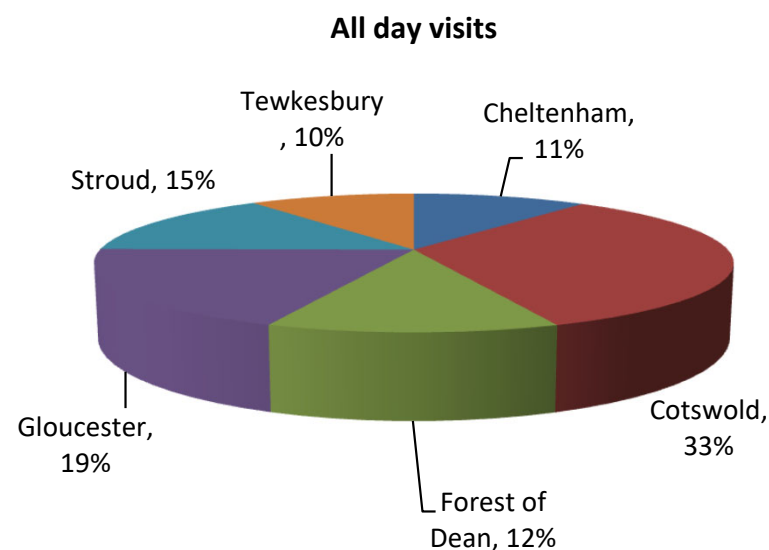
Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	316	52	715	351	£58	£29
Cotswold	486	66	1,240	505	£103	£42
Forest of Dean	266	38	698	378	£47	£26
Gloucester	300	51	651	344	£51	£28
Stroud	240	39	549	276	£37	£20
Tewkesbury	272	42	634	269	£48	£22

# Cheltenham - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	120,000	208,000	£28,287,000
Self catering	47,800	148,000	£15,079,000
Touring caravans /tents	11,600	39,000	£1,873,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	6,400	24,000	£685,000
Boat moorings	0	0	£0
Other	3,000	9,000	£684,000
Staying with friends and relatives	127,100	289,000	£11,401,000
Total	316,000	715,000	£58,009,000

Overseas tourists	Trips	Nights	Spend
Serviced	23,200	77,000	£12,729,000
Self catering	2,900	38,000	£2,498,000
Touring caravans /tents	900	4,000	£235,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	1,500	22,000	£1,212,000
Second homes	1,000	15,000	£1,154,000
Boat moorings	0	0	£0
Other	3,200	9,000	£1,000,000
Staying with friends and relatives	19,200	186,000	£9,996,000
Total	51,700	351,000	£28,823,000

# Cheltenham - Day visits in the county context

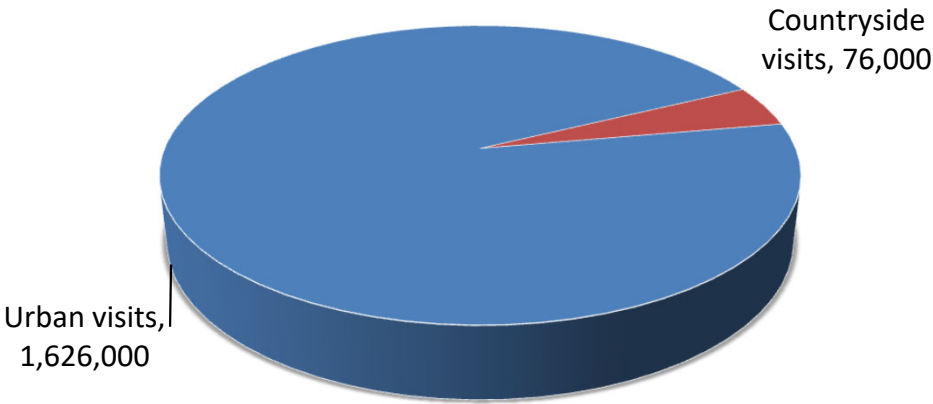


Area	Day visits	Day visit spend
Cheltenham	1.7	£89.2
Cotswold	5.3	£214.0
Forest of Dean	2.0	£82.4
Gloucester	3.0	£158.7
Stroud	2.4	£105.5
Tewkesbury	1.6	£70.1

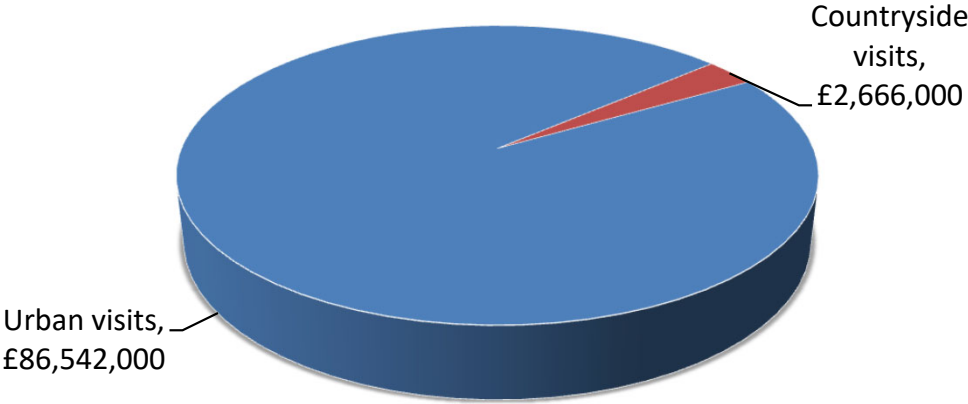
# Cheltenham - Day visits by location

Total day visits	Total day visit spend
1,702,000	£89,208,000

Day visits



Day visit spend



# Cheltenham – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £21,104,000
- Overseas staying visitors £7,828,000

### Totals

**£28,932,000 (16%)**



## Shopping

- UK staying visitors £7,812,000
- Overseas staying visitors £8,896,000
- Day visitors £39,835,000

**£56,543,000 (32%)**



## Food & drink

- UK staying visitors £12,283,000
- Overseas staying visitors £6,094,000
- Day visitors £31,690,000

**£50,067,000 (28%)**



## Attractions/entertainment

- UK staying visitors £6,052,000
- Overseas staying visitors £2,919,000
- Day visitors £8,367,000

**£17,338,000 (10%)**



## Travel

- UK staying visitors £10,758,000
- Overseas staying visitors £3,085,000
- Day visitors £9,316,000

**£23,159,000 (13%)**

## Cheltenham – Other visitor related expenditure by category



Second Homes  
£396,000



Visiting friends and relatives (non-visitor spend)  
£7,324,000

- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Additional spending is incurred by friends and relatives as a result of people coming to stay with them.

# Cheltenham – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£29,300,000	£634,000	£29,934,000
Retailing	£16,541,000	£39,436,000	£55,977,000
Catering	£17,826,000	£30,740,000	£48,566,000
Attractions/entertainment	£9,322,000	£9,082,000	£18,404,000
Transport	£8,306,000	£5,590,000	£13,896,000
Arising from non trip spend	£7,720,000	£0	£7,720,000
<b>Total Direct</b>	<b>£89,015,000</b>	<b>£85,482,000</b>	<b>£174,497,000</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	£89,015,000	£85,482,000	£174,497,000
Supplier and income induced	£34,515,000	£23,720,000	£58,235,000
<b>Total</b>	<b>£123,530,000</b>	<b>£109,202,000</b>	<b>£232,732,000</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	281	6	287
Retailing	94	225	319
Catering	163	281	444
Attractions/entertainment	128	124	252
Transport	39	26	65
Arising from non trip spend	109	0	109
Total Direct	813	662	1,475

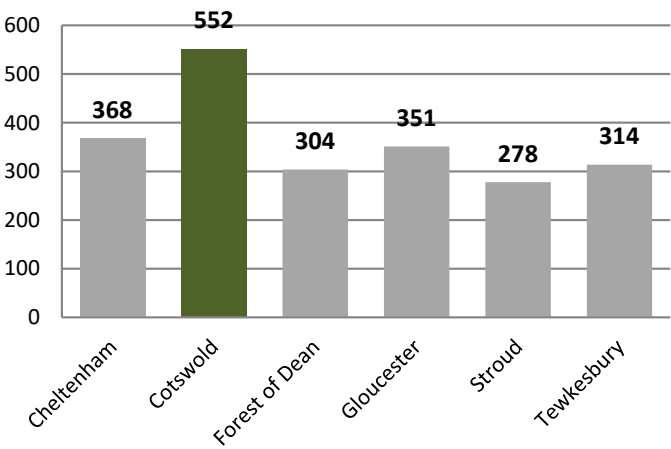
# Value of Tourism 2023

## Cotswold

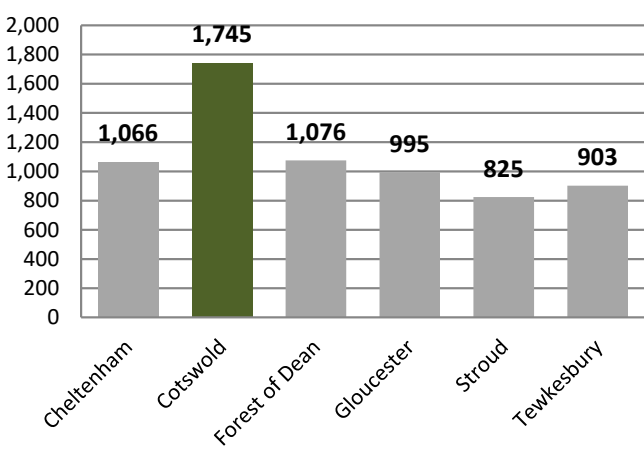
Key Facts	
552,000	Staying visitor trips
1,745,000	Staying visitor nights
£145,025,000	Staying visitor spend
5,348,000	Day visits
£214,037,000	Day visitor spend
£359,062,000	Direct visitor spend
£7,140,000	Other related spend
£366,202,000	TOTAL VISITOR RELATED SPEND
£413,987,000	TOTAL BUSINESS TURNOVER SUPPORTED
6,480	Estimated actual employment
4,650	FTE employment
16%	Proportion of all employment

# Cotswold - Staying visits in the county context

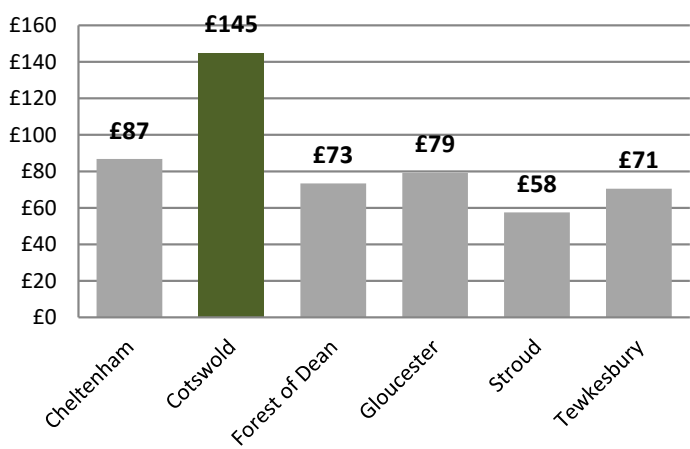
All staying trips



All staying nights



All staying spend



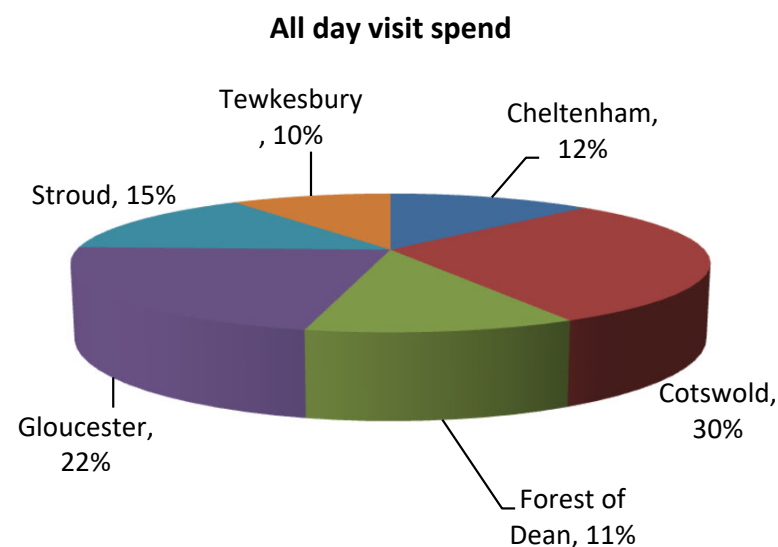
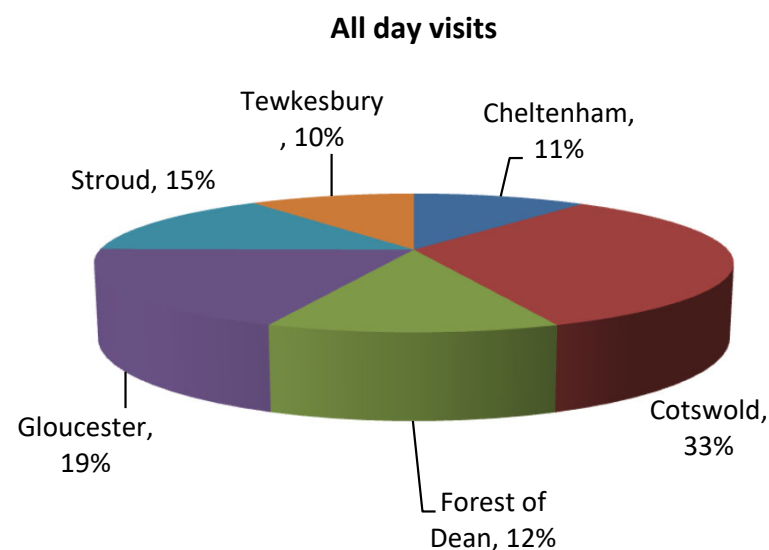
Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	316	52	715	351	£58	£29
Cotswold	486	66	1,240	505	£103	£42
Forest of Dean	266	38	698	378	£47	£26
Gloucester	300	51	651	344	£51	£28
Stroud	240	39	549	276	£37	£20
Tewkesbury	272	42	634	269	£48	£22

# Cotswold - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	146,800	254,000	£34,602,000
Self catering	142,400	441,000	£44,939,000
Touring caravans /tents	63,000	209,000	£10,173,000
Static vans/holiday centres	1,600	5,000	£436,000
Group/campus	8,000	17,000	£856,000
Paying guest in private homes	0	0	£0
Second homes	19,200	71,000	£2,056,000
Boat moorings	3,600	12,000	£800,000
Other	2,300	7,000	£532,000
Staying with friends and relatives	99,000	225,000	£8,875,000
Total	486,000	1,240,000	£103,270,000

Overseas tourists	Trips	Nights	Spend
Serviced	28,400	94,000	£15,571,000
Self catering	8,500	114,000	£7,443,000
Touring caravans /tents	4,700	19,000	£1,274,000
Static vans/holiday centres	0	0	£10,000
Group/campus	3,200	68,000	£4,828,000
Paying guest in private homes	700	11,000	£606,000
Second homes	2,900	46,000	£3,462,000
Boat moorings	0	0	£0
Other	2,500	7,000	£779,000
Staying with friends and relatives	14,900	145,000	£7,782,000
Total	66,000	505,000	£41,755,000

# Cotswold - Day visits in the county context

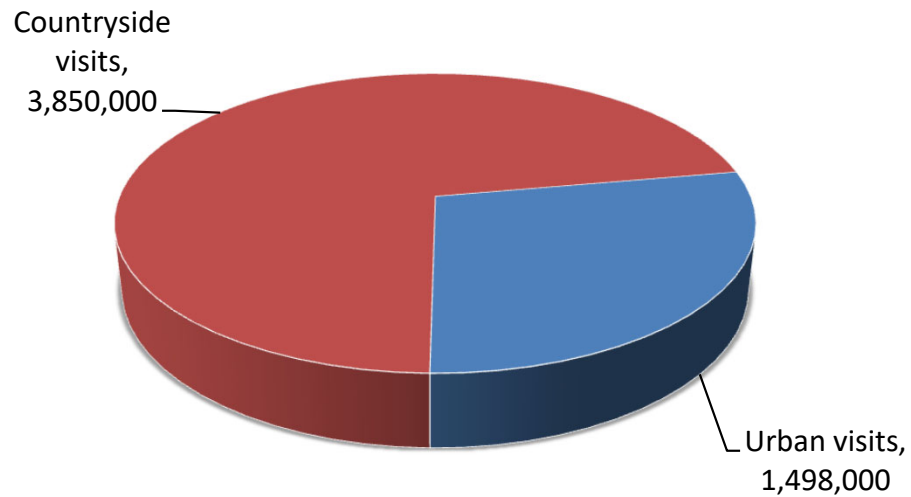


Area	Day visits	Day visit spend
Cheltenham	1.7	£89.2
Cotswold	5.3	£214.0
Forest of Dean	2.0	£82.4
Gloucester	3.0	£158.7
Stroud	2.4	£105.5
Tewkesbury	1.6	£70.1

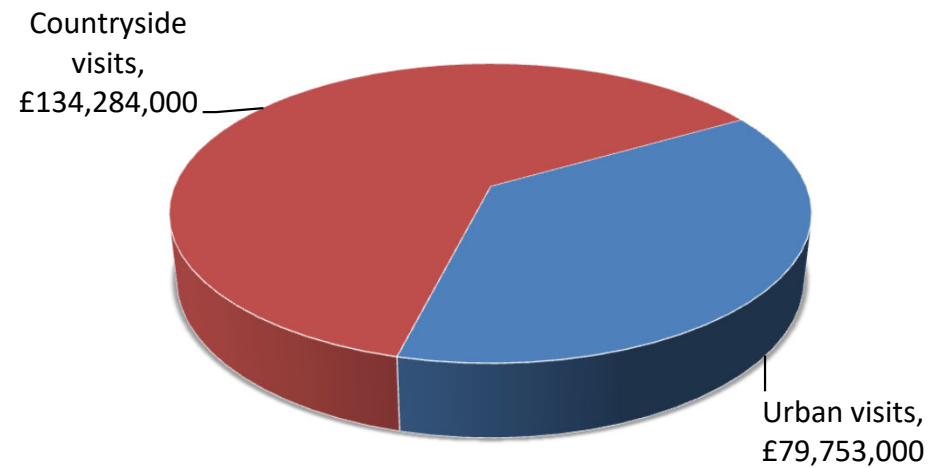
## Cotswold - Day visits by location

Total day visits	Total day visit spend
5,348,000	£214,037,000

**Day visits**



**Day visit spend**



# Cotswold – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £37,570,000
- Overseas staying visitors £11,341,000

### Totals

**£48,911,000 (14%)**



## Shopping

- UK staying visitors £13,907,000
- Overseas staying visitors £12,887,000
- Day visitors £63,833,000

**£90,627,000 (25%)**



## Food & drink

- UK staying visitors £21,866,000
- Overseas staying visitors £8,828,000
- Day visitors £87,439,000

**£118,133,000 (33%)**



## Attractions/entertainment

- UK staying visitors £10,774,000
- Overseas staying visitors £4,229,000
- Day visitors £30,253,000

**£45,256,000 (13%)**



## Travel

- UK staying visitors £19,152,000
- Overseas staying visitors £4,470,000
- Day visitors £32,512,000

**£56,134,000 (16%)**

## Cotswold – Other visitor related expenditure by category



Second Homes

£1,187,000



Boats

£251,000



Visiting friends and relatives (non-visitor spend)

£5,702,000

- 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	£49,524,000	£1,749,000	£51,273,000
Retailing	£26,527,000	£63,195,000	£89,722,000
Catering	£29,774,000	£84,816,000	£114,590,000
Attractions/entertainment	£15,578,000	£31,765,000	£47,343,000
Transport	£14,173,000	£19,507,000	£33,680,000
Arising from non trip spend	£7,140,000	£0	£7,140,000
<b>Total Direct</b>	<b>£142,716,000</b>	<b>£201,032,000</b>	<b>£343,748,000</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	£142,716,000	£201,032,000	£343,748,000
Supplier and income induced	£33,952,000	£36,287,000	£70,239,000
<b>Total</b>	<b>£176,668,000</b>	<b>£237,319,000</b>	<b>£413,987,000</b>

# Cotswold – Tourism related employment

## Estimated actual employment



## Full time equivalent employment (FTE's)



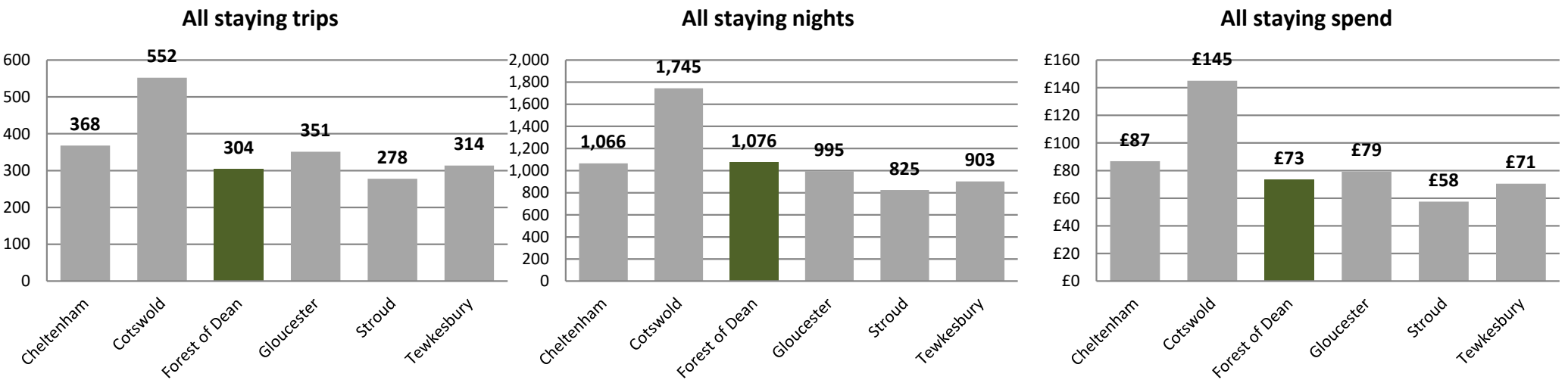
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	591	21	612
Retailing	188	449	637
Catering	339	966	1,306
Attractions/entertainment	266	543	809
Transport	82	114	196
Arising from non trip spend	101	0	101
Total Direct	1,568	2,092	3,660

# Value of Tourism 2023

## Forest of Dean

Key Facts	
304,000	Staying visitor trips
1,076,000	Staying visitor nights
£73,489,000	Staying visitor spend
1,981,000	Day visits
£82,390,000	Day visitor spend
£155,879,000	Direct visitor spend
£5,651,000	Other related spend
£161,530,000	TOTAL VISITOR RELATED SPEND
£183,355,000	TOTAL BUSINESS TURNOVER SUPPORTED
2,789	Estimated actual employment
2,012	FTE employment
6%	Proportion of all employment

# Forest of Dean - Staying visits in the county context



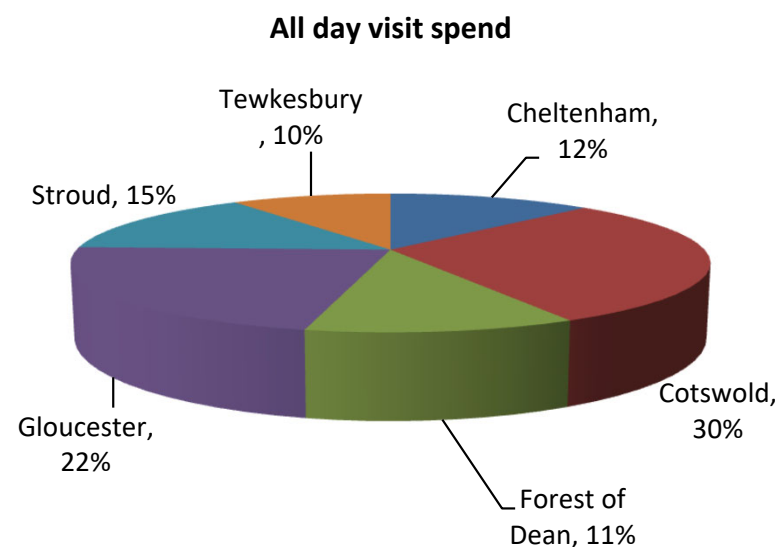
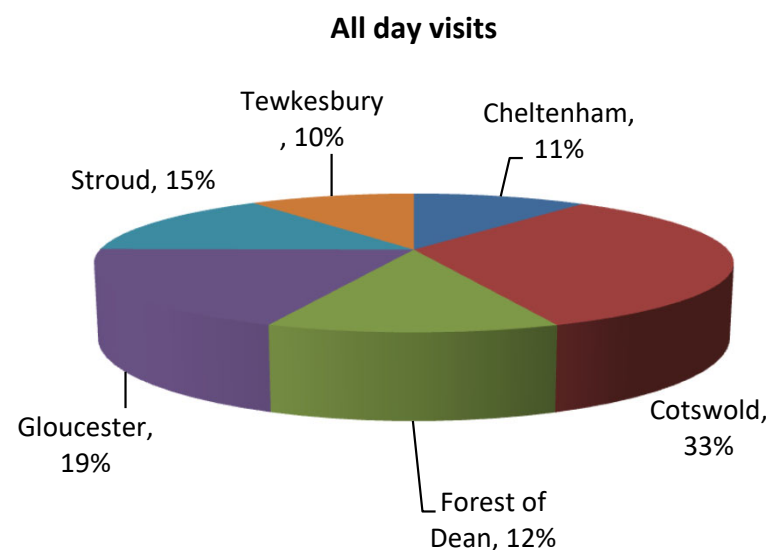
Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	316	52	715	351	£58	£29
Cotswold	486	66	1,240	505	£103	£42
Forest of Dean	266	38	698	378	£47	£26
Gloucester	300	51	651	344	£51	£28
Stroud	240	39	549	276	£37	£20
Tewkesbury	272	42	634	269	£48	£22

# Forest of Dean - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	32,100	55,000	£7,557,000
Self catering	62,000	192,000	£19,552,000
Touring caravans /tents	55,300	184,000	£8,922,000
Static vans/holiday centres	200	1,000	£51,000
Group/campus	16,400	35,000	£1,749,000
Paying guest in private homes	0	0	£0
Second homes	2,400	9,000	£261,000
Boat moorings	0	0	£0
Other	2,300	6,000	£513,000
Staying with friends and relatives	95,500	217,000	£8,561,000
Total	266,000	698,000	£47,165,000

Overseas tourists	Trips	Nights	Spend
Serviced	6,200	21,000	£3,400,000
Self catering	3,700	50,000	£3,238,000
Touring caravans /tents	4,200	17,000	£1,117,000
Static vans/holiday centres	0	0	£1,000
Group/campus	6,600	138,000	£9,871,000
Paying guest in private homes	0	0	£0
Second homes	400	6,000	£440,000
Boat moorings	0	0	£0
Other	2,400	7,000	£751,000
Staying with friends and relatives	14,400	140,000	£7,506,000
Total	38,000	378,000	£26,324,000

# Forest of Dean - Day visits in the county context

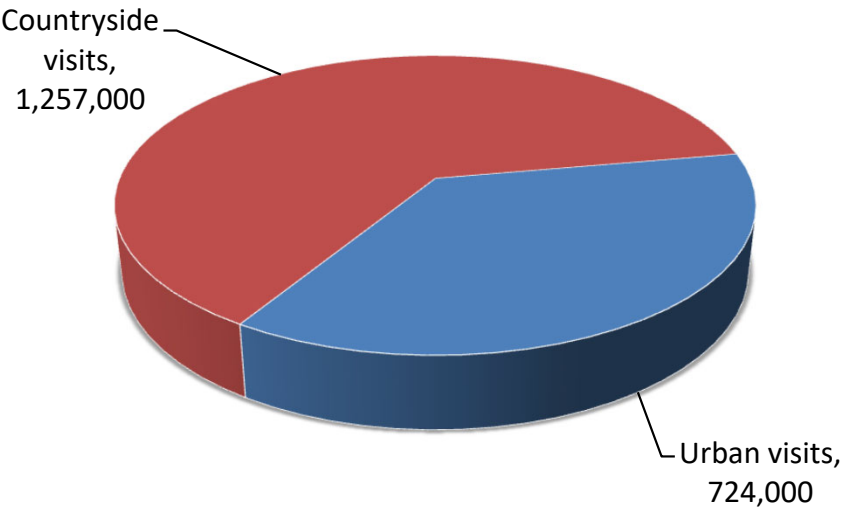


Area	Day visits	Day visit spend
Cheltenham	1.7	£89.2
Cotswold	5.3	£214.0
Forest of Dean	2.0	£82.4
Gloucester	3.0	£158.7
Stroud	2.4	£105.5
Tewkesbury	1.6	£70.1

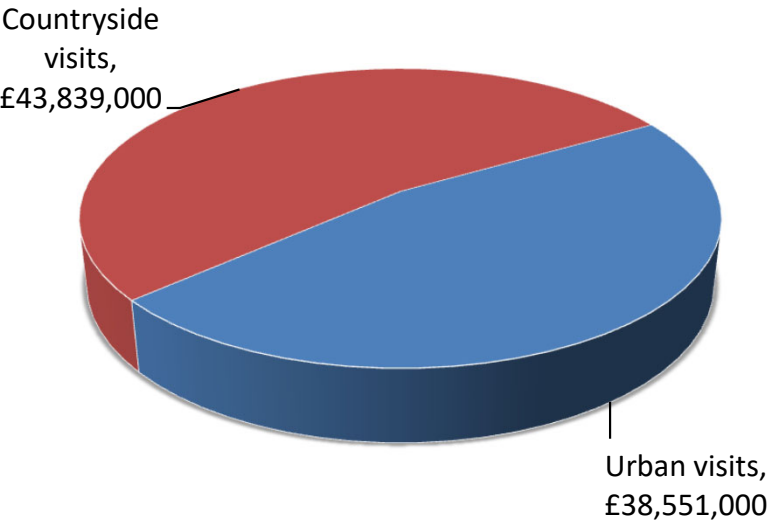
# Forest of Dean - Day visits by location

Total day visits	Total day visit spend
1,981,000	£82,390,000

Day visits



Day visit spend



# Forest of Dean – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £17,159,000
- Overseas staying visitors £7,150,000

### Totals

**£24,309,000 (16%)**



## Shopping

- UK staying visitors £6,352,000
- Overseas staying visitors £8,125,000
- Day visitors £26,520,000

**£40,997,000 (26%)**



## Food & drink

- UK staying visitors £9,987,000
- Overseas staying visitors £5,566,000
- Day visitors £32,958,000

**£48,511,000 (31%)**



## Attractions/entertainment

- UK staying visitors £4,921,000
- Overseas staying visitors £2,666,000
- Day visitors £11,020,000

**£18,607,000 (12%)**



## Travel

- UK staying visitors £8,747,000
- Overseas staying visitors £2,818,000
- Day visitors £11,891,000

**£23,456,000 (15%)**



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



Second Homes  
£151,000



Visiting friends and relatives (non-visitor spend)  
£5,500,000

- 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	£24,620,000	£659,000	£25,279,000
Retailing	£14,332,000	£26,255,000	£40,587,000
Catering	£15,086,000	£31,969,000	£47,055,000
Attractions/entertainment	£7,887,000	£11,615,000	£19,502,000
Transport	£6,939,000	£7,135,000	£14,074,000
Arising from non trip spend	£5,651,000	£0	£5,651,000
<b>Total Direct</b>	<b>£74,515,000</b>	<b>£77,633,000</b>	<b>£152,148,000</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	£74,515,000	£77,633,000	£152,148,000
Supplier and income induced	£17,536,000	£13,671,000	£31,207,000
<b>Total</b>	<b>£92,051,000</b>	<b>£91,304,000</b>	<b>£183,355,000</b>

# Forest of Dean – Tourism related employment

## Estimated actual employment



## Full time equivalent employment (FTE's)



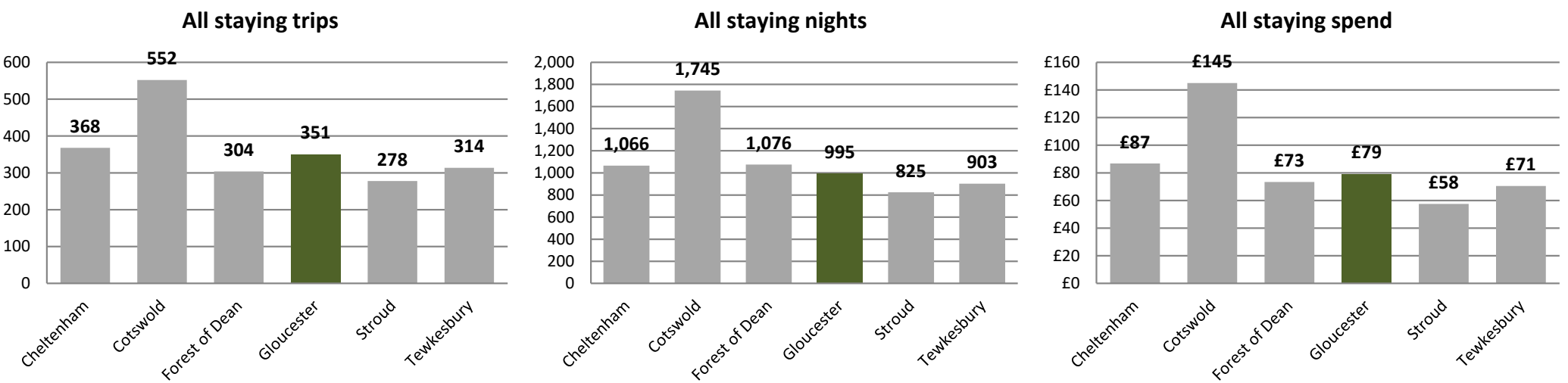
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	285	8	292
Retailing	99	181	279
Catering	166	353	519
Attractions/entertainment	130	192	323
Transport	39	40	79
Arising from non trip spend	80	0	80
<b>Total Direct</b>	<b>799</b>	<b>773</b>	<b>1,572</b>

# Value of Tourism 2023

## Gloucester

Key Facts	
350,900	Staying visitor trips
995,000	Staying visitor nights
£79,241,000	Staying visitor spend
3,047,000	Day visits
£158,714,000	Day visitor spend
£237,955,000	Direct visitor spend
£8,455,000	Other related spend
£246,410,000	TOTAL VISITOR RELATED SPEND
£310,110,000	TOTAL BUSINESS TURNOVER SUPPORTED
4,235	Estimated actual employment
3,138	FTE employment
5%	Proportion of all employment

# Gloucester - Staying visits in the county context



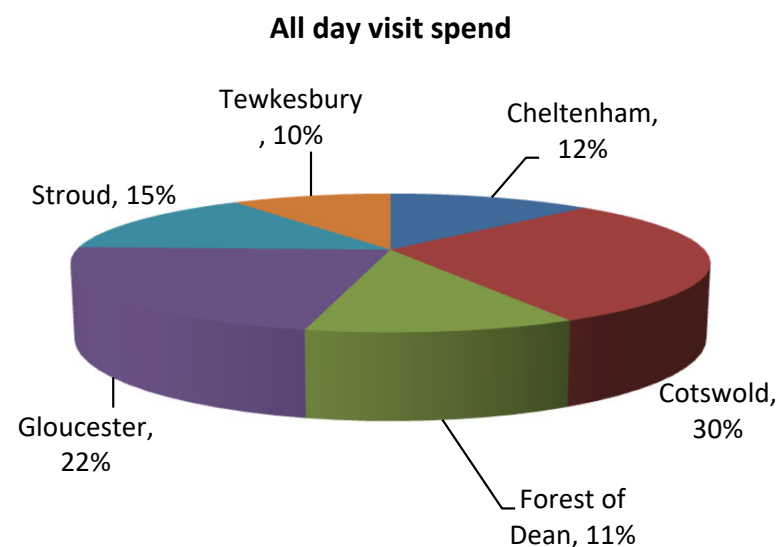
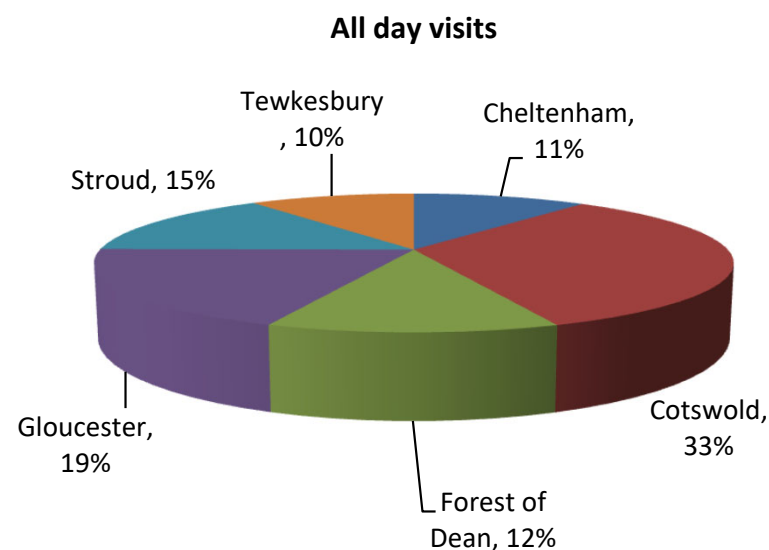
Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	316	52	715	351	£58	£29
Cotswold	486	66	1,240	505	£103	£42
Forest of Dean	266	38	698	378	£47	£26
Gloucester	300	51	651	344	£51	£28
Stroud	240	39	549	276	£37	£20
Tewkesbury	272	42	634	269	£48	£22

# Gloucester - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	117,100	203,000	£27,598,000
Self catering	28,000	87,000	£8,844,000
Touring caravans /tents	4,800	16,000	£768,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	2,100	8,000	£220,000
Boat moorings	2,000	6,000	£440,000
Other	3,400	10,000	£764,000
Staying with friends and relatives	142,100	323,000	£12,748,000
Total	299,500	651,000	£51,383,000

Overseas tourists	Trips	Nights	Spend
Serviced	22,600	75,000	£12,419,000
Self catering	1,700	22,000	£1,465,000
Touring caravans /tents	400	1,000	£96,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	1,500	22,000	£1,212,000
Second homes	300	5,000	£371,000
Boat moorings	0	0	£0
Other	3,500	11,000	£1,118,000
Staying with friends and relatives	21,400	208,000	£11,177,000
Total	51,400	344,000	£27,858,000

# Gloucester - Day visits in the county context

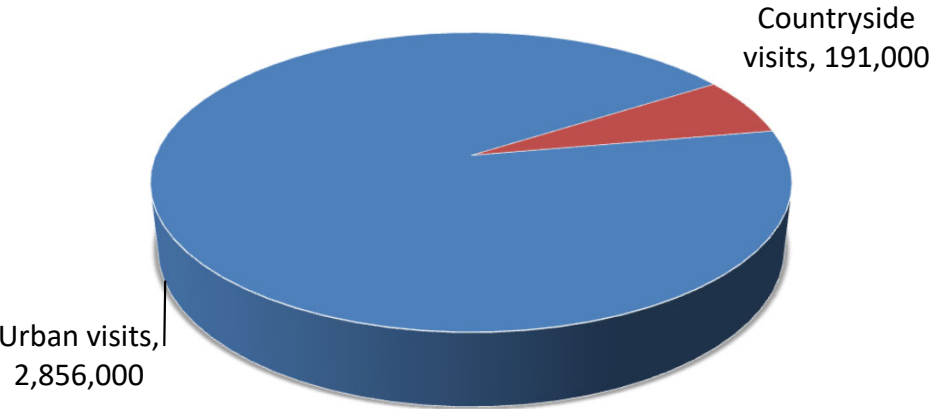


Area	Day visits	Day visit spend
Cheltenham	1.7	£89.2
Cotswold	5.3	£214.0
Forest of Dean	2.0	£82.4
Gloucester	3.0	£158.7
Stroud	2.4	£105.5
Tewkesbury	1.6	£70.1

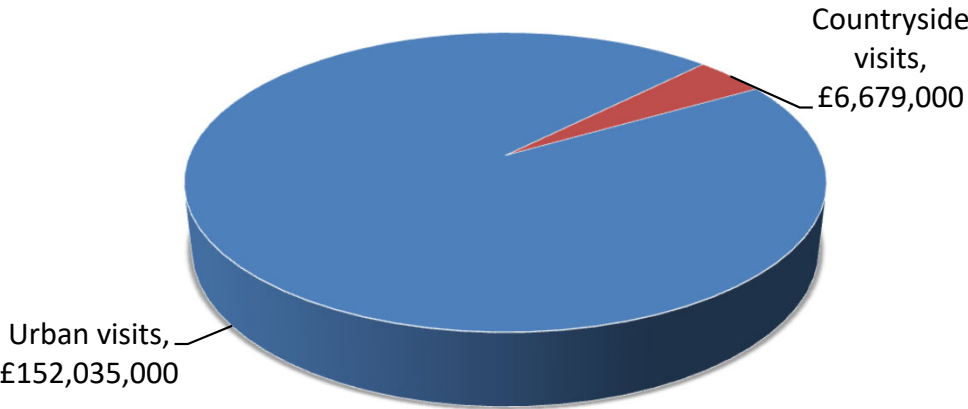
# Gloucester - Day visits by location

Total day visits	Total day visit spend
3,047,000	£158,714,000

Day visits



Day visit spend





# Gloucester – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £18,693,000
- Overseas staying visitors £7,566,000

### Totals

**£26,259,000 (11%)**



## Shopping

- UK staying visitors £6,920,000
- Overseas staying visitors £8,598,000
- Day visitors £70,391,000

**£85,909,000 (36%)**



## Food & drink

- UK staying visitors £10,880,000
- Overseas staying visitors £5,890,000
- Day visitors £56,555,000

**£73,325,000 (31%)**



## Attractions/entertainment

- UK staying visitors £5,361,000
- Overseas staying visitors £2,821,000
- Day visitors £15,040,000

**£23,222,000 (10%)**



## Travel

- UK staying visitors £9,529,000
- Overseas staying visitors £2,982,000
- Day visitors £16,729,000

**£29,240,000 (12%)**

## Gloucester – Other visitor related expenditure by category



Second Homes

£127,000



Boats

£138,000



Visiting friends and relatives (non-visitor spend)

£8,190,000

- 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	£26,595,000	£1,131,000	£27,726,000
Retailing	£15,363,000	£69,687,000	£85,050,000
Catering	£16,267,000	£54,858,000	£71,125,000
Attractions/entertainment	£8,505,000	£16,309,000	£24,814,000
Transport	£7,507,000	£10,038,000	£17,545,000
Arising from non trip spend	£8,455,000	£0	£8,455,000
<b>Total Direct</b>	<b>£82,692,000</b>	<b>£152,023,000</b>	<b>£234,715,000</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	£82,692,000	£152,023,000	£234,715,000
Supplier and income induced	£32,363,000	£43,032,000	£75,395,000
<b>Total</b>	<b>£115,055,000</b>	<b>£195,055,000</b>	<b>£310,110,000</b>

# Gloucester – Tourism related employment

## Estimated actual employment



## Full time equivalent employment (FTE's)



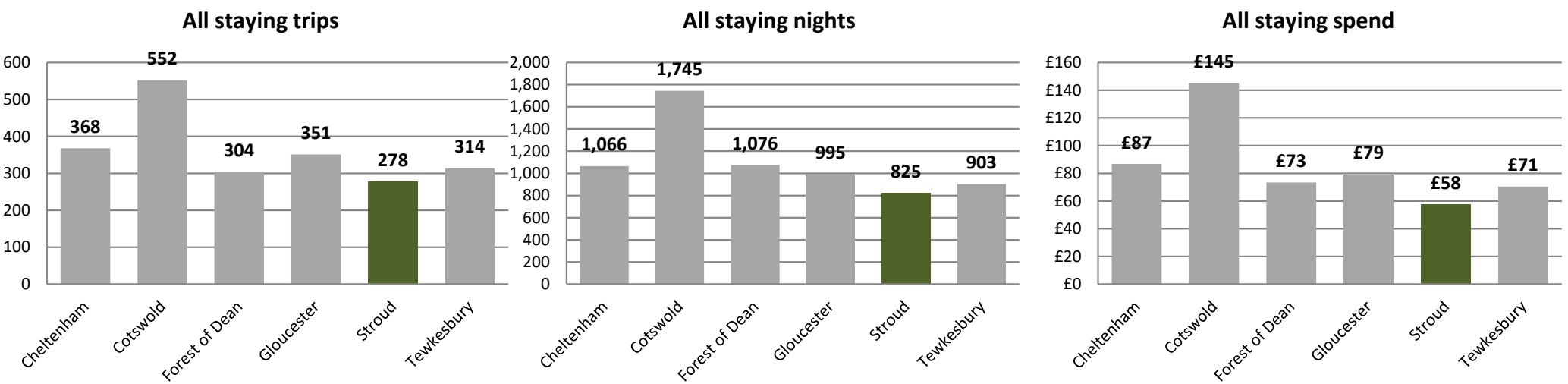
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	273	12	285
Retailing	94	426	520
Catering	160	538	698
Attractions/entertainment	125	240	365
Transport	38	50	88
Arising from non trip spend	119	0	119
Total Direct	809	1,266	2,075

# Value of Tourism 2023

## Stroud

Key Facts	
278,000	Staying visitor trips
825,000	Staying visitor nights
£57,610,000	Staying visitor spend
2,371,000	Day visits
£105,472,000	Day visitor spend
£163,082,000	Direct visitor spend
£7,380,000	Other related spend
£170,462,000	TOTAL VISITOR RELATED SPEND
£215,006,000	TOTAL BUSINESS TURNOVER SUPPORTED
3,007	Estimated actual employment
2,236	FTE employment
4%	Proportion of all employment

# Stroud - Staying visits in the county context



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	316	52	715	351	£58	£29
Cotswold	486	66	1,240	505	£103	£42
Forest of Dean	266	38	698	378	£47	£26
Gloucester	300	51	651	344	£51	£28
Stroud	240	39	549	276	£37	£20
Tewkesbury	272	42	634	269	£48	£22

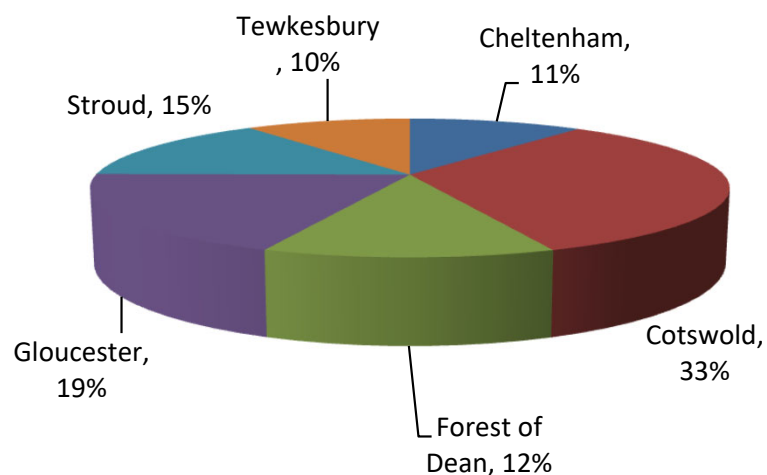
## Stroud - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	64,000	111,000	£15,083,000
Self catering	21,400	66,000	£6,749,000
Touring caravans /tents	13,100	43,000	£2,111,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	4,000	15,000	£424,000
Boat moorings	1,400	4,000	£304,000
Other	3,100	9,000	£712,000
Staying with friends and relatives	132,500	301,000	£11,883,000
Total	239,500	549,000	£37,266,000

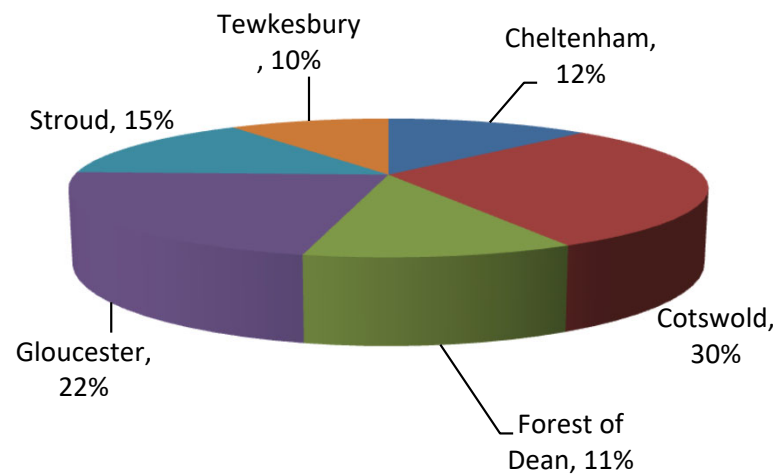
Overseas tourists	Trips	Nights	Spend
Serviced	12,400	41,000	£6,787,000
Self catering	1,300	17,000	£1,118,000
Touring caravans /tents	1,000	4,000	£264,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	600	9,000	£714,000
Boat moorings	0	0	£0
Other	3,300	10,000	£1,042,000
Staying with friends and relatives	20,000	194,000	£10,418,000
Total	38,500	276,000	£20,344,000

# Stroud - Day visits in the county context

**All day visits**



**All day visit spend**



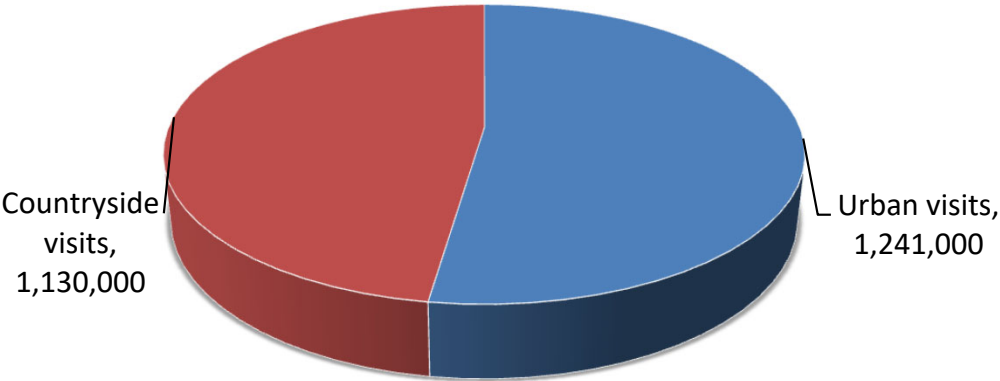
Area	Day visits	Day visit spend
Cheltenham	1.7	£89.2
Cotswold	5.3	£214.0
Forest of Dean	2.0	£82.4
Gloucester	3.0	£158.7
Stroud	2.4	£105.5
Tewkesbury	1.6	£70.1



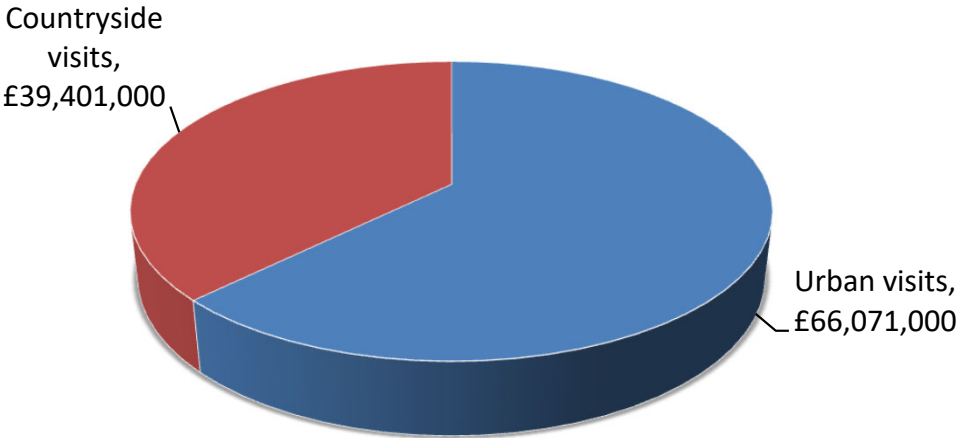
# Stroud - Day visits by location

Total day visits	Total day visit spend
2,371,000	£105,472,000

Day visits



Day visit spend



# Stroud – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £13,557,000
- Overseas staying visitors £5,526,000

### Totals

**£19,083,000 (12%)**



## Shopping

- UK staying visitors £5,019,000
- Overseas staying visitors £6,279,000
- Day visitors £38,100,000

**£49,398,000 (30%)**



## Food & drink

- UK staying visitors £7,891,000
- Overseas staying visitors £4,301,000
- Day visitors £40,701,000

**£52,893,000 (32%)**



## Attractions/entertainment

- UK staying visitors £3,888,000
- Overseas staying visitors £2,060,000
- Day visitors £12,777,000

**£18,725,000 (11%)**



## Travel

- UK staying visitors £6,911,000
- Overseas staying visitors £2,178,000
- Day visitors £13,895,000

**£22,984,000 (14%)**

## Stroud – Other visitor related expenditure by category



Second Homes  
£245,000



Boats  
£95,000



Visiting friends and relatives (non-visitor spend)  
£7,040,000

- 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	£19,327,000	£814,000	£20,141,000
Retailing	£11,185,000	£37,719,000	£48,904,000
Catering	£11,826,000	£39,480,000	£51,306,000
Attractions/entertainment	£6,183,000	£13,565,000	£19,748,000
Transport	£5,454,000	£8,337,000	£13,791,000
Arising from non trip spend	£7,380,000	£0	£7,380,000
<b>Total Direct</b>	<b>£61,355,000</b>	<b>£99,915,000</b>	<b>£161,270,000</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	£61,355,000	£99,915,000	£161,270,000
Supplier and income induced	£23,976,000	£29,760,000	£53,736,000
<b>Total</b>	<b>£85,331,000</b>	<b>£129,675,000</b>	<b>£215,006,000</b>

# Stroud – Tourism related employment

## Estimated actual employment



## Full time equivalent employment (FTE's)



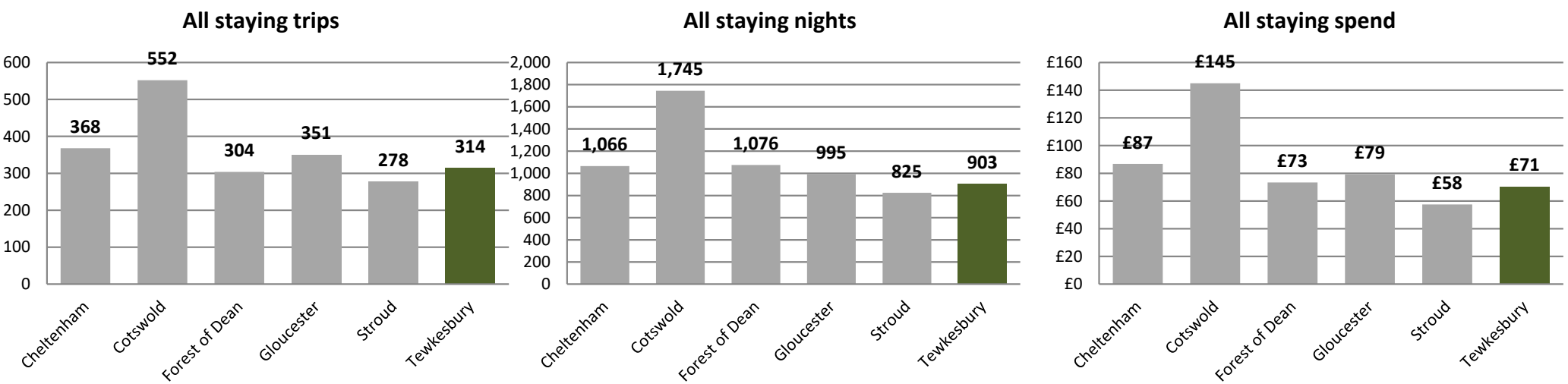
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	199	8	208
Retailing	69	232	300
Catering	117	389	505
Attractions/entertainment	91	200	292
Transport	27	42	69
Arising from non trip spend	104	0	104
<b>Total Direct</b>	<b>607</b>	<b>871</b>	<b>1,479</b>

# Value of Tourism 2023

## Tewkesbury

Key Facts	
313,900	Staying visitor trips
903,000	Staying visitor nights
£70,514,000	Staying visitor spend
1,618,000	Day visits
£70,106,000	Day visitor spend
£140,620,000	Direct visitor spend
£7,111,000	Other related spend
£147,731,000	TOTAL VISITOR RELATED SPEND
£167,482,000	TOTAL BUSINESS TURNOVER SUPPORTED
2,266	Estimated actual employment
1,651	FTE employment
5%	Proportion of all employment

# Tewkesbury - Staying visits in the county context



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	316	52	715	351	£58	£29
Cotswold	486	66	1,240	505	£103	£42
Forest of Dean	266	38	698	378	£47	£26
Gloucester	300	51	651	344	£51	£28
Stroud	240	39	549	276	£37	£20
Tewkesbury	272	42	634	269	£48	£22

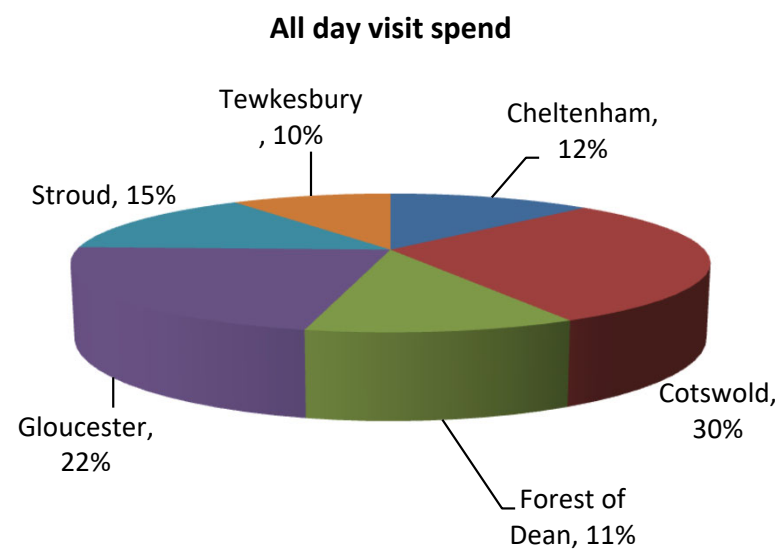
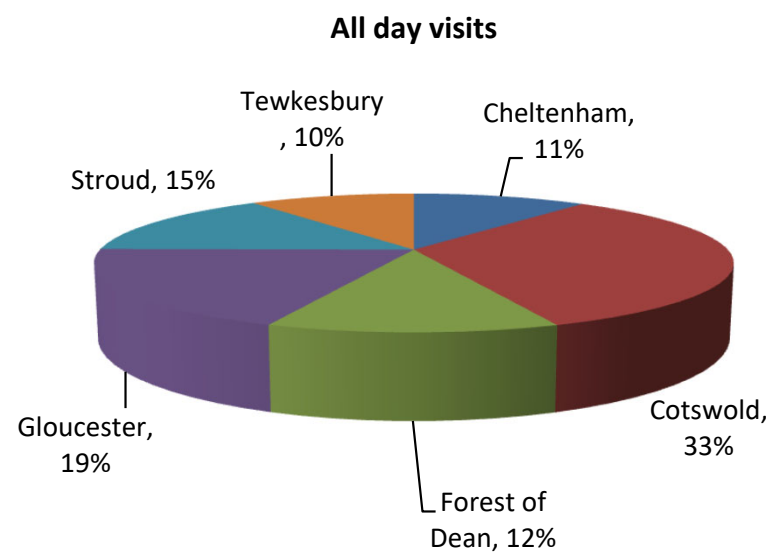
# Tewkesbury - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	95,100	164,000	£22,412,000
Self catering	26,500	82,000	£8,368,000
Touring caravans /tents	27,100	90,000	£4,369,000
Static vans/holiday centres	400	1,000	£103,000
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	2,100	8,000	£228,000
Boat moorings	12,600	41,000	£2,802,000
Other	2,500	7,000	£569,000
Staying with friends and relatives	105,900	240,000	£9,494,000
Total	272,200	634,000	£48,345,000

Overseas tourists	Trips	Nights	Spend
Serviced	18,400	61,000	£10,085,000
Self catering	1,600	21,000	£1,386,000
Touring caravans /tents	2,000	8,000	£547,000
Static vans/holiday centres	0	0	£2,000
Group/campus	0	0	£0
Paying guest in private homes	700	11,000	£606,000
Second homes	300	5,000	£385,000
Boat moorings	0	0	£0
Other	2,600	8,000	£833,000
Staying with friends and relatives	16,000	155,000	£8,324,000
Total	41,700	269,000	£22,169,000



# Tewkesbury - Day visits in the county context

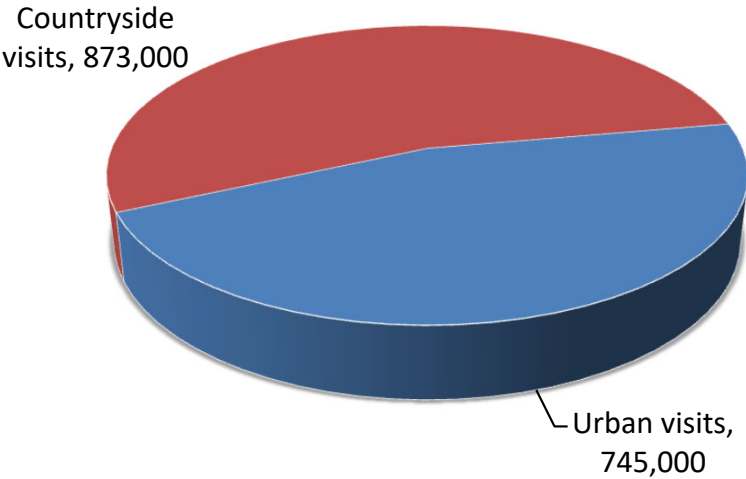


Area	Day visits	Day visit spend
Cheltenham	1.7	£89.2
Cotswold	5.3	£214.0
Forest of Dean	2.0	£82.4
Gloucester	3.0	£158.7
Stroud	2.4	£105.5
Tewkesbury	1.6	£70.1

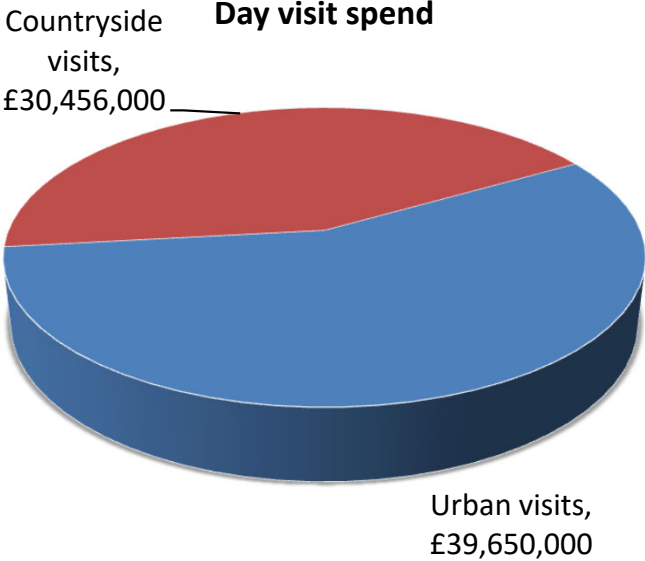
# Tewkesbury - Day visits by location

Total day visits	Total day visit spend
1,618,000	£70,106,000

Day visits



Day visit spend



# Tewkesbury – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £17,588,000
- Overseas staying visitors £6,021,000

### Totals

**£23,609,000 (17%)**



## Shopping

- UK staying visitors £6,511,000
- Overseas staying visitors £6,842,000
- Day visitors £24,266,000

**£37,619,000 (27%)**



## Food & drink

- UK staying visitors £10,237,000
- Overseas staying visitors £4,687,000
- Day visitors £27,434,000

**£42,358,000 (30%)**



## Attractions/entertainment

- UK staying visitors £5,044,000
- Overseas staying visitors £2,245,000
- Day visitors £8,832,000

**£16,121,000 (11%)**



## Travel

- UK staying visitors £8,966,000
- Overseas staying visitors £2,373,000
- Day visitors £9,574,000

**£20,913,000 (15%)**

## Tewkesbury – Other visitor related expenditure by category



Second Homes  
£132,000



Boats  
£879,000



Visiting friends and relatives (non-visitor spend)  
£6,100,000

- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay with them.

## Tewkesbury – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£23,907,000	£549,000	£24,456,000
Retailing	£13,219,000	£24,023,000	£37,242,000
Catering	£14,476,000	£26,611,000	£41,087,000
Attractions/entertainment	£7,572,000	£9,349,000	£16,921,000
Transport	£6,803,000	£5,745,000	£12,548,000
Arising from non trip spend	£7,111,000	£0	£7,111,000
<b>Total Direct</b>	<b>£73,088,000</b>	<b>£66,277,000</b>	<b>£139,365,000</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	£73,088,000	£66,277,000	£139,365,000
Supplier and income induced	£16,990,000	£11,127,000	£28,117,000
<b>Total</b>	<b>£90,078,000</b>	<b>£77,404,000</b>	<b>£167,482,000</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	78	142	220
Catering	137	253	390
Attractions/entertainment	108	133	241
Transport	33	28	61
Arising from non trip spend	100	0	100
Total Direct	694	561	1,255