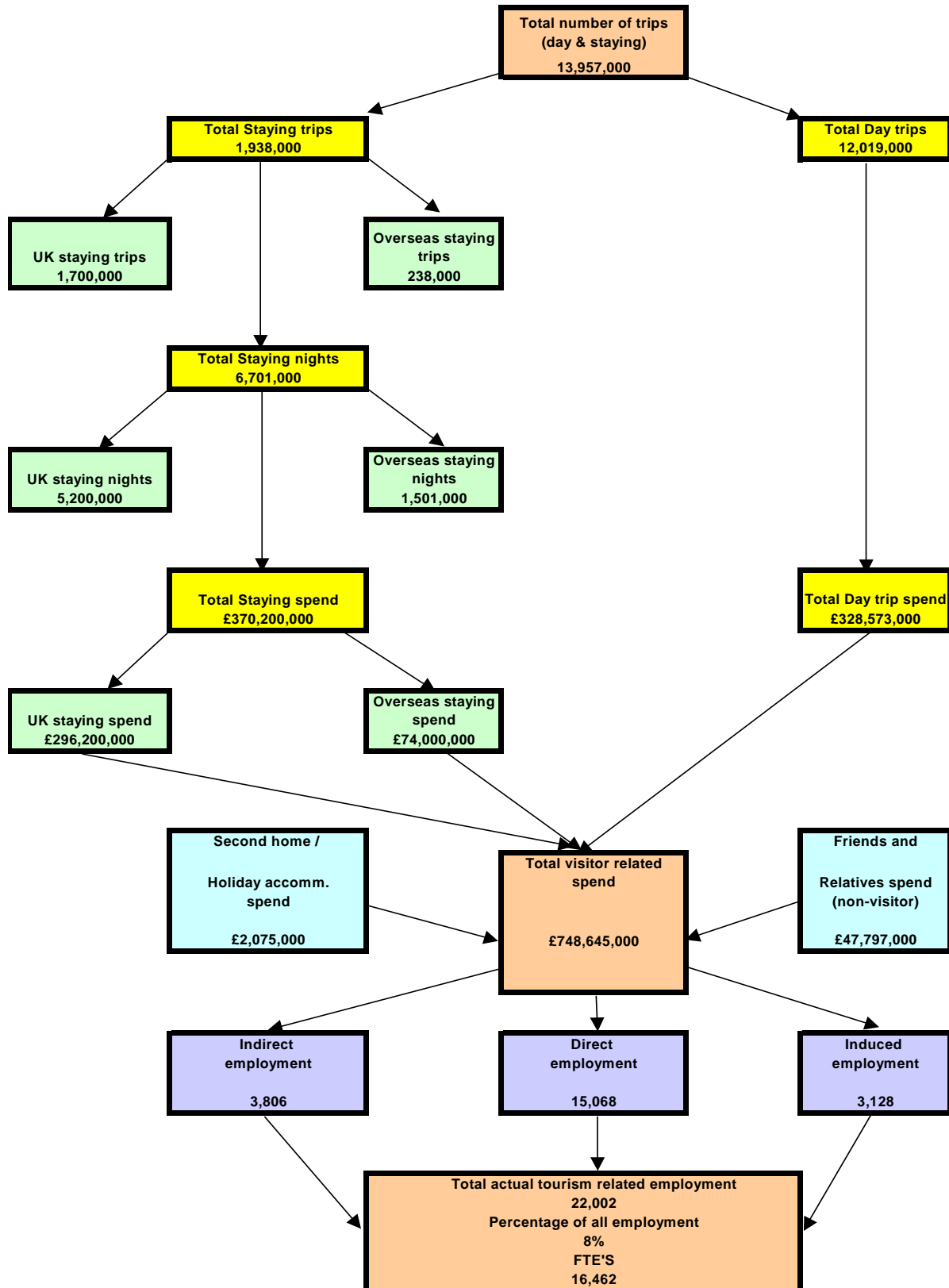
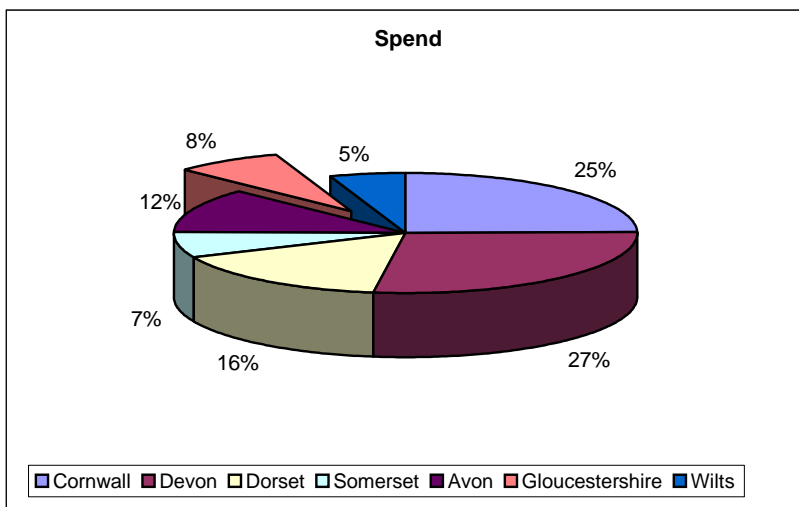
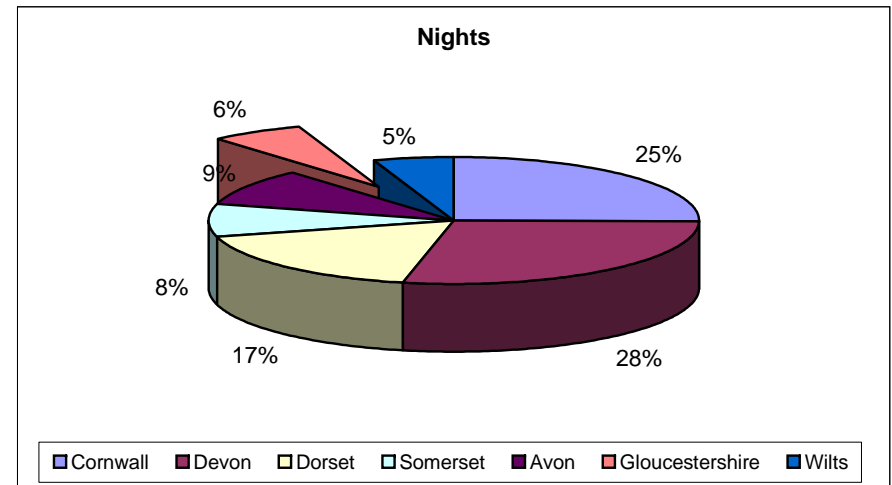
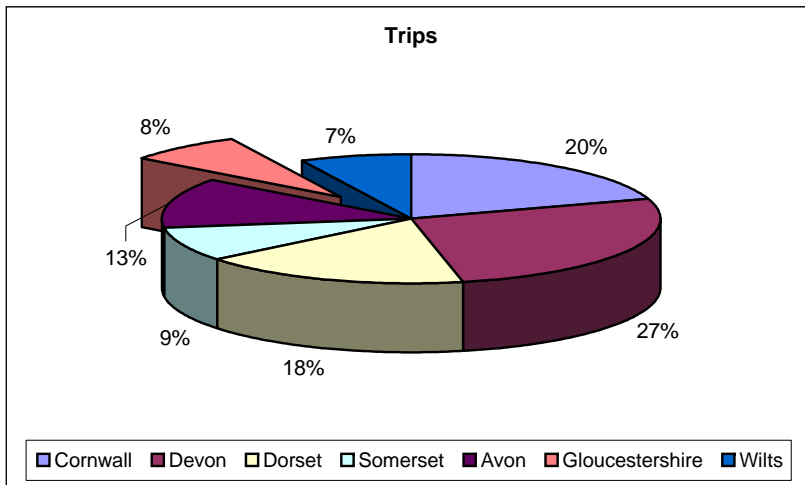


7. Gloucestershire Economic Overview

Gloucestershire: Facts at a glance



Gloucestershire: Staying visitors in context



| | Trips | Nights | Spend |
|------------------------|-------------------|--------------------|-----------------------|
| Cornwall | 5,142,000 | 27,395,000 | £ 1,215,900,000 |
| Devon | 6,824,000 | 30,331,000 | £ 1,343,600,000 |
| Dorset | 4,520,000 | 18,684,000 | £ 794,600,000 |
| Somerset | 2,185,000 | 9,063,000 | £ 340,011,000 |
| Avon | 3,238,000 | 10,111,000 | £ 576,927,000 |
| Gloucestershire | 1,938,000 | 6,701,000 | £370,200,000 |
| Wilts | 1,843,000 | 5,749,000 | £ 259,500,000 |
| TOTALS | 25,690,000 | 108,034,000 | £4,900,738,000 |

Gloucestershire: Staying visitors in detail

KEY FACTS:

- Gloucestershire generates 8% (1.9 million) of trips, 6% (6.7 million) of nights and 8% (£370.2 million) of spend in the South West region
- Visitors staying with friends and relatives account for the largest proportions of trips and nights whilst the serviced accommodation sector generates the largest proportion of spend in the county.
- All staying visitors combined generate an average spend per trip of £191.02 and an average spend per night of £55.25.

Trips, nights and spend by accommodation (Domestic tourists)

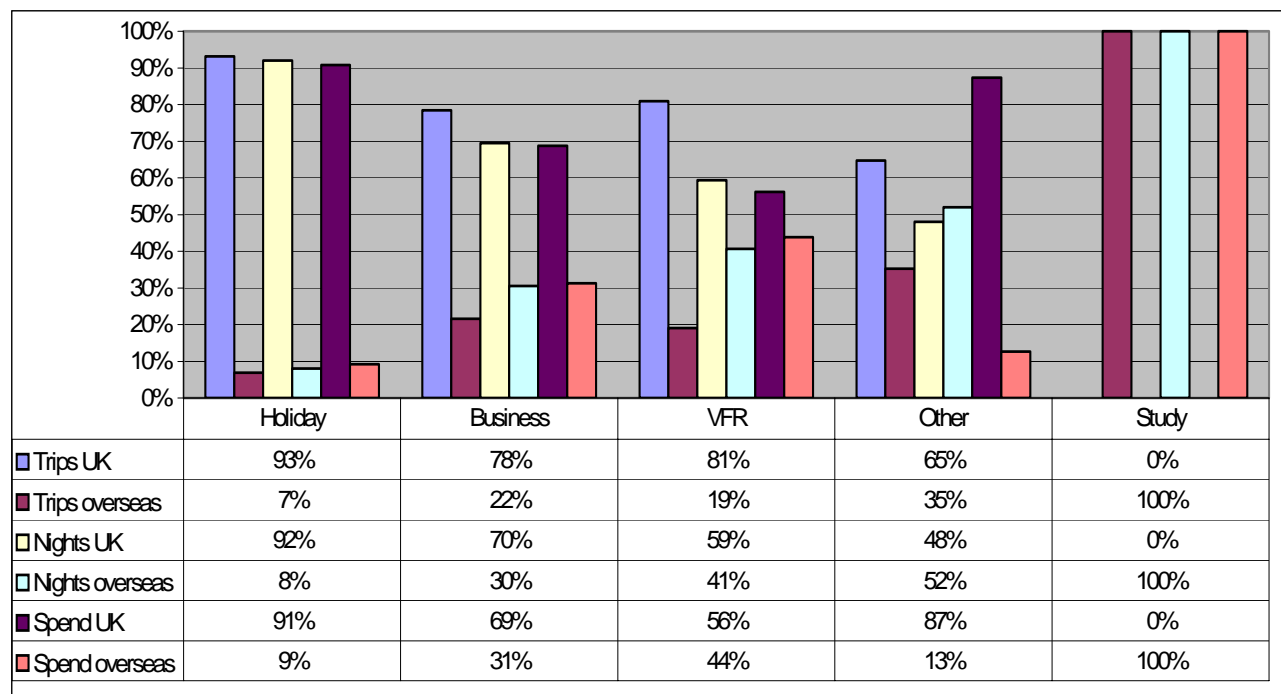
| | Trips | Nights | Spend |
|------------------------------------|------------------|------------------|---------------------|
| Serviced | 538,000 | 1,345,000 | £131,079,000 |
| Self catering | 153,000 | 778,000 | £41,661,000 |
| Touring caravans/tents | 108,000 | 440,000 | £12,207,000 |
| Static vans/holiday centres | 3,000 | 9,000 | £509,000 |
| Group/campus | 22,000 | 92,000 | £4,390,000 |
| Paying guest in private house | 0 | 0 | £0 |
| Second homes | 39,000 | 212,000 | £10,984,000 |
| Boat moorings | 2,000 | 3,000 | £169,000 |
| Other | 54,000 | 120,000 | £8,210,000 |
| Staying with friends and relatives | 782,000 | 2,201,000 | £86,990,000 |
| Total | 1,700,000 | 5,200,000 | £296,200,000 |

Trips, nights and spend by accommodation (Overseas tourists)

| | Trips | Nights | Spend |
|------------------------------------|----------------|------------------|--------------------|
| Serviced | 116,000 | 413,000 | £38,401,000 |
| Self catering | 4,000 | 97,000 | £3,406,000 |
| Touring caravans/tents | 5,000 | 33,000 | £735,000 |
| Static vans/holiday centres | 0 | 1,000 | £22,000 |
| Group/campus | 7,000 | 70,000 | £4,180,000 |
| Paying guest in private house | 1,000 | 52,000 | £1,554,000 |
| Second homes | 5,000 | 85,000 | £2,474,000 |
| Boat moorings | 0 | 0 | £0 |
| Other | 6,000 | 9,000 | £516,000 |
| Staying with friends and relatives | 93,000 | 743,000 | £22,714,000 |
| Total | 238,000 | 1,501,000 | £74,000,000 |

NOTE – Some figures will appear as '0' when there is actual tourism activity connected with the accommodation type or purpose of trip type. This is due to the rounding built in to the Cambridge Model which rounds numbers to the nearest thousand, so if the number is less than 500 this will appear in the report as '0'.

Trips, nights and spend by purpose



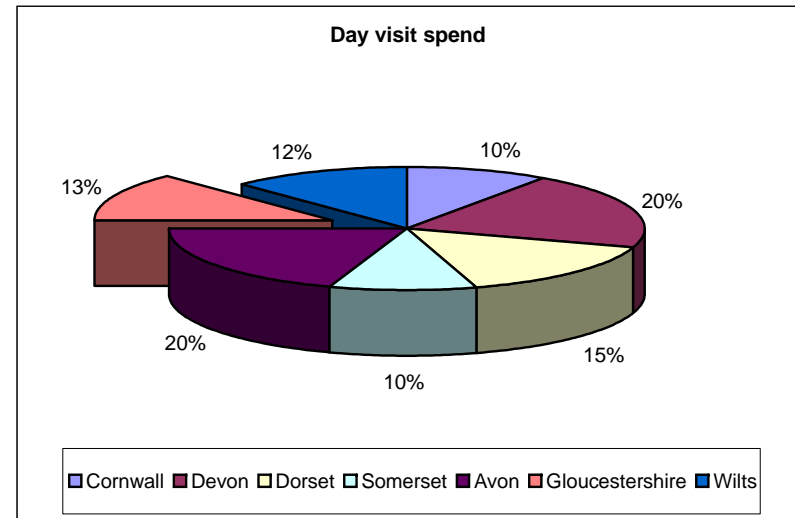
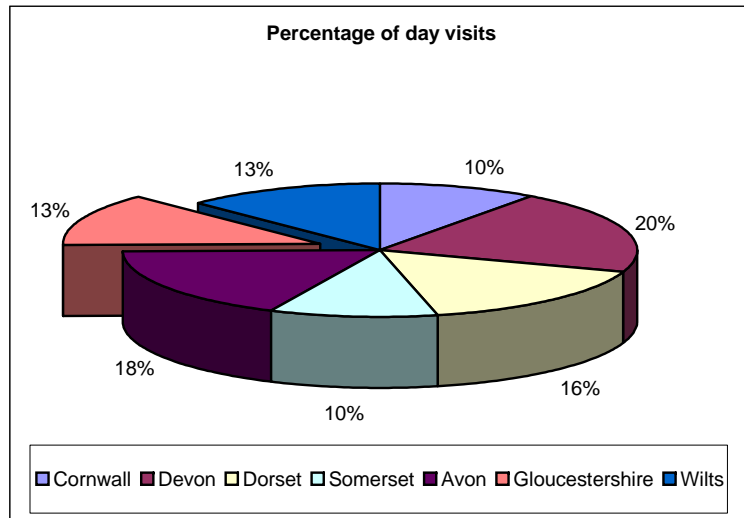
Trips, nights and spend by purpose (Domestic Tourists)

| | Trips | Nights | Spend |
|--------------|------------------|------------------|---------------------|
| Holiday | 1,120,000 | 3,678,000 | £ 197,698,000 |
| Business | 171,000 | 397,000 | £ 41,348,000 |
| VFR | 387,000 | 934,000 | £ 30,551,000 |
| Other | 22,000 | 191,000 | £ 26,603,000 |
| Study | 0 | 0 | £ 0 |
| Total | 1,700,000 | 5,200,000 | £296,200,000 |

Trips, nights and spend by purpose (Overseas Tourists)

| | Trips | Nights | Spend |
|--------------|----------------|------------------|--------------------|
| Holiday | 83,000 | 318,000 | £ 20,122,000 |
| Business | 47,000 | 174,000 | £ 18,836,000 |
| VFR | 91,000 | 640,000 | £ 23,798,000 |
| Other | 12,000 | 207,000 | £ 3,853,000 |
| Study | 5,000 | 162,000 | £ 7,391,000 |
| Total | 238,000 | 1,501,000 | £74,000,000 |

Gloucestershire: Day visits in context

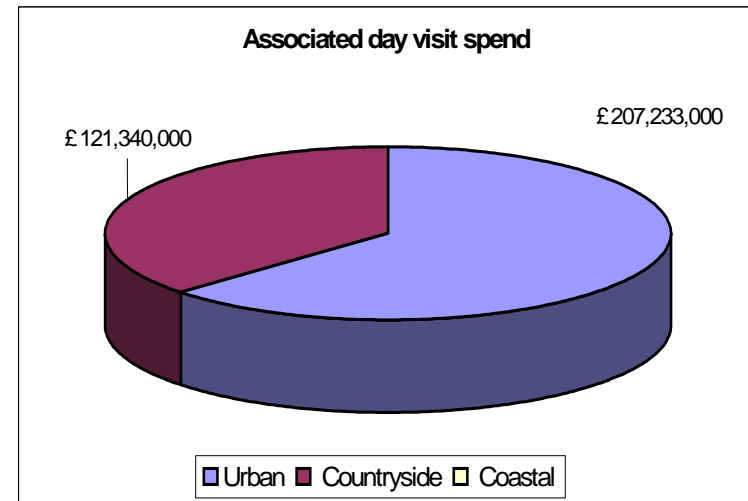
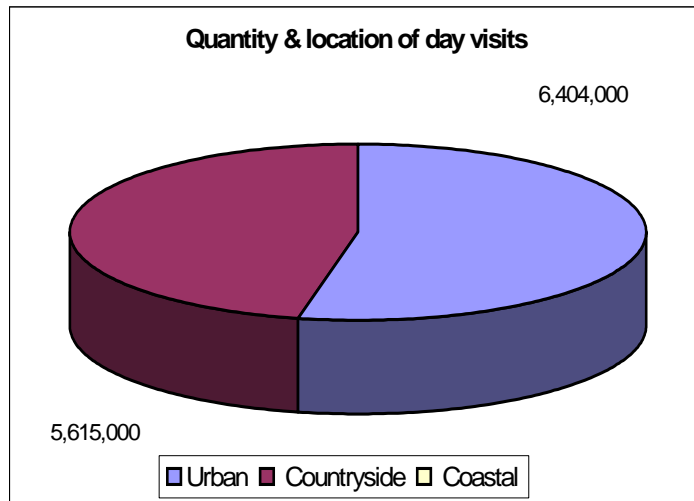


| | Trips | Spend |
|------------------------|-------------------|-----------------------|
| Cornwall | 9,576,000 | £ 254,812,000 |
| Devon | 19,333,000 | £ 524,256,680 |
| Dorset | 15,333,000 | £ 390,968,870 |
| Somerset | 9,927,000 | £ 262,019,000 |
| Avon | 17,059,000 | £ 509,903,240 |
| Gloucestershire | 12,019,000 | £328,573,000 |
| Wilts | 11,936,000 | £ 317,162,000 |
| Totals | 95,183,000 | £2,587,694,790 |

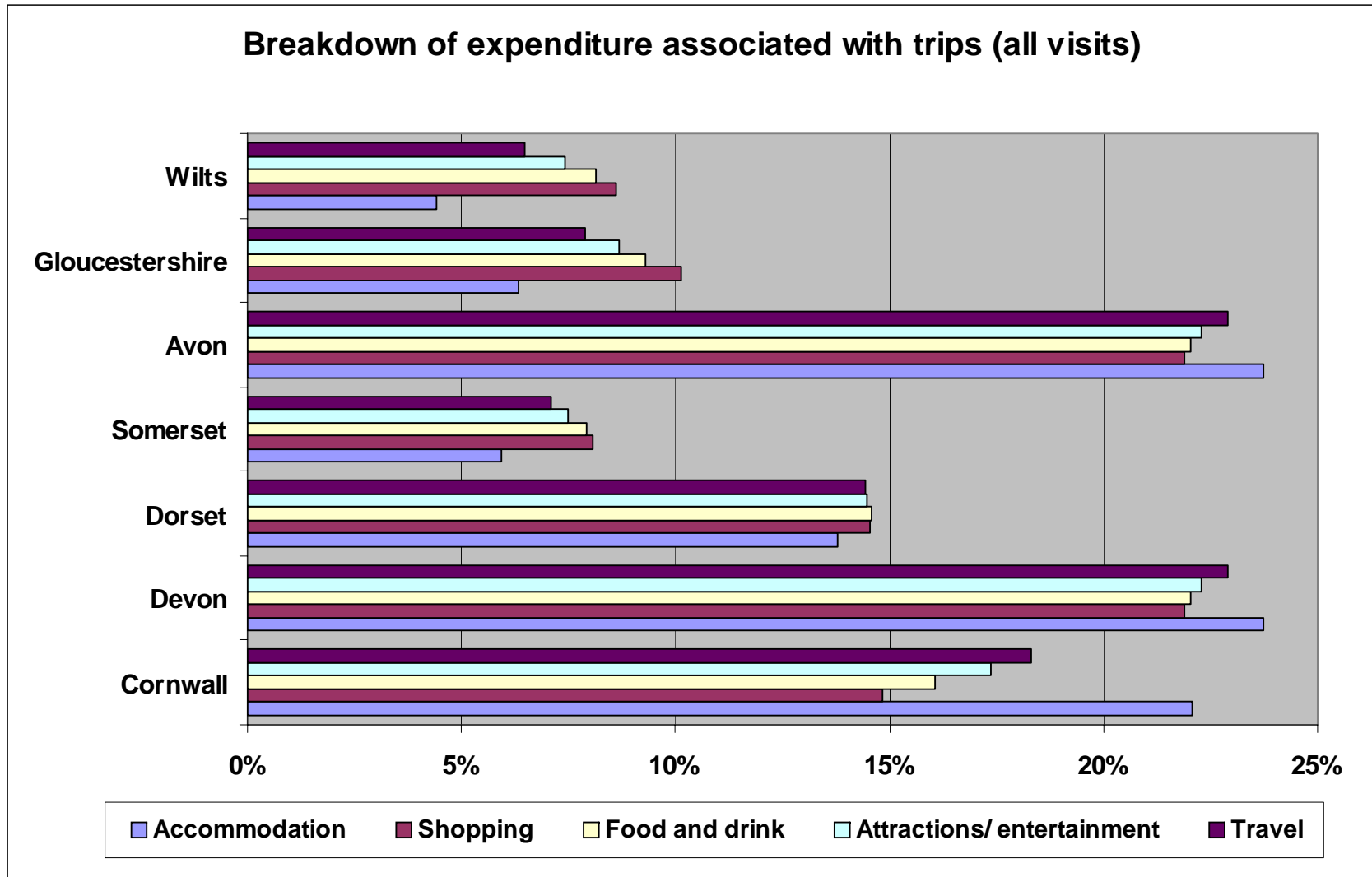
Gloucestershire: Day visits in detail

KEY FACTS:

- Gloucestershire accounts for 13% (12 million) of day trips and 13% of spend (£328.6 million) in the South West region
- 63% of day trips in Gloucestershire are to urban locations and 37% to countryside locations.
- Day trip spend in Gloucestershire is highest amongst those going to urban areas (£207.2 million) with an average spend of £32.36 per urban day visit.



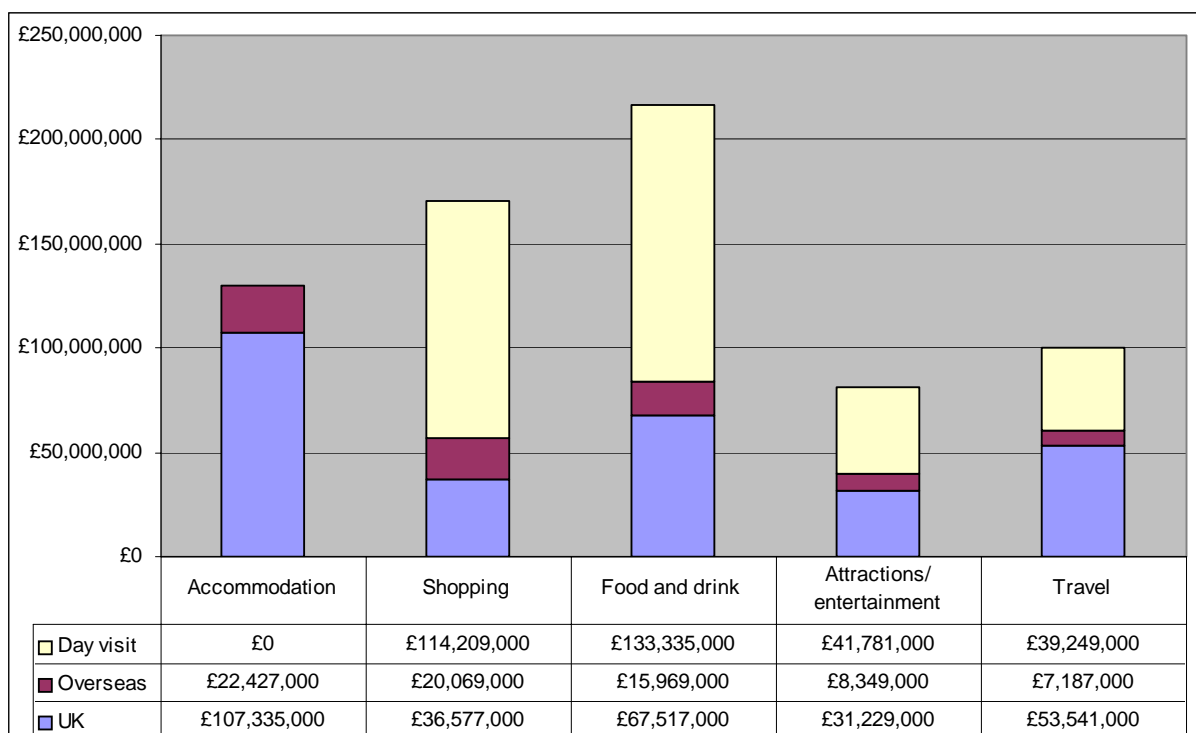
Gloucestershire: Breakdown of expenditure associated with trips in context



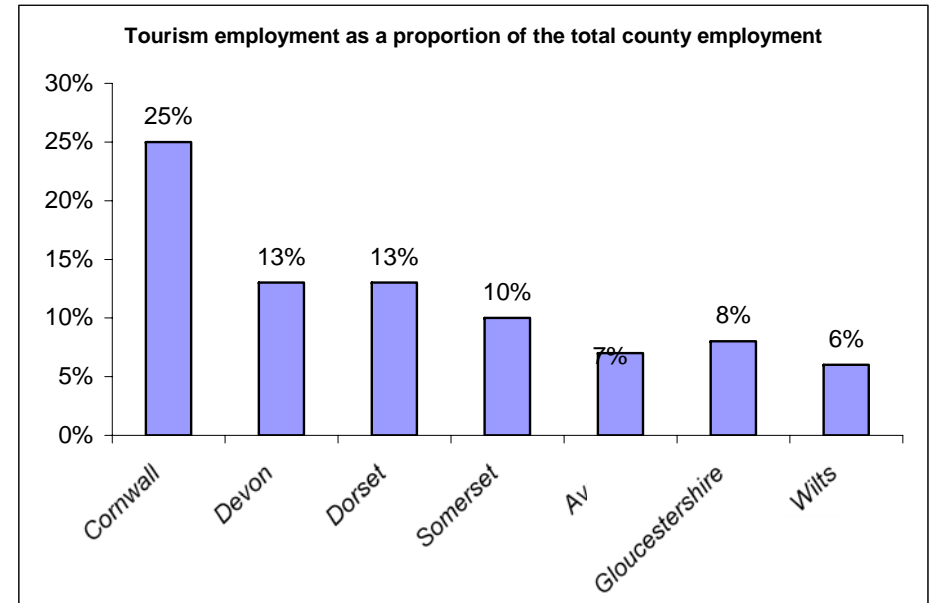
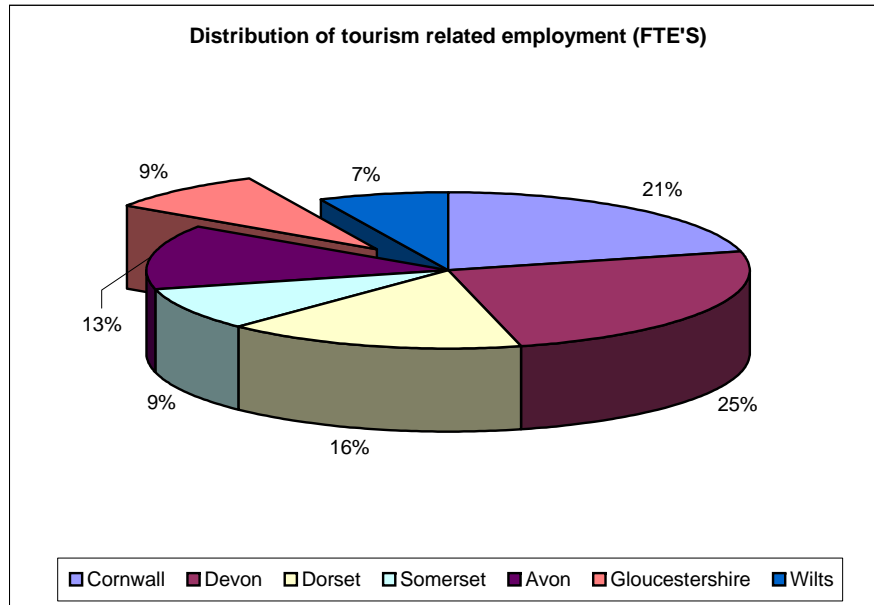
Gloucestershire: Breakdown of expenditure associated with trips in detail

KEY FACTS:

- **The largest proportion of tourism expenditure is spent on food and drink**
- **Domestic and overseas staying visitors spent the largest portion of their expenditure on accommodation (£107.3 million and £22.4 million respectively)**
- **Day visitor spend is highest in the food and drink sector (£133.3 million).**



Gloucestershire: Employment in context



| | Number of FTE's |
|------------------------|-----------------|
| Cornwall | 39,993 |
| Devon | 47,083 |
| Dorset | 30,398 |
| Somerset | 16,822 |
| Avon | 24,792 |
| Gloucestershire | 16,462 |
| Wilts | 12,956 |
| Totals | 188,506 |

Gloucestershire: Employment in detail

KEY FACTS:

- Gloucestershire has 9% of tourism jobs in the region, equating to 16,462 FTEs
- 8% of employment in Gloucestershire is related to tourism
- The largest proportion of jobs directly related to tourism in Gloucestershire is in the catering sector (3,670 FTE's)

Estimated actual number of jobs related to tourism spending

| | Staying tourists | Day visitors | Total |
|---------------|------------------|--------------|---------------|
| Direct | 8,714 | 6,354 | 15,068 |
| Indirect | 2,366 | 1,440 | 3,806 |
| Induced | 1,862 | 1,265 | 3,128 |
| Totals | 12,942 | 9,060 | 22,002 |

Estimated number of full time jobs related to tourism spending (FTE's)

| | Staying tourists | Day visitors | Total |
|---------------|------------------|--------------|---------------|
| Direct | 6,093 | 4,286 | 10,380 |
| Indirect | 2,075 | 1,263 | 3,339 |
| Induced | 1,634 | 1,110 | 2,744 |
| Totals | 9,802 | 6,659 | 16,462 |

Direct employment in businesses in receipt of visitor expenditure - Estimated number of full time jobs(FTE's)

| | Staying | Day | Total |
|-----------------------------|--------------|--------------|---------------|
| Accommodation | 2,397 | 49 | 2,446 |
| Retailing | 574 | 1,158 | 1,732 |
| Catering | 1,413 | 2,257 | 3,670 |
| Attractions/entertainment | 590 | 637 | 1,228 |
| Transport | 287 | 186 | 473 |
| Arising from non trip spend | 831 | 0 | 831 |
| Totals | 6,093 | 4,286 | 10,380 |

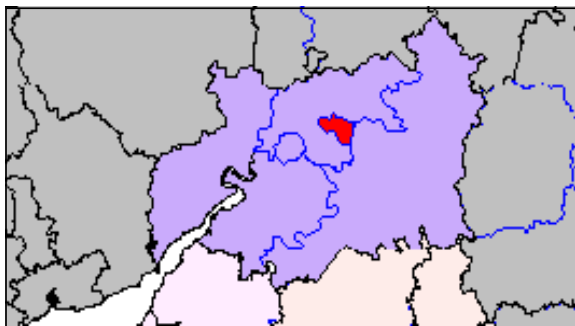
Calculations for the **actual** number of jobs will count both a full time job as one job, and a part time job as one job, regardless of the amount of hours worked. For guidance on direct, indirect and induced jobs please refer to the FAQ's section of this report.

Gloucestershire summary

Key facts for comparison

| | 2001 | 2003 | % difference |
|---|--------------|--------------|---------------------|
| Domestic trips | 1,600,000 | 1,700,000 | 6% |
| Domestic nights | 5,100,000 | 5,200,000 | 2% |
| Domestic spend | £216,600,000 | £296,200,000 | 37% |
| Overseas trips | 179,000 | 238,000 | 33% |
| Overseas nights | 1,048,000 | 1,501,000 | 43% |
| Overseas spend | £50,000,000 | £74,000,000 | 48% |
| Other tourism related spend | £44,474,000 | £49,871,000 | 12% |
| Tourism related jobs (Estimated actual) | 22,353 | 22,002 | -2% |
| % of employment supported by tourism | 8% | 8% | 0% |

Cheltenham Briefing 2003



KEY FACTS

341,300 trips by staying visitors
1,180,000 staying visitor nights
£66,258,000 spend by staying visitors
1,427,000 day visits
£45,414,000 spend by day visitors
£9,433,000 other tourism related spend
3,341 jobs related to tourism spending
7% of employment is supported by tourism

Trips, nights and spend by accommodation type (Domestic tourists)

| | Trips | Nights | Spend |
|--|----------------|----------------|--------------------|
| Serviced | 89,700 | 224,000 | £ 21,861,000 |
| Self catering | 11,200 | 57,000 | £ 3,055,000 |
| Touring caravans /tents | 6,300 | 26,000 | £ 709,000 |
| Static vans/holiday centres | 0 | 0 | £ 0 |
| Group/campus | 10,700 | 45,000 | £ 2,138,000 |
| Paying guests in private homes | 0 | 0 | £ 0 |
| Second homes | 4,400 | 24,000 | £ 1,228,000 |
| Boat moorings | 0 | 0 | £ 0 |
| Other | 10,500 | 23,000 | £ 1,600,000 |
| Staying with friends and relatives (VFR) | 152,300 | 429,000 | £ 16,951,000 |
| Total | 285,000 | 828,000 | £47,542,000 |

Trips, nights and spend by accommodation type (Overseas tourists)

| | Trips | Nights | Spend |
|--|---------------|----------------|--------------------|
| Serviced | 31,200 | 111,000 | £ 10,342,000 |
| Self catering | 300 | 7,000 | £ 250,000 |
| Touring caravans /tents | 300 | 2,000 | £ 43,000 |
| Static vans/holiday centres | 0 | 0 | £ 0 |
| Group/campus | 3,600 | 34,000 | £ 2,035,000 |
| Paying guests in private homes | 1,000 | 41,000 | £ 1,243,000 |
| Second homes | 600 | 10,000 | £ 277,000 |
| Boat moorings | 0 | 0 | £ 0 |
| Other | 1,300 | 2,000 | £ 101,000 |
| Staying with friends and relatives (VFR) | 18,000 | 145,000 | £ 4,426,000 |
| Total | 56,300 | 352,000 | £18,716,000 |

Trips, nights and spend by purpose (Domestic Tourists)

| | Trips | Nights | Spend |
|--------------|----------------|----------------|--------------------|
| Holiday | 177,000 | 555,000 | £ 30,130,000 |
| Business | 28,000 | 63,000 | £ 6,658,000 |
| VFR | 75,000 | 174,000 | £ 5,748,000 |
| Other | 4,000 | 36,000 | £ 5,005,000 |
| Study | 0 | 0 | £ 0 |
| Total | 285,000 | 828,000 | £47,542,000 |

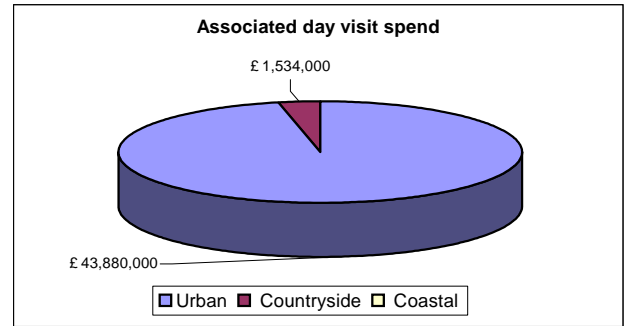
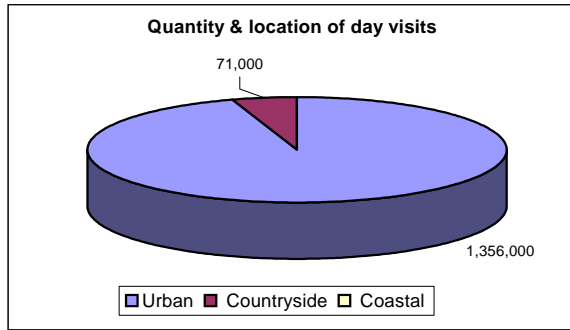
Trips, nights and spend by purpose (Overseas Tourists)

| | Trips | Nights | Spend |
|--------------|---------------|----------------|--------------------|
| Holiday | 19,000 | 63,000 | £ 4,173,000 |
| Business | 13,000 | 40,000 | £ 4,505,000 |
| VFR | 18,000 | 106,000 | £ 4,119,000 |
| Other | 2,000 | 34,000 | £ 667,000 |
| Study | 4,000 | 109,000 | £ 5,252,000 |
| Total | 56,000 | 352,000 | £18,716,000 |

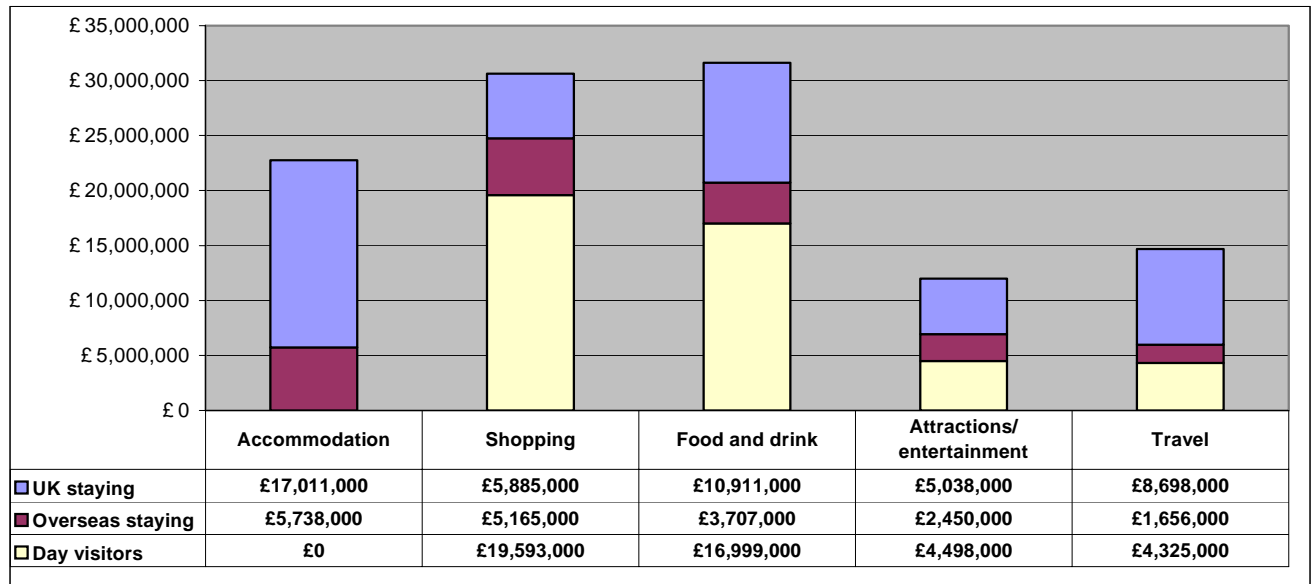
NOTE - Some figures will appear as '0' when there is actual tourism activity connected with the accommodation type or purpose of trip type. This is due to the rounding built in to the Cambridge Model which rounds numbers to the nearest thousand, so if the number is less than 500 this will appear in the report as '0'.

Cheltenham Briefing 2003

Day visits



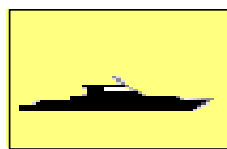
Visitor spend



Other tourism related spend



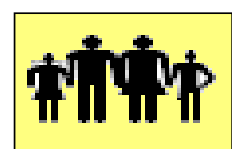
Second Homes
£119,000



Boats
£0



Static Vans
£0



VFR
£9,314,000

Apart from expenditure associated with the individual tourists trips, some forms of tourism related activity also involve expenditure by residents or accommodation owners into the local economy. This is shown above in relation to spend on the maintenance of accommodation in the form of second homes, boats and static vans and the additional spend generated by residents due to the fact that they were entertaining visiting friends and relatives.

Estimated actual number of jobs related to tourism spend

| | Staying tourists | Day visitors | Total |
|---------------|------------------|--------------|--------------|
| Direct jobs | 1,605 | 891 | 2,496 |
| Indirect jobs | 374 | 158 | 532 |
| Induced jobs | 207 | 105 | 312 |
| Total | 2,186 | 1,154 | 3,341 |

Estimated number of full time jobs (FTE's) that the actual jobs total equates to: 2,464

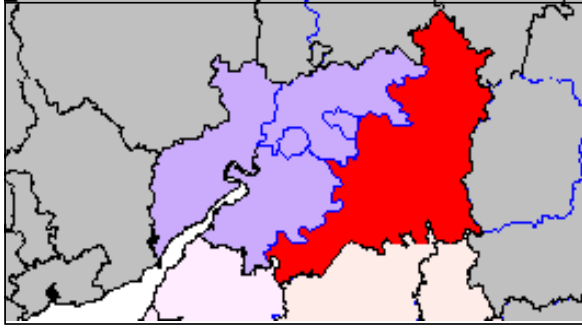
Calculations for the **actual** number of jobs will count both a full time job as one job, and a part time job as one job, regardless of the amount of hours worked. For guidance on direct, indirect and induced jobs please refer to the FAQ's section of this report.

Cheltenham Briefing 2003

Key facts for comparison

| | 2001 | 2003 | % difference |
|---|-------------|-------------|--------------|
| Domestic trips | 265,000 | 285,000 | 8% |
| Domestic nights | 796,000 | 828,000 | 4% |
| Domestic spend | £35,763,000 | £47,542,000 | 33% |
| Overseas trips | 38,000 | 56,300 | 48% |
| Overseas nights | 209,000 | 352,000 | 68% |
| Overseas spend | £10,651,000 | £18,716,000 | 76% |
| Other tourism related spend | £8,216,000 | £9,433,000 | 15% |
| Tourism related jobs (Estimated actual) | 3,835 | 3,341 | -13% |
| % of employment supported by tourism | 8% | 7% | -1% |

Cotswold Briefing 2003



KEY FACTS

468,300 trips by staying visitors
1,686,000 staying visitor nights
£102,573,000 spend by staying visitors
4,099,000 day visits
£102,608,000 spend by day visitors
£7,501,000 other tourism related spend
5,246 jobs related to tourism spending
14% of employment is supported by tourism

Trips, nights and spend by accommodation type (Domestic tourists)

| | Trips | Nights | Spend |
|--|----------------|------------------|--------------------|
| Serviced | 165,200 | 413,000 | £ 40,272,000 |
| Self catering | 69,500 | 354,000 | £ 18,961,000 |
| Touring caravans /tents | 29,300 | 119,000 | £ 3,307,000 |
| Static vans/holiday centres | 2,100 | 7,000 | £ 401,000 |
| Group/campus | 1,300 | 5,000 | £ 260,000 |
| Paying guests in private homes | 0 | 0 | £ 0 |
| Second homes | 18,300 | 99,000 | £ 5,106,000 |
| Boat moorings | 400 | 1,000 | £ 34,000 |
| Other | 7,600 | 17,000 | £ 1,169,000 |
| Staying with friends and relatives (VFR) | 111,300 | 313,000 | £ 12,385,000 |
| Total | 405,100 | 1,329,000 | £81,895,000 |

Trips, nights and spend by accommodation type (Overseas tourists)

| | Trips | Nights | Spend |
|--|---------------|----------------|--------------------|
| Serviced | 42,900 | 153,000 | £ 14,207,000 |
| Self catering | 1,900 | 44,000 | £ 1,550,000 |
| Touring caravans /tents | 1,300 | 9,000 | £ 199,000 |
| Static vans/holiday centres | 0 | 1,000 | £ 17,000 |
| Group/campus | 400 | 4,000 | £ 247,000 |
| Paying guests in private homes | 0 | 0 | £ 0 |
| Second homes | 2,500 | 40,000 | £ 1,150,000 |
| Boat moorings | 0 | 0 | £ 0 |
| Other | 900 | 1,000 | £ 73,000 |
| Staying with friends and relatives (VFR) | 13,200 | 106,000 | £ 3,234,000 |
| Total | 63,200 | 357,000 | £20,678,000 |

Trips, nights and spend by purpose (Domestic Tourists)

| | Trips | Nights | Spend |
|--------------|----------------|------------------|--------------------|
| Holiday | 294,000 | 1,028,000 | £ 51,902,000 |
| Business | 52,000 | 130,000 | £ 11,470,000 |
| VFR | 55,000 | 141,000 | £ 9,902,000 |
| Other | 3,000 | 29,000 | £ 8,622,000 |
| Study | 0 | 0 | £ 0 |
| Total | 405,000 | 1,329,000 | £81,895,000 |

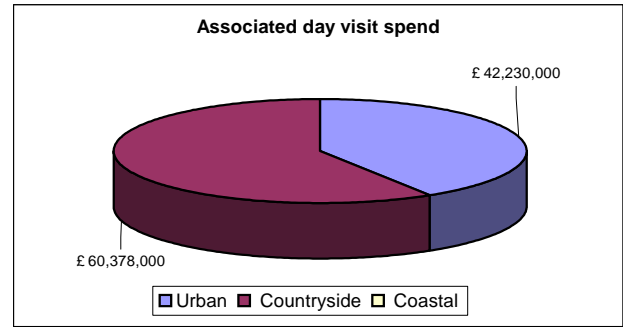
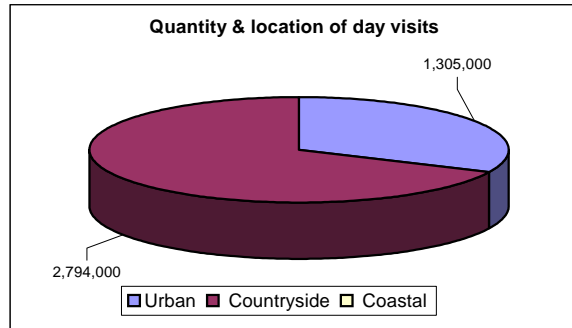
Trips, nights and spend by purpose (Overseas Tourists)

| | Trips | Nights | Spend |
|--------------|---------------|----------------|--------------------|
| Holiday | 31,000 | 140,000 | £ 8,481,000 |
| Business | 17,000 | 76,000 | £ 7,794,000 |
| VFR | 13,000 | 107,000 | £ 3,789,000 |
| Other | 2,000 | 34,000 | £ 614,000 |
| Study | 0 | 0 | £ 0 |
| Total | 63,000 | 357,000 | £20,678,000 |

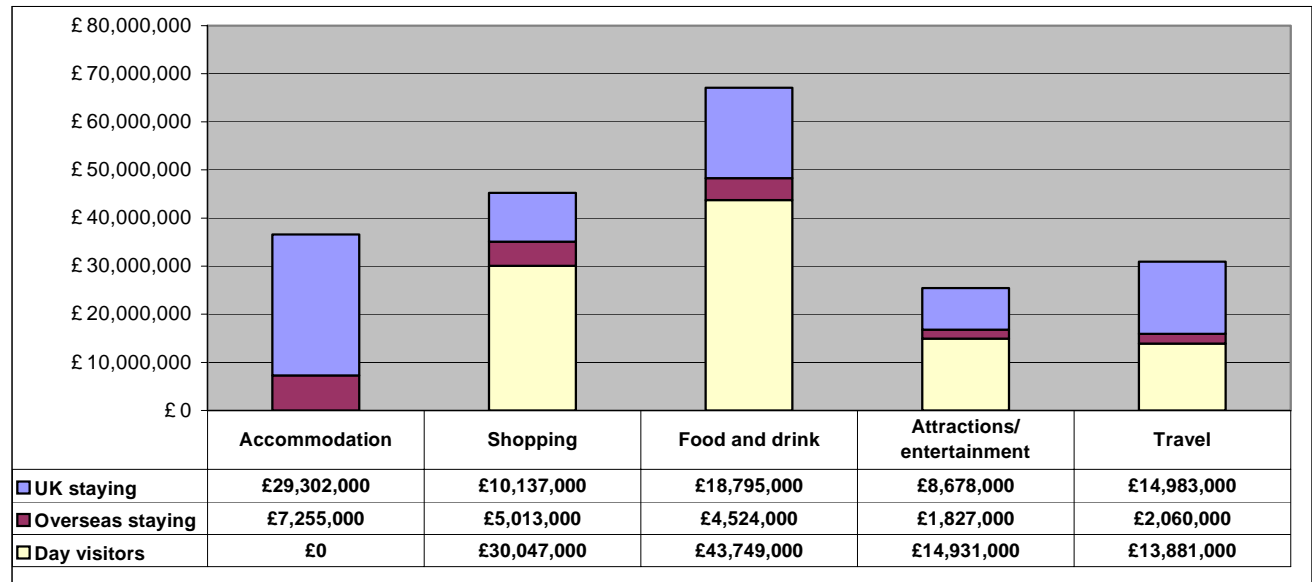
NOTE - Some figures will appear as '0' when there is actual tourism activity connected with the accommodation type or purpose of trip type. This is due to the rounding built in to the Cambridge Model which rounds numbers to the nearest thousand, so if the number is less than 500 this will appear in the report as '0'.

Cotswold Briefing 2003

Day visits



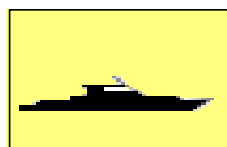
Visitor spend



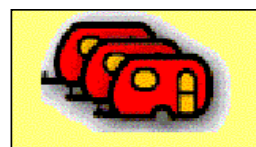
Other tourism related spend



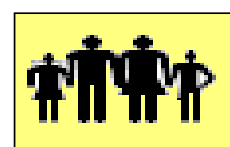
Second Homes
£496,000



Boats
£200,000



Static Vans
£0



VFR
£6,805,000

Apart from expenditure associated with the individual tourists trips, some forms of tourism related activity also involve expenditure by residents or accommodation owners into the local economy. This is shown above in relation to spend on the maintenance of accommodation in the form of second homes, boats and static vans and the additional spend generated by residents due to the fact that they were entertaining visiting friends and relatives.

Estimated actual number of jobs related to tourism spend

| | Staying tourists | Day visitors | Total |
|--|------------------|--------------|--------------|
| Direct jobs | 2,321 | 2,078 | 4,399 |
| Indirect jobs | 386 | 258 | 644 |
| Induced jobs | 111 | 93 | 203 |
| Total | 2,817 | 2,429 | 5,246 |
| Estimated number of full time jobs (FTE's) that the actual jobs total equates to: | | | 3,747 |

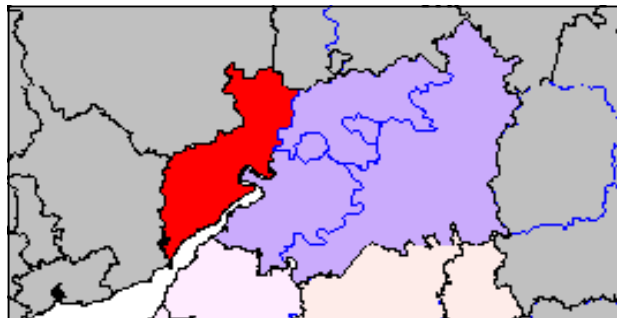
Calculations for the **actual** number of jobs will count both a full time job as one job, and a part time job as one job, regardless of the amount of hours worked. For guidance on direct, indirect and induced jobs please refer to the FAQ's section of this report.

Cotswold Briefing 2003

Key facts for comparison

| | 2001 | 2003 | % difference |
|--|-------------|-------------|--------------|
| Domestic trips | 371,000 | 405,100 | 9% |
| Domestic nights | 1,233,000 | 1,329,000 | 8% |
| Domestic spend | £57,871,000 | £81,895,000 | 42% |
| Overseas | | | |
| Overseas trips | 62,000 | 63,200 | 2% |
| Overseas nights | 354,000 | 357,000 | 1% |
| Overseas spend | £18,049,000 | £20,678,000 | 15% |
| Other tourism related spend | | | |
| Other tourism related spend | £6,870,000 | £7,501,000 | 9% |
| Tourism related jobs (Estimated actual) | | | |
| Tourism related jobs (Estimated actual) | 5,478 | 5,246 | -4% |
| % of employment supported by tourism | | | |
| % of employment supported by tourism | 13% | 14% | 1% |

Forest of Dean Briefing 2003



KEY FACTS

253,600 trips by staying visitors
945,000 staying visitor nights
£42,798,000 spend by staying visitors
1,654,000 day visits
£42,558,000 spend by day visitors
£6,909,000 other tourism related spend
2,344 jobs related to tourism spending
6% of employment is supported by tourism

Trips, nights and spend by accommodation type (Domestic tourists)

| | Trips | Nights | Spend |
|--|----------------|----------------|--------------------|
| Serviced | 31,600 | 79,000 | £ 7,695,000 |
| Self catering | 25,700 | 131,000 | £ 7,005,000 |
| Touring caravans /tents | 42,900 | 174,000 | £ 4,838,000 |
| Static vans/holiday centres | 500 | 2,000 | £ 88,000 |
| Group/campus | 5,100 | 21,000 | £ 1,017,000 |
| Paying guests in private homes | 0 | 0 | £ 0 |
| Second homes | 5,100 | 27,000 | £ 1,421,000 |
| Boat moorings | 0 | 0 | £ 0 |
| Other | 7,600 | 17,000 | £ 1,163,000 |
| Staying with friends and relatives (VFR) | 110,700 | 312,000 | £ 12,324,000 |
| Total | 229,100 | 763,000 | £35,551,000 |

Trips, nights and spend by accommodation type (Overseas tourists)

| | Trips | Nights | Spend |
|--|---------------|----------------|-------------------|
| Serviced | 5,400 | 19,000 | £ 1,801,000 |
| Self catering | 700 | 16,000 | £ 573,000 |
| Touring caravans /tents | 1,900 | 13,000 | £ 291,000 |
| Static vans/holiday centres | 0 | 0 | £ 4,000 |
| Group/campus | 1,700 | 16,000 | £ 968,000 |
| Paying guests in private homes | 0 | 0 | £ 0 |
| Second homes | 700 | 11,000 | £ 320,000 |
| Boat moorings | 0 | 0 | £ 0 |
| Other | 900 | 1,000 | £ 73,000 |
| Staying with friends and relatives (VFR) | 13,100 | 105,000 | £ 3,218,000 |
| Total | 24,500 | 182,000 | £7,247,000 |

Trips, nights and spend by purpose (Domestic Tourists)

| | Trips | Nights | Spend |
|--------------|----------------|----------------|--------------------|
| Holiday | 161,000 | 567,000 | £ 22,531,000 |
| Business | 10,000 | 25,000 | £ 4,979,000 |
| VFR | 55,000 | 142,000 | £ 4,298,000 |
| Other | 3,000 | 29,000 | £ 3,743,000 |
| Study | 0 | 0 | £ 0 |
| Total | 229,000 | 763,000 | £35,551,000 |

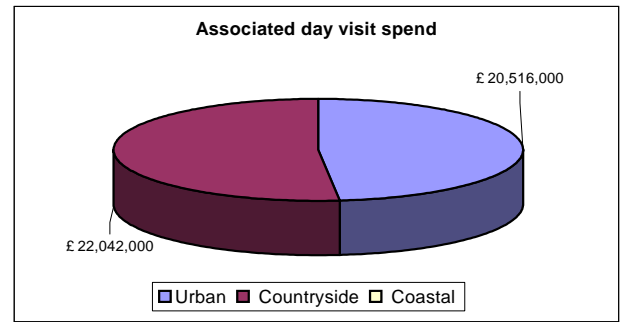
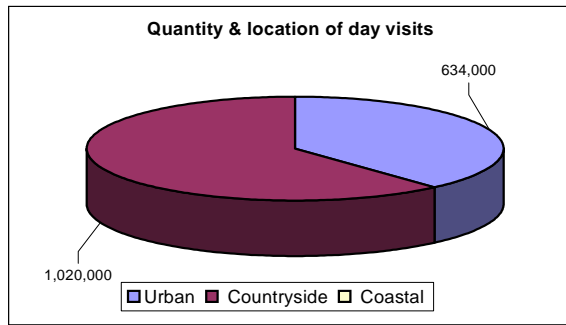
NOTE - Some figures will appear as '0' when there is actual tourism activity connected with the accommodation type or purpose of trip type. This is due to the rounding built in to the Cambridge Model which rounds numbers to the nearest thousand, so if the number is less than 500 this will appear in the report as '0'.

Trips, nights and spend by purpose (Overseas Tourists)

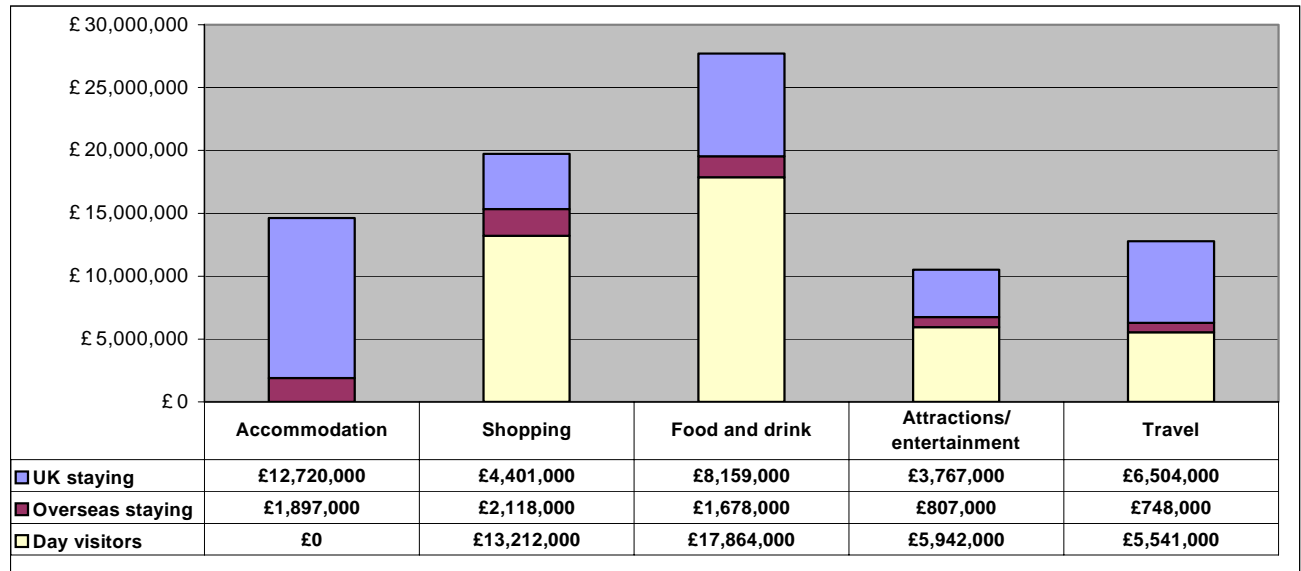
| | Trips | Nights | Spend |
|--------------|---------------|----------------|-------------------|
| Holiday | 8,000 | 34,000 | £ 2,026,000 |
| Business | 2,000 | 9,000 | £ 961,000 |
| VFR | 13,000 | 105,000 | £ 3,667,000 |
| Other | 2,000 | 34,000 | £ 594,000 |
| Study | 0 | 0 | £ 0 |
| Total | 24,000 | 182,000 | £7,247,000 |

Forest of Dean Briefing 2003

Day visits



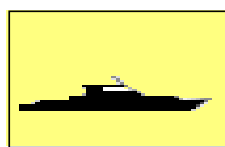
Visitor spend



Other tourism related spend



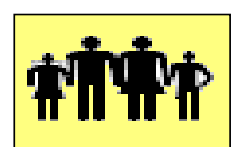
Second Homes
£138,000



Boats
£0



Static Vans
£0



VFR
£6,771,000

Apart from expenditure associated with the individual tourists trips, some forms of tourism related activity also involve expenditure by residents or accommodation owners into the local economy. This is shown above in relation to spend on the maintenance of accommodation in the form of second homes, boats and static vans and the additional spend generated by residents due to the fact that they were entertaining visiting friends and relatives.

Estimated actual number of jobs related to tourism spend

| | Staying tourists | Day visitors | Total |
|--|------------------|--------------|--------------|
| Direct jobs | 1,092 | 882 | 1,974 |
| Indirect jobs | 173 | 106 | 279 |
| Induced jobs | 52 | 39 | 92 |
| Total | 1,318 | 1,026 | 2,344 |
| Estimated number of full time jobs (FTE's) that the actual jobs total equates to: | | | 1,687 |

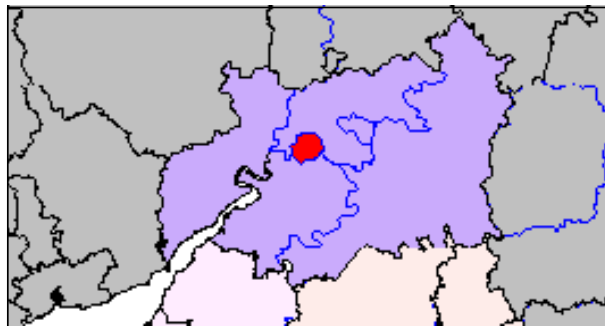
Calculations for the **actual** number of jobs will count both a full time job as one job, and a part time job as one job, regardless of the amount of hours worked. For guidance on direct, indirect and induced jobs please refer to the FAQ's section of this report.

Forest of Dean Briefing 2003

Key facts for comparison

| | 2001 | 2003 | % difference |
|--|-------------|-------------|--------------|
| Domestic trips | 233,000 | 229,100 | -2% |
| Domestic nights | 870,000 | 763,000 | -12% |
| Domestic spend | £25,632,000 | £35,551,000 | 39% |
| Overseas | | | |
| Overseas trips | 19,000 | 24,500 | 29% |
| Overseas nights | 135,000 | 182,000 | 35% |
| Overseas spend | £5,202,000 | £7,247,000 | 39% |
| Other tourism related spend | | | |
| Other tourism related spend | £6,108,000 | £6,909,000 | 13% |
| Tourism related jobs (Estimated actual) | | | |
| Tourism related jobs (Estimated actual) | 2,145 | 2,344 | 9% |
| % of employment supported by tourism | | | |
| % of employment supported by tourism | 6% | 6% | 0% |

Gloucester Briefing 2003



KEY FACTS

294,100 trips by staying visitors
 939,000 staying visitor nights
 £52,474,000 spend by staying visitors
 1,410,000 day visits
 £45,025,000 spend by day visitors
 £9,472,000 other tourism related spend
 3,128 jobs related to tourism spending
 6% of employment is supported by
 tourism

Trips, nights and spend by accommodation type (Domestic tourists)

| | Trips | Nights | Spend |
|--|----------------|----------------|--------------------|
| Serviced | 82,500 | 206,000 | £ 20,103,000 |
| Self catering | 5,200 | 27,000 | £ 1,422,000 |
| Touring caravans /tents | 0 | 0 | £ 0 |
| Static vans/holiday centres | 0 | 0 | £ 0 |
| Group/campus | 3,800 | 16,000 | £ 764,000 |
| Paying guests in private homes | 0 | 0 | £ 0 |
| Second homes | 2,200 | 12,000 | £ 626,000 |
| Boat moorings | 200 | 0 | £ 18,000 |
| Other | 10,500 | 23,000 | £ 1,598,000 |
| Staying with friends and relatives (VFR) | 152,100 | 428,000 | £ 16,932,000 |
| Total | 256,500 | 713,000 | £41,462,000 |

Trips, nights and spend by accommodation type (Overseas tourists)

| | Trips | Nights | Spend |
|--|---------------|----------------|--------------------|
| Serviced | 16,600 | 59,000 | £ 5,506,000 |
| Self catering | 100 | 3,000 | £ 116,000 |
| Touring caravans /tents | 0 | 0 | £ 0 |
| Static vans/holiday centres | 0 | 0 | £ 0 |
| Group/campus | 1,300 | 12,000 | £ 727,000 |
| Paying guests in private homes | 0 | 0 | £ 0 |
| Second homes | 300 | 5,000 | £ 141,000 |
| Boat moorings | 0 | 0 | £ 0 |
| Other | 1,300 | 2,000 | £ 100,000 |
| Staying with friends and relatives (VFR) | 18,000 | 145,000 | £ 4,421,000 |
| Total | 37,600 | 226,000 | £11,012,000 |

Trips, nights and spend by purpose (Domestic Tourists)

| | Trips | Nights | Spend |
|--------------|----------------|----------------|--------------------|
| Holiday | 151,000 | 455,000 | £ 26,277,000 |
| Business | 26,000 | 56,000 | £ 5,807,000 |
| VFR | 75,000 | 167,000 | £ 5,013,000 |
| Other | 4,000 | 34,000 | £ 4,365,000 |
| Study | 0 | 0 | £ 0 |
| Total | 257,000 | 713,000 | £41,462,000 |

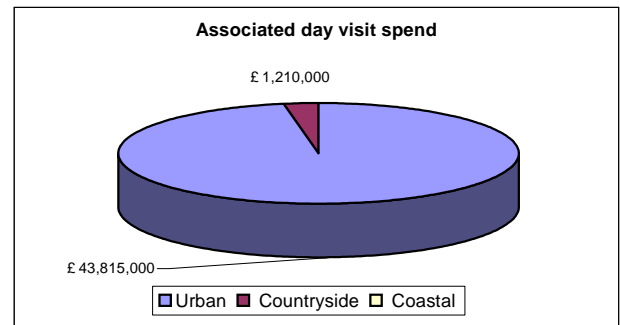
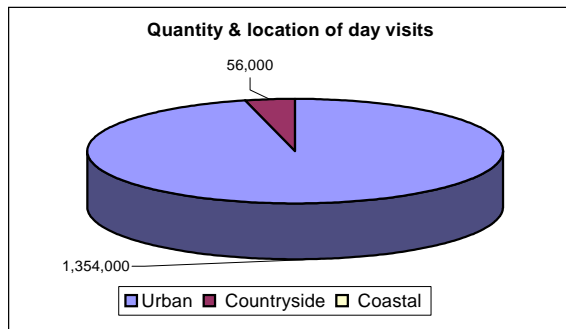
Trips, nights and spend by purpose (Overseas Tourists)

| | Trips | Nights | Spend |
|--------------|---------------|----------------|--------------------|
| Holiday | 11,000 | 41,000 | £ 2,710,000 |
| Business | 7,000 | 24,000 | £ 2,774,000 |
| VFR | 18,000 | 122,000 | £ 4,757,000 |
| Other | 2,000 | 39,000 | £ 770,000 |
| Study | 0 | 0 | £ 0 |
| Total | 38,000 | 226,000 | £11,012,000 |

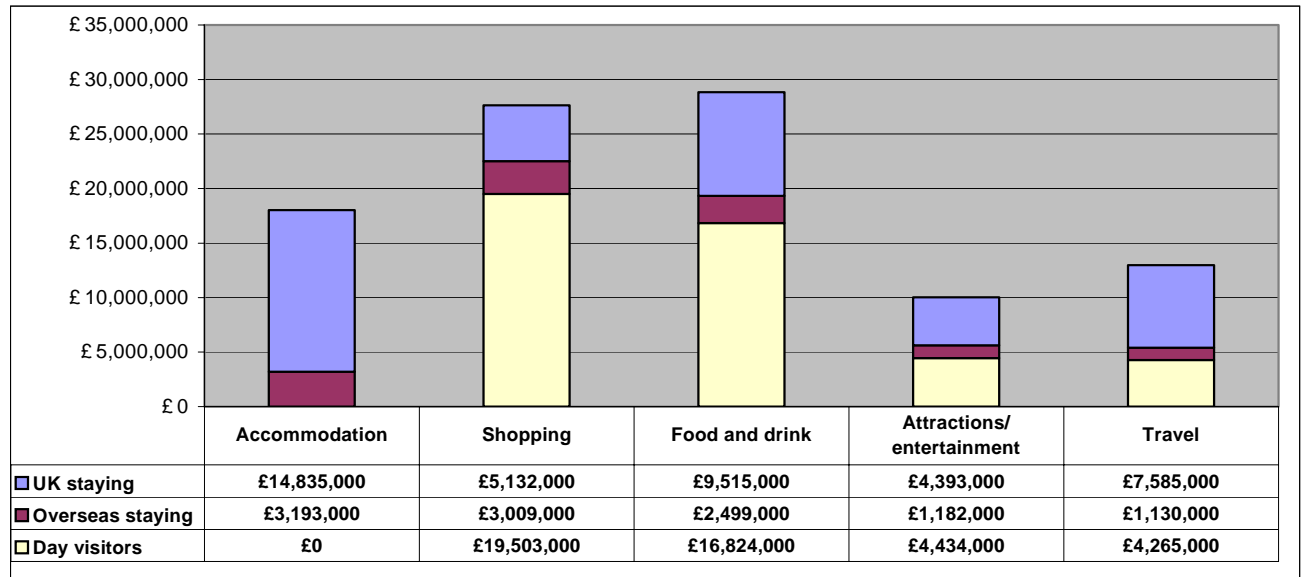
NOTE - Some figures will appear as '0' when there is actual tourism activity connected with the accommodation type or purpose of trip type. This is due to the rounding built in to the Cambridge Model which rounds numbers to the nearest thousand, so if the number is less than 500 this will appear in the report as '0'.

Gloucester Briefing 2003

Day visits



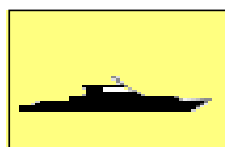
Visitor spend



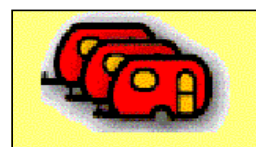
Other tourism related spend



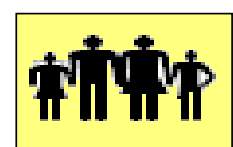
Second Homes
£61,000



Boats
£108,000



Static Vans
£0



VFR
£9,303,000

Apart from expenditure associated with the individual tourists trips, some forms of tourism related activity also involve expenditure by residents or accommodation owners into the local economy. This is shown above in relation to spend on the maintenance of accommodation in the form of second homes, boats and static vans and the additional spend generated by residents due to the fact that they were entertaining visiting friends and relatives.

Estimated actual number of jobs related to tourism spend

| | Staying tourists | Day visitors | Total |
|--|------------------|--------------|--------------|
| Direct jobs | 1,406 | 970 | 2,376 |
| Indirect jobs | 304 | 157 | 460 |
| Induced jobs | 179 | 113 | 291 |
| Total | 1,888 | 1,240 | 3,128 |
| Estimated number of full time jobs (FTE's) that the actual jobs total equates to: | | | 2,301 |

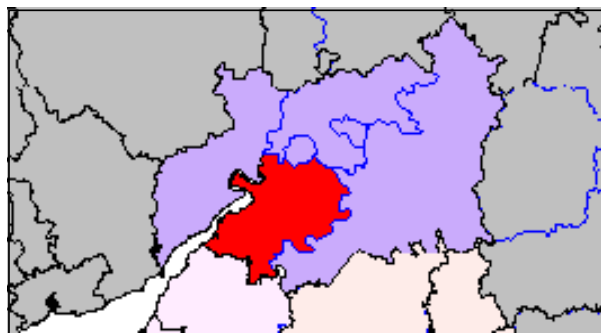
Calculations for the **actual** number of jobs will count both a full time job as one job, and a part time job as one job, regardless of the amount of hours worked. For guidance on direct, indirect and induced jobs please refer to the FAQ's section of this report.

Gloucester Briefing 2003

Key facts for comparison

| | 2001 | 2003 | % difference |
|---|-------------|-------------|--------------|
| Domestic trips | 240,000 | 256,500 | 7% |
| Domestic nights | 685,000 | 713,000 | 4% |
| Domestic spend | £30,956,000 | £41,462,000 | 34% |
| Overseas trips | 22,000 | 37,600 | 71% |
| Overseas nights | 114,000 | 226,000 | 98% |
| Overseas spend | £5,648,000 | £11,012,000 | 95% |
| Other tourism related spend | £8,258,000 | £9,472,000 | 15% |
| Tourism related jobs (Estimated actual) | 3,742 | 3,128 | -16% |
| % of employment supported by tourism | 7% | 6% | -1% |

Stroud Briefing 2003



KEY FACTS

327,000 trips by staying visitors
1,094,000 staying visitor nights
£60,428,000 spend by staying visitors
2,064,000 day visits
£56,418,000 spend by day visitors
£9,306,000 other tourism related spend
3,334 jobs related to tourism spending
7% of employment is supported by tourism

Trips, nights and spend by accommodation type (Domestic tourists)

| | Trips | Nights | Spend |
|--|----------------|----------------|--------------------|
| Serviced | 97,000 | 243,000 | £ 23,653,000 |
| Self catering | 25,100 | 128,000 | £ 6,847,000 |
| Touring caravans /tents | 6,400 | 26,000 | £ 727,000 |
| Static vans/holiday centres | 100 | 0 | £ 20,000 |
| Group/campus | 1,100 | 4,000 | £ 212,000 |
| Paying guests in private homes | 0 | 0 | £ 0 |
| Second homes | 6,300 | 34,000 | £ 1,761,000 |
| Boat moorings | 0 | 0 | £ 0 |
| Other | 10,300 | 23,000 | £ 1,569,000 |
| Staying with friends and relatives (VFR) | 149,400 | 421,000 | £ 16,625,000 |
| Total | 295,700 | 879,000 | £51,415,000 |

Trips, nights and spend by accommodation type (Overseas tourists)

| | Trips | Nights | Spend |
|--|---------------|----------------|-------------------|
| Serviced | 10,200 | 36,000 | £ 3,370,000 |
| Self catering | 700 | 16,000 | £ 560,000 |
| Touring caravans /tents | 300 | 2,000 | £ 44,000 |
| Static vans/holiday centres | 0 | 0 | £ 1,000 |
| Group/campus | 400 | 3,000 | £ 202,000 |
| Paying guests in private homes | 0 | 0 | £ 0 |
| Second homes | 900 | 14,000 | £ 397,000 |
| Boat moorings | 0 | 0 | £ 0 |
| Other | 1,200 | 2,000 | £ 99,000 |
| Staying with friends and relatives (VFR) | 17,700 | 142,000 | £ 4,341,000 |
| Total | 31,300 | 215,000 | £9,013,000 |

Trips, nights and spend by purpose (Domestic Tourists)

| | Trips | Nights | Spend |
|--------------|----------------|----------------|--------------------|
| Holiday | 187,000 | 599,000 | £ 32,585,000 |
| Business | 31,000 | 70,000 | £ 7,201,000 |
| VFR | 74,000 | 174,000 | £ 6,216,000 |
| Other | 4,000 | 36,000 | £ 5,413,000 |
| Study | 0 | 0 | £ 0 |
| Total | 296,000 | 879,000 | £51,415,000 |

Trips, nights and spend by purpose (Overseas Tourists)

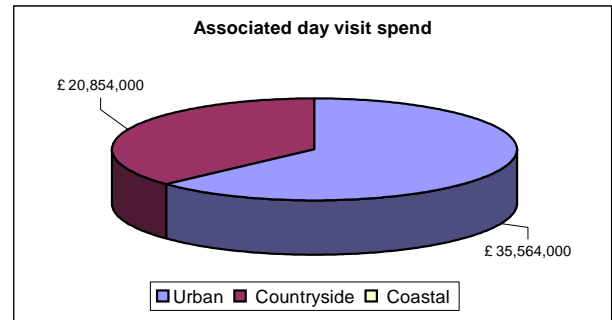
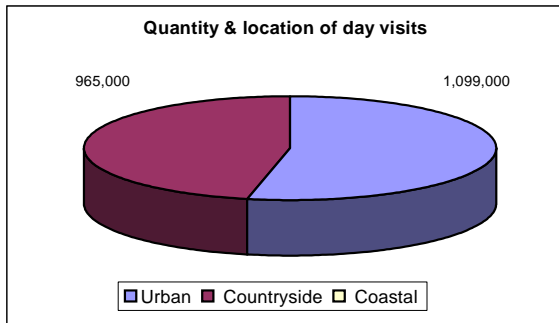
| | Trips | Nights | Spend |
|--------------|---------------|----------------|-------------------|
| Holiday | 8,000 | 30,000 | £ 1,875,000 |
| Business | 4,000 | 16,000 | £ 1,701,000 |
| VFR | 17,000 | 128,000 | £ 4,679,000 |
| Other | 2,000 | 41,000 | £ 758,000 |
| Study | 0 | 0 | £ 0 |
| Total | 31,000 | 215,000 | £9,013,000 |

NOTE - Some figures will appear as '0' when there is actual tourism activity connected with the accommodation type or purpose of trip type.

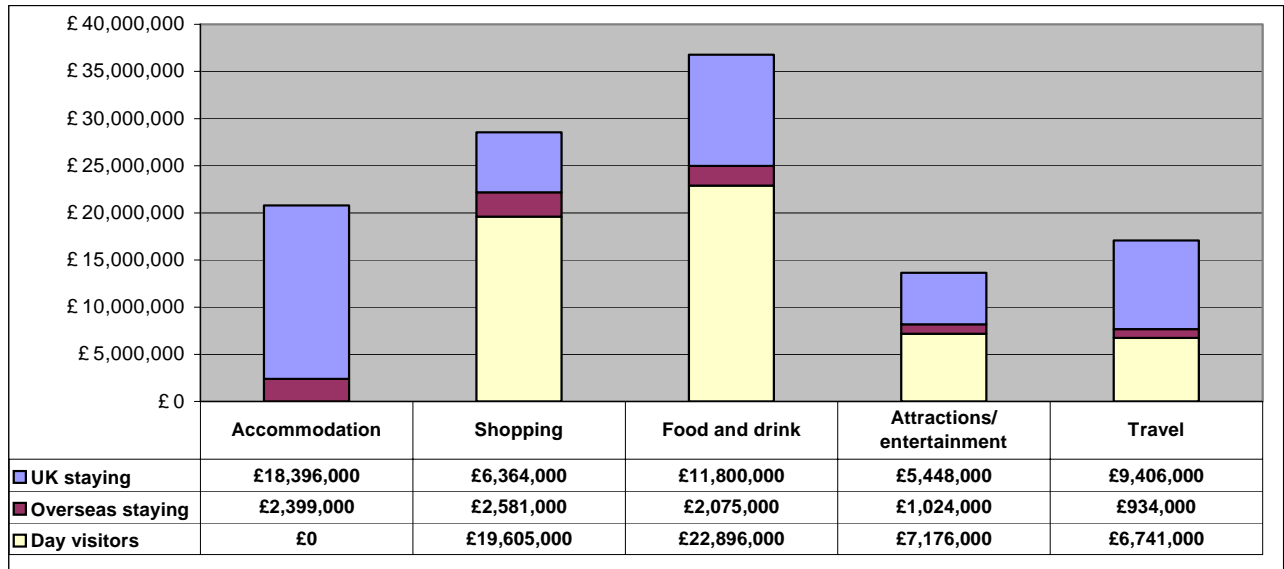
This is due to the rounding built in to the Cambridge Model which rounds numbers to the nearest thousand, so if the number is less than 500 this will appear in the report as '0'.

Stroud Briefing 2003

Day visits



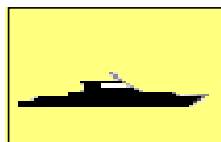
Visitor spend



Other tourism related spend



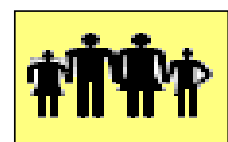
Second Homes
£171,000



Boats
£0



Static Vans
£0



VFR
£9,135,000

Apart from expenditure associated with the individual tourists trips, some forms of tourism related activity also involve expenditure by residents or accommodation owners into the local economy. This is shown above in relation to spend on the maintenance of accommodation in the form of second homes, boats and static vans and the additional spend generated by residents due to the fact that they were entertaining visiting friends and relatives.

Estimated actual number of jobs related to tourism spend

| | Staying tourists | Day visitors | Total |
|--|------------------|--------------|--------------|
| Direct jobs | 1,414 | 1,059 | 2,473 |
| Indirect jobs | 344 | 205 | 549 |
| Induced jobs | 185 | 127 | 312 |
| Total | 1,942 | 1,392 | 3,334 |
| Estimated number of full time jobs (FTE's) that the actual jobs total equates to: | | | 2,464 |

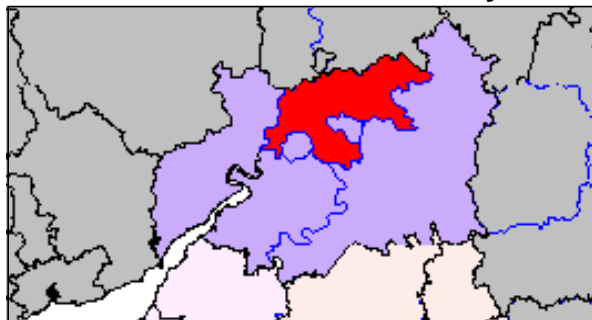
Calculations for the **actual** number of jobs will count both a full time job as one job, and a part time job as one job, regardless of the amount of hours worked. For guidance on direct, indirect and induced jobs please refer to the FAQ's section of this report.

Stroud Briefing 2003

Key facts for comparison

| | 2001 | 2003 | % difference |
|---|-------------|-------------|--------------|
| Domestic trips | 284,000 | 295,700 | 4% |
| Domestic nights | 856,000 | 879,000 | 3% |
| Domestic spend | £38,852,000 | £51,415,000 | 32% |
| Overseas trips | 22,000 | 31,300 | 42% |
| Overseas nights | 141,000 | 215,000 | 52% |
| Overseas spend | £6,090,000 | £9,013,000 | 48% |
| Other tourism related spend | £8,505,000 | £9,306,000 | 9% |
| Tourism related jobs (Estimated actual) | 3,164 | 3,334 | 5% |
| % of employment supported by tourism | 6% | 7% | 1% |

Tewkesbury Briefing 2003



KEY FACTS

253,700 trips by staying visitors
858,000 staying visitor nights
£45,670,000 spend by staying visitors
1,365,000 day visits
£36,549,000 spend by day visitors
£7,251,000 other tourism related spend
2,138 jobs related to tourism spending
6% of employment is supported by tourism

Trips, nights and spend by accommodation type (Domestic tourists)

| | Trips | Nights | Spend |
|--|----------------|----------------|--------------------|
| Serviced | 71,800 | 179,000 | £ 17,495,000 |
| Self catering | 16,000 | 82,000 | £ 4,372,000 |
| Touring caravans /tents | 23,300 | 95,000 | £ 2,626,000 |
| Static vans/holiday centres | 0 | 0 | £ 0 |
| Group/campus | 0 | 0 | £ 0 |
| Paying guests in private homes | 0 | 0 | £ 0 |
| Second homes | 3,000 | 16,000 | £ 842,000 |
| Boat moorings | 1,500 | 2,000 | £ 118,000 |
| Other | 7,300 | 16,000 | £ 1,111,000 |
| Staying with friends and relatives (VFR) | 105,800 | 298,000 | £ 11,773,000 |
| Total | 228,600 | 688,000 | £38,336,000 |

Trips, nights and spend by accommodation type (Overseas tourists)

| | Trips | Nights | Spend |
|--|---------------|----------------|-------------------|
| Serviced | 9,600 | 34,000 | £ 3,174,000 |
| Self catering | 400 | 10,000 | £ 357,000 |
| Touring caravans /tents | 1,000 | 7,000 | £ 158,000 |
| Static vans/holiday centres | 0 | 0 | £ 0 |
| Group/campus | 0 | 0 | £ 0 |
| Paying guests in private homes | 300 | 10,000 | £ 311,000 |
| Second homes | 400 | 7,000 | £ 190,000 |
| Boat moorings | 0 | 0 | £ 0 |
| Other | 900 | 1,000 | £ 70,000 |
| Staying with friends and relatives (VFR) | 12,500 | 100,000 | £ 3,074,000 |
| Total | 25,100 | 170,000 | £7,334,000 |

Trips, nights and spend by purpose (Domestic Tourists)

| | Trips | Nights | Spend |
|--------------|----------------|----------------|--------------------|
| Holiday | 151,000 | 486,000 | £ 24,296,000 |
| Business | 23,000 | 52,000 | £ 5,369,000 |
| VFR | 52,000 | 124,000 | £ 4,635,000 |
| Other | 3,000 | 25,000 | £ 4,036,000 |
| Study | 0 | 0 | £ 0 |
| Total | 229,000 | 688,000 | £38,336,000 |

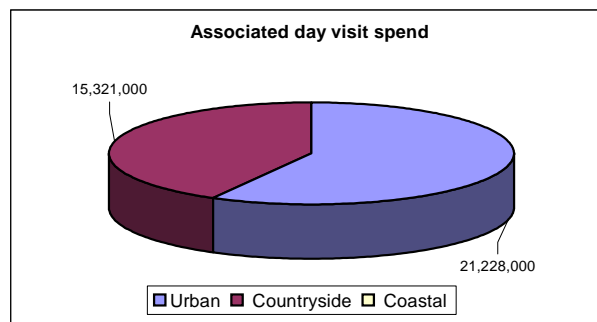
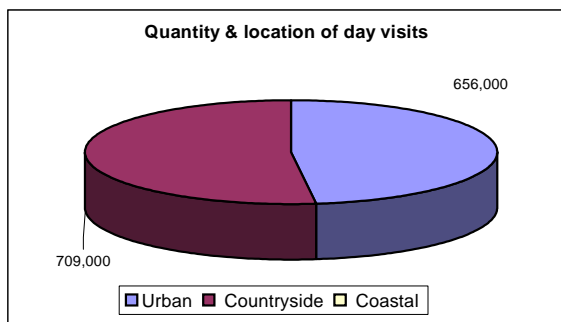
Trips, nights and spend by purpose (Overseas Tourists)

| | Trips | Nights | Spend |
|--------------|---------------|----------------|-------------------|
| Holiday | 7,000 | 30,000 | £ 1,840,000 |
| Business | 4,000 | 16,000 | £ 1,614,000 |
| VFR | 12,000 | 94,000 | £ 3,339,000 |
| Other | 2,000 | 30,000 | £ 541,000 |
| Study | 0 | 0 | £ 0 |
| Total | 25,000 | 170,000 | £7,334,000 |

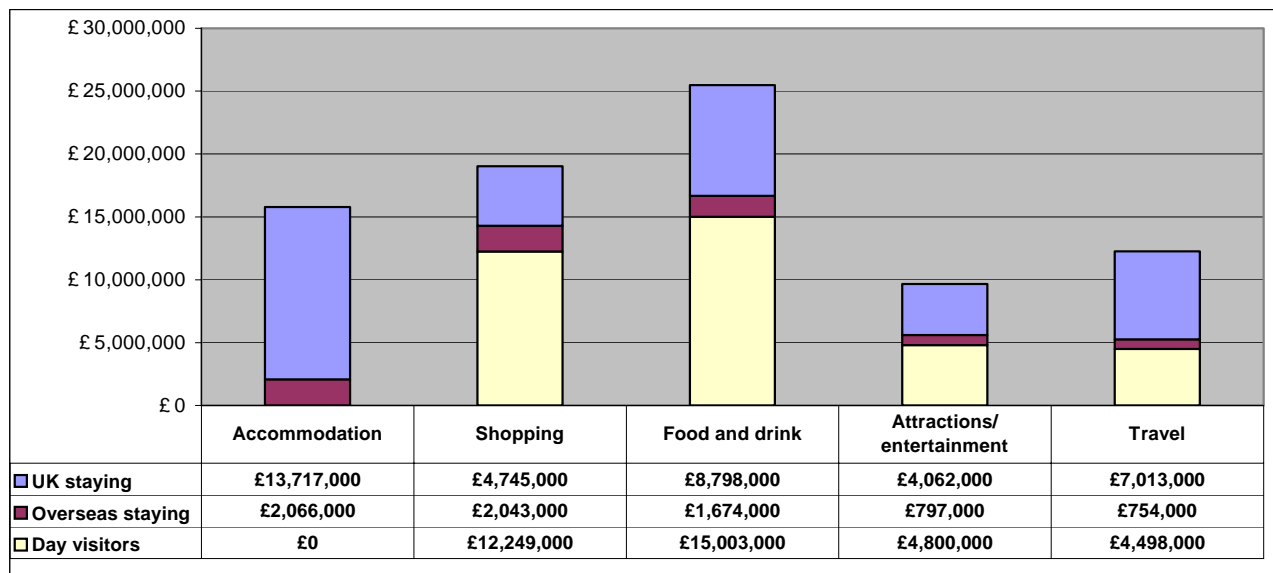
NOTE - Some figures will appear as '0' when there is actual tourism activity connected with the accommodation type or purpose of trip type. This is due to the rounding built in to the Cambridge Model which rounds numbers to the nearest thousand, so if the number is less than 500 this will appear in the report as '0'.

Tewkesbury Briefing 2003

Day visits



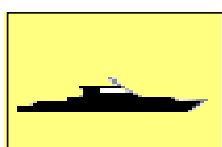
Visitor spend



Other tourism related spend



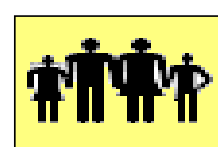
Second Homes
£82,000



Boats
£700,000



Static Vans
£0



VFR
£6,469,000

Apart from expenditure associated with the individual tourists trips, some forms of tourism related activity also involve expenditure by residents or accommodation owners into the local economy. This is shown above in relation to spend on the maintenance of accommodation in the form of second homes, boats and static vans and the additional spend generated by residents due to the fact that they were entertaining visiting friends and relatives.

Estimated actual number of jobs related to tourism spend

| | Staying tourists | Day visitors | Total |
|--|------------------|--------------|--------------|
| Direct jobs | 1,070 | 710 | 1,780 |
| Indirect jobs | 185 | 89 | 274 |
| Induced jobs | 52 | 32 | 84 |
| Total | 1,307 | 831 | 2,138 |
| Estimated number of full time jobs (FTE's) that the actual jobs total equates to: | | | 1,546 |

Calculations for the **actual** number of jobs will count both a full time job as one job, and a part time job as one job, regardless of the amount of hours worked. For guidance on direct, indirect and induced jobs please refer to the FAQ's section of this report.

Tewkesbury Briefing 2003

Key facts for comparison

| | 2001 | 2003 | % difference |
|--|-------------|-------------|---------------------|
| Domestic trips | 208,000 | 228,600 | 10% |
| Domestic nights | 660,000 | 688,000 | 4% |
| Domestic spend | £27,525,000 | £38,336,000 | 39% |
| Overseas | | | |
| Overseas trips | 16,000 | 25,100 | 57% |
| Overseas nights | 95,000 | 170,000 | 79% |
| Overseas spend | £4,360,000 | £7,334,000 | 68% |
| Other tourism related spend | | | |
| Other tourism related spend | £6,516,000 | £7,251,000 | 11% |
| Tourism related jobs (Estimated actual) | | | |
| Tourism related jobs (Estimated actual) | 1,789 | 2,138 | 20% |
| % of employment supported by tourism | | | |
| % of employment supported by tourism | 5% | 6% | 1% |