

The Economic Impact of North Somerset's Visitor Economy 2017

Produced on behalf of North Somerset Council
By
The South West Research Company Ltd



November 2018



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Introduction

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in North Somerset and the Former Avon area in 2017. The Former Avon Area consists of Bath and North East Somerset, Bristol, North Somerset and South Gloucestershire. Whilst the Former Avon figures in this report include all of these areas no individual breakdowns are available for Bath and North East Somerset who chose not to participate in the project this year.

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 2017, including key facts about the economy, weather and key events please see Appendix 2 of this report.

Value of Tourism 2017

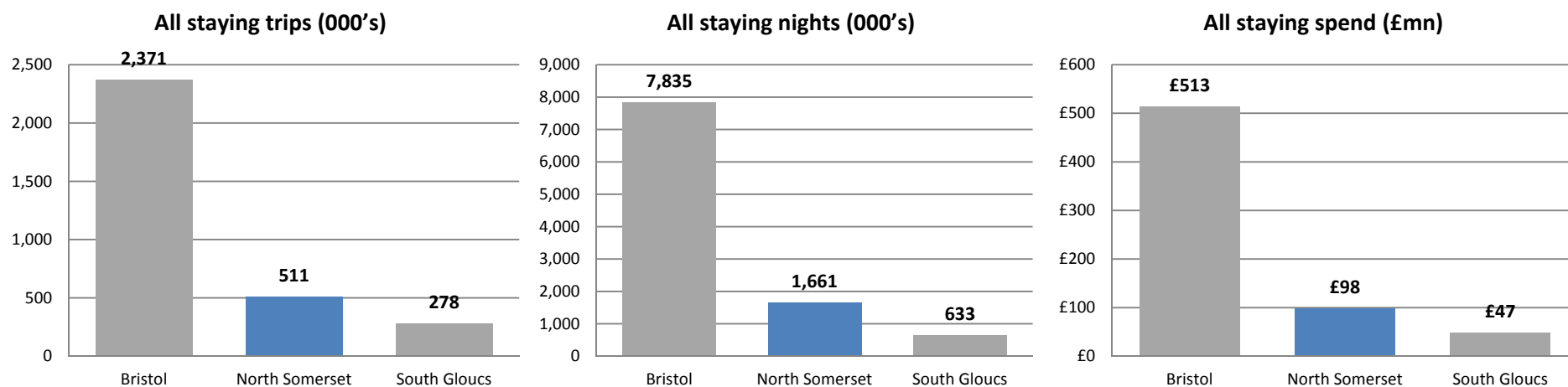
North Somerset

Key Facts	
511,000	Staying visitor trips
1,661,000	Staying visitor nights
£97,652,000	Staying visitor spend
7,779,000	Day visits
£275,361,000	Day visitor spend
£373,013,000	Direct visitor spend
£10,246,000	Other related spend
£383,259,000	TOTAL VISITOR RELATED SPEND
7,479	Estimated actual employment
5,366	FTE employment
7%	Proportion of all employment

North Somerset – Staying visits

Information on staying visits is derived from the Great Britain Tourism Survey (GBTS) for domestic visitors and from the International Passenger Survey (IPS) for Overseas visitors. The methodology of both surveys has been stable since 2006 allowing for direct comparison between years and the analysis of trend data. Data at a county level is derived from the national surveys for trips, nights and spend but adjusted to account for local data and modelled below this level.

North Somerset - Staying visits in the Former Avon area context



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Bristol	1,769	602	3,993	3,842	£302	£211
North Somerset	456	55	1,337	324	£81	£17
South Gloucestershire	260	18	573	60	£44	£4

North Somerset - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	173,800	403,000	£42,790,000
Self catering	39,000	156,000	£11,700,000
Touring caravans /tents	28,300	121,000	£4,126,000
Static vans/holiday centres	22,200	98,000	£4,175,000
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	4,600	21,000	£434,000
Boat moorings	7,500	30,000	£1,584,000
Other	4,700	17,000	£1,031,000
Staying with friends and relatives	175,700	490,000	£14,977,000
Total	456,000	1,337,000	£80,817,000

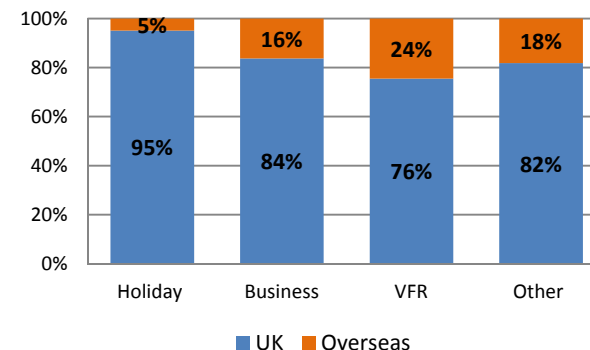
Overseas tourists	Trips	Nights	Spend
Serviced	25,100	84,000	£8,595,000
Self catering	1,300	26,000	£1,015,000
Touring caravans /tents	1,600	7,000	£292,000
Static vans/holiday centres	200	2,000	£67,000
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	500	7,000	£284,000
Boat moorings	0	0	£0
Other	5,300	17,000	£791,000
Staying with friends and relatives	20,500	181,000	£5,793,000
Total	55,000	324,000	£16,835,000

North Somerset - Staying visits by purpose

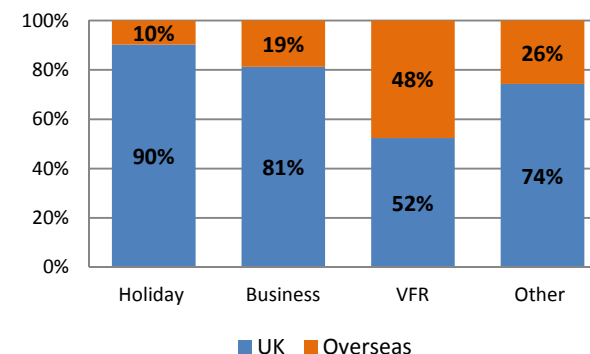
Domestic tourists	Trips	Nights	Spend
Holiday	309,000	976,000	£57,445,000
Business	67,000	139,000	£13,767,000
Visits to friends and relatives	71,000	196,000	£7,408,000
Other	9,000	26,000	£2,196,000
Study	0	0	£0
Total	456,000	1,337,000	£80,817,000

Overseas tourists	Trips	Nights	Spend
Holiday	16,000	105,000	£4,216,000
Business	13,000	32,000	£3,518,000
Visits to friends and relatives	23,000	178,000	£8,160,000
Other	2,000	9,000	£941,000
Study	0	0	£0
Total	55,000	324,000	£16,835,000

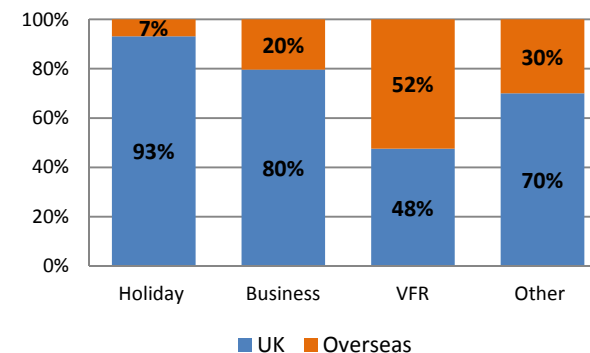
Trips



Nights



Spend



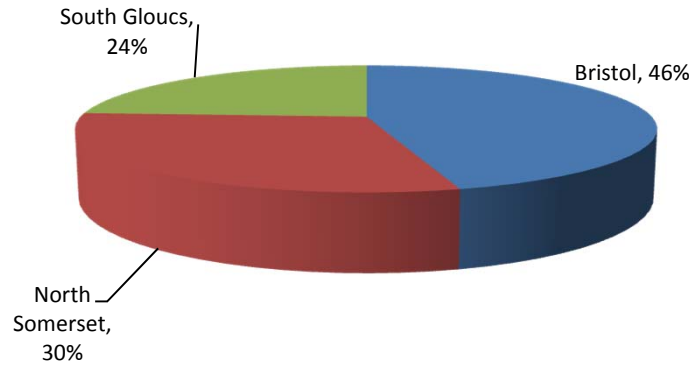
North Somerset – Day visits

Information on day visits within this report has been derived from the 2017 Great Britain Day Visit Survey (GBDVS). The survey, which was first undertaken in 2011, provides a much needed update on day visit activity in Great Britain and generally speaking estimated greater frequencies of trip taking than the previous day visit survey (England Leisure Visits Survey 2005). As a result of the new methodology in 2011 comparisons with previous day visit estimates are not possible.

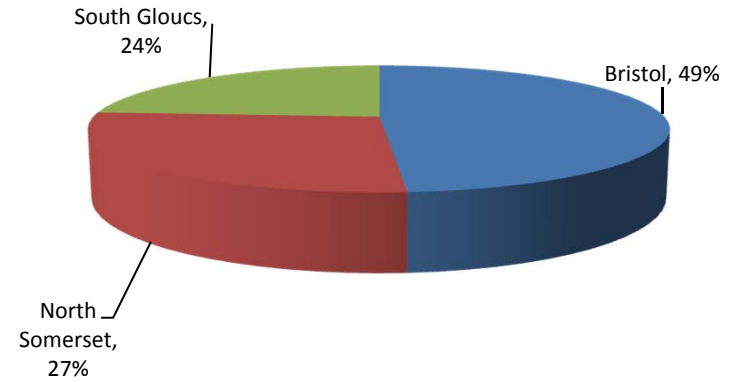
The GBDVS distinguishes between day visits to a town or city; to the seaside and coast; and to the countryside. Different drivers are used within the model to distribute these trips. Local 'drivers' such as attraction footfall, quality and size of countryside and coastline are factored into the model for this purpose.

North Somerset - Day visits in the Former Avon area context

All day visits



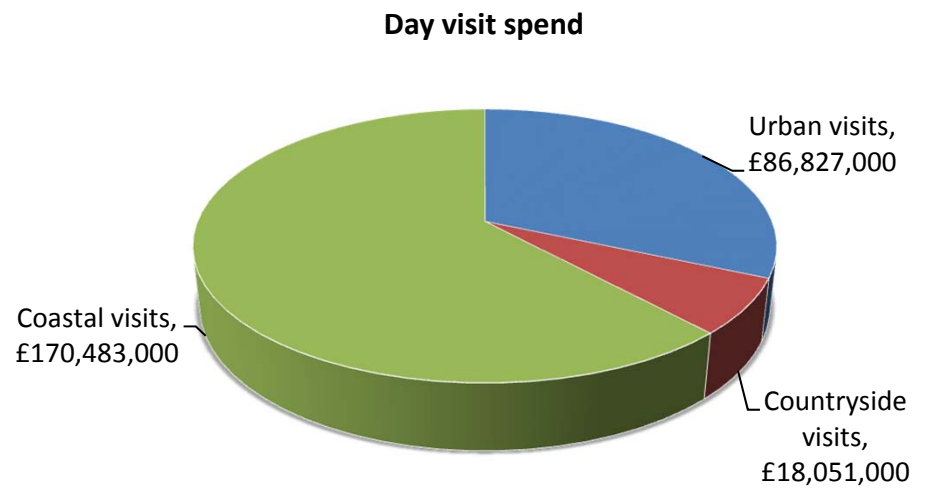
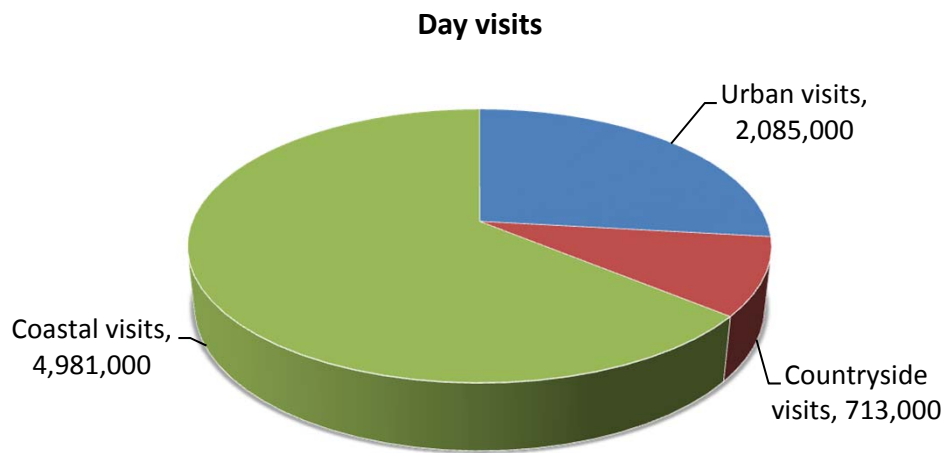
All day visit spend



Area	Day visits	Day visit spend
Bristol	11.8	£489.8
North Somerset	7.8	£275.4
South Gloucestershire	6.2	£239.8

North Somerset - Day visits by location

Total day visits	Total day visit spend
7,779,000	£275,361,000



North Somerset - Direct visitor expenditure by category

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.

North Somerset – Direct visitor expenditure by category



Accommodation

- UK staying visitors £29,688,000
- Overseas staying visitors £4,658,000



Shopping

- UK staying visitors £9,831,000
- Overseas staying visitors £4,723,000
- Day visitors £58,765,000



Food & drink

- UK staying visitors £18,368,000
- Overseas staying visitors £3,890,000
- Day visitors £129,193,000



Attractions/entertainment

- UK staying visitors £8,307,000
- Overseas staying visitors £1,812,000
- Day visitors £29,700,000



Travel

- UK staying visitors £14,623,000
- Overseas staying visitors £1,752,000
- Day visitors £57,703,000

North Somerset – Other visitor related expenditure by category



Second Homes

£281,000



Boats

£500,000



Visiting friends and relatives (non-visitor spend)

£9,465,000

- 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.

North Somerset – Tourism related employment

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).

North Somerset – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)

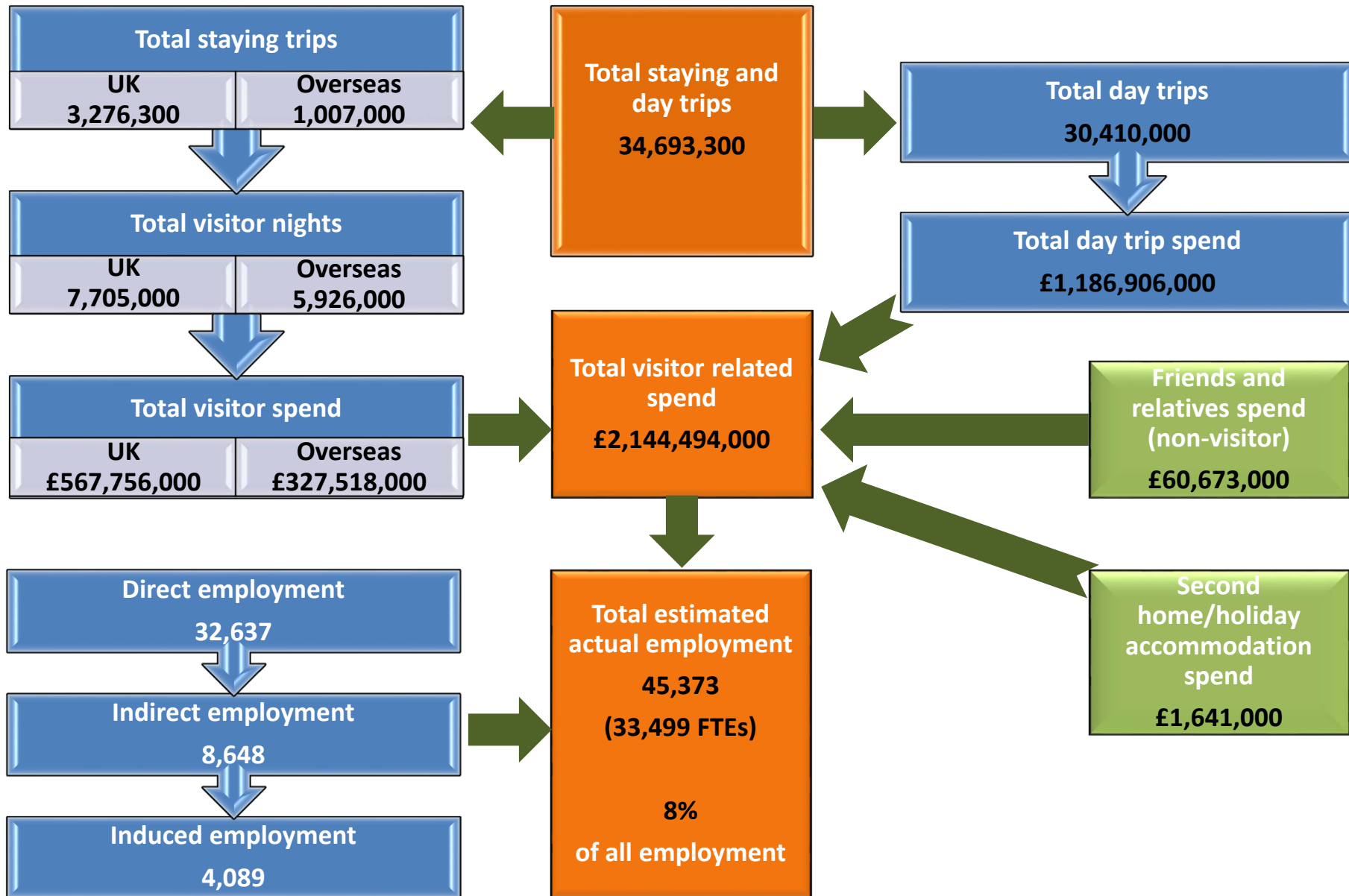


Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	493	37	530
Retailing	117	472	589
Catering	285	1,651	1,936
Attractions/entertainment	183	551	734
Transport	60	213	274
Arising from non trip spend	163	0	163
Total Direct	1,301	2,924	4,225

Former Avon 2017

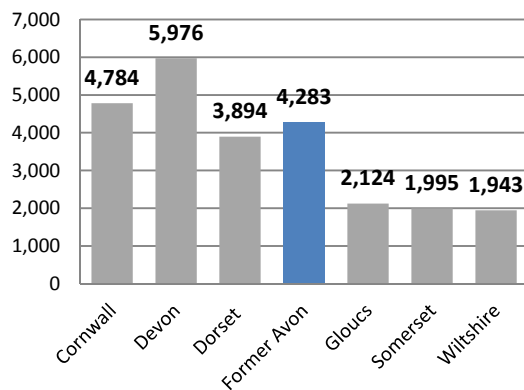


Former Avon - Key facts at a glance

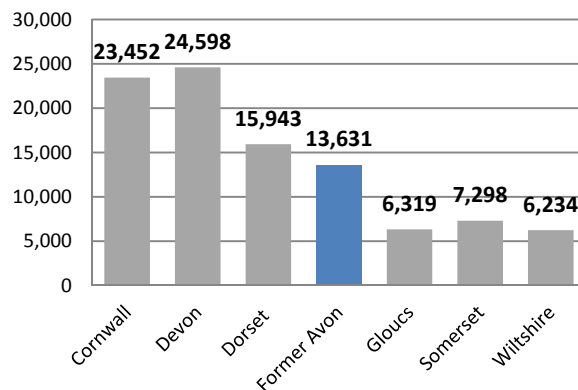


Former Avon - Staying visits in the regional context

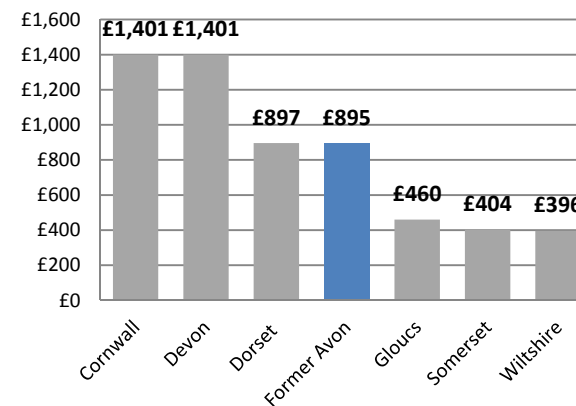
All staying trips (000's)



All staying nights (000's)



All staying spend (millions)



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cornwall	4,430	354	20,970	2,482	£1,253	£148
Devon	5,505	471	21,050	3,548	£1,202	£199
Dorset	3,501	393	12,496	3,447	£671	£226
Former Avon	3,276	1,007	7,705	5,926	£568	£328
Gloucestershire	1,853	271	4,571	1,748	£337	£123
Somerset	1,814	181	6,013	1,285	£338	£66
Wiltshire	1,625	318	4,340	1,894	£283	£113

Former Avon - Staying visits by accommodation type

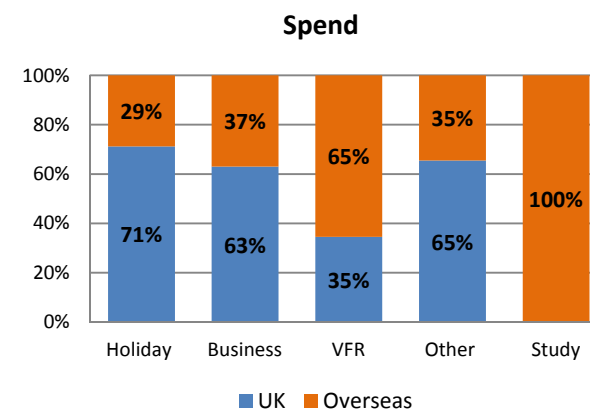
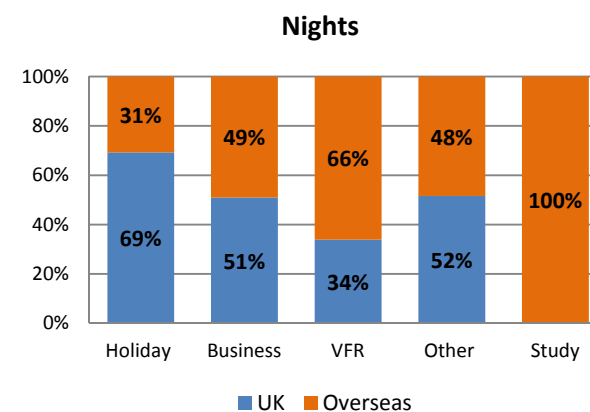
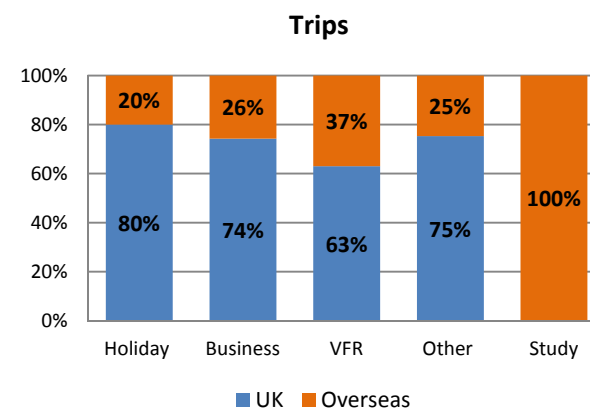
Domestic tourists	Trips	Nights	Spend
Serviced	1,630,900	3,216,000	£371,301,000
Self catering	227,000	823,000	£66,721,000
Touring caravans /tents	38,300	160,000	£5,589,000
Static vans/holiday centres	22,200	98,000	£4,175,000
Group/campus	107,000	179,000	£8,758,000
Paying guest in private homes	0	0	£0
Second homes	12,700	53,000	£1,146,000
Boat moorings	17,500	65,000	£3,622,000
Other	31,600	105,000	£6,854,000
Staying with friends and relatives	1,188,600	3,007,000	£99,590,000
Total	3,276,300	7,705,000	£567,756,000

Overseas tourists	Trips	Nights	Spend
Serviced	506,500	1,336,000	£143,167,000
Self catering	16,300	269,000	£10,869,000
Touring caravans /tents	2,670	12,000	£506,000
Static vans/holiday centres	200	2,000	£67,000
Group/campus	83,700	1,321,000	£74,170,000
Paying guest in private homes	33,200	511,000	£14,118,000
Second homes	2,600	33,000	£1,253,000
Boat moorings	0	0	£0
Other	73,100	249,000	£10,015,000
Staying with friends and relatives	287,500	2,193,000	£73,354,000
Total	1,007,000	5,926,000	£327,518,000

Former Avon - Staying visits by purpose

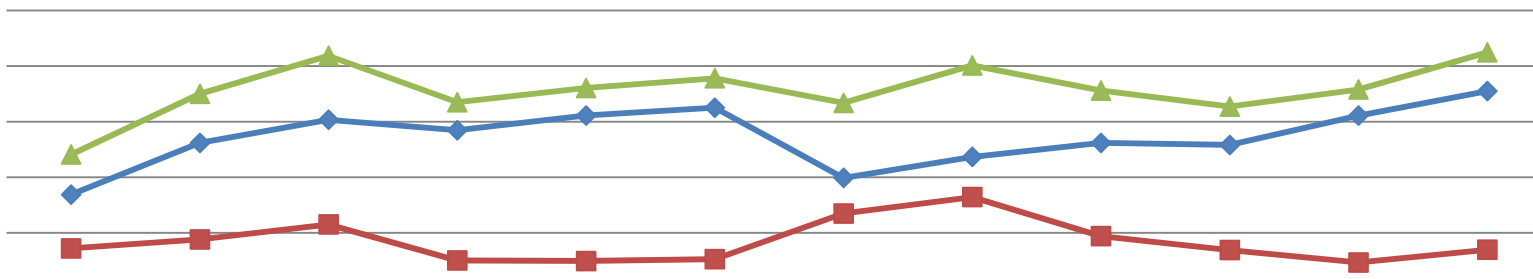
Domestic tourists	Trips	Nights	Spend
Holiday	2,380,200	5,970,000	£425,783,000
Business	464,700	775,000	£92,391,000
Visits to friends and relatives	381,700	847,000	£38,243,000
Other	49,700	113,000	£11,338,000
Study	0	0	£0
Total	3,276,300	7,705,000	£567,756,000

Overseas tourists	Trips	Nights	Spend
Holiday	594,300	2,650,000	£172,489,000
Business	161,000	746,000	£54,140,000
Visits to friends and relatives	224,200	1,651,000	£72,554,000
Other	16,300	106,000	£5,976,000
Study	10,000	772,000	£22,358,000
Total	1,007,000	5,926,000	£327,518,000



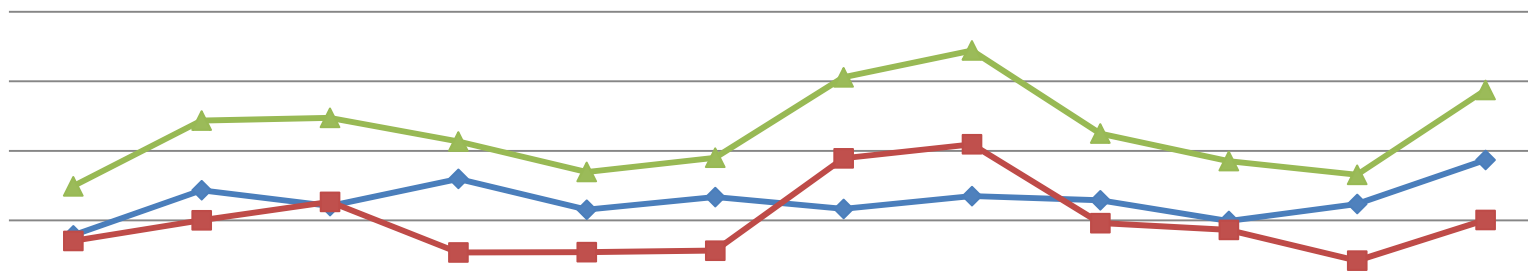
Former Avon - Estimated seasonality of staying visits

Seasonality - trips



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK trips (000's)	168.9	261.8	303.5	284.5	311.1	325.2	198.9	236.7	261.8	258.1	310.9	354.9
OS trips (000's)	72.1	88.2	115.1	50.4	49.4	52.7	134.9	164.4	94.1	69.1	46.8	69.7
Total trips (000's)	241.0	350.0	418.6	335.0	360.5	377.9	333.7	401.1	355.9	327.2	357.8	424.6

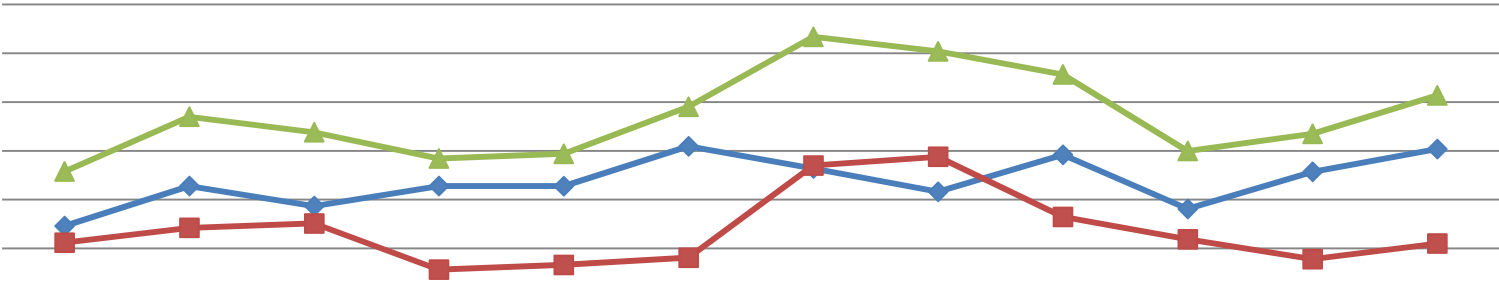
Seasonality - nights



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK nights (000's)	392.6	716.7	603.4	798.4	577.1	668.0	582.4	674.6	644.3	495.4	617.9	934.1
OS nights (000's)	352.4	500.5	633.4	268.7	271.0	282.1	946.4	1047.4	479.8	430.9	210.0	503.3
Total nights (000's)	745.0	1217.3	1236.8	1067.2	848.1	950.1	1528.8	1722.0	1124.1	926.3	828.0	1437.4

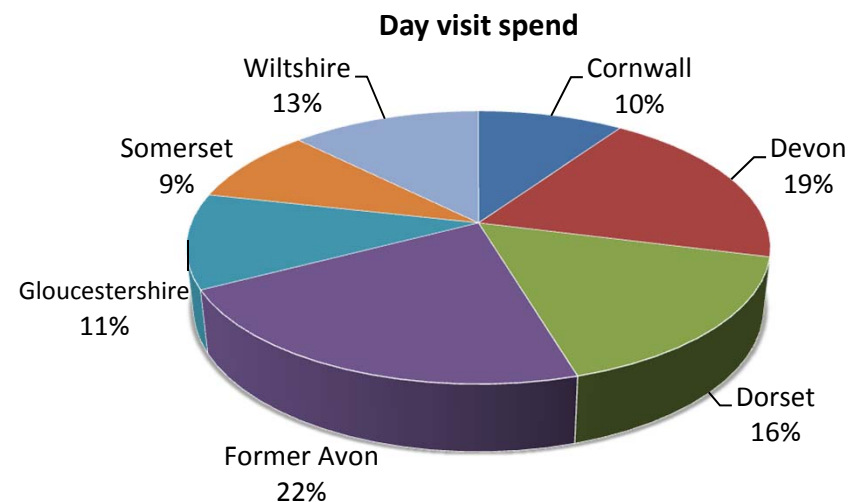
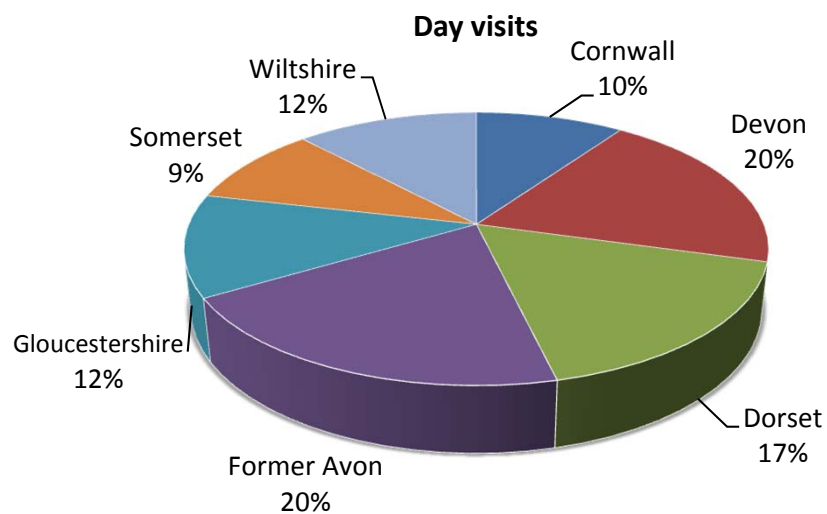
Former Avon - Estimated seasonality of staying visits

Seasonality - spend



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK spend (mn's)	29.2	45.5	37.4	45.5	45.5	61.9	52.8	43.2	58.4	36.2	51.4	60.7
OS spend (mn's)	22.3	28.4	30.2	11.3	13.2	16.2	54.0	57.6	32.9	23.7	15.6	22.0
Total spend (mn's)	51.5	74.0	67.6	56.8	58.8	78.1	106.7	100.8	91.3	59.9	67.0	82.7

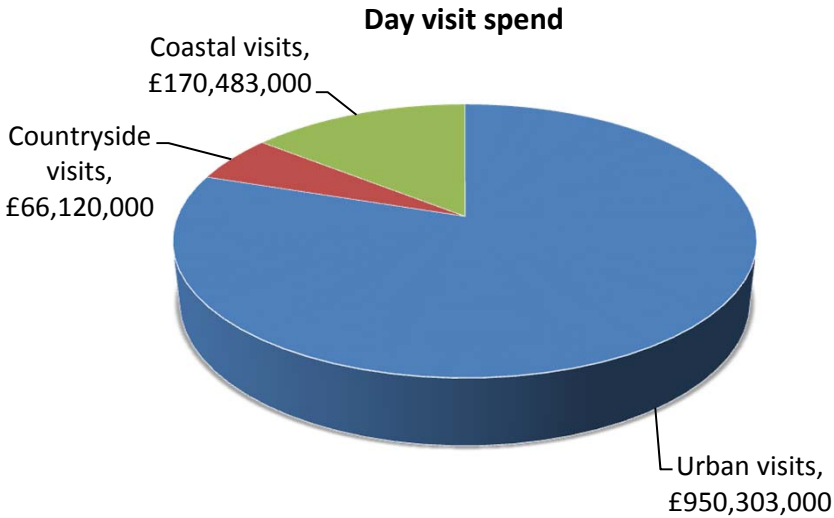
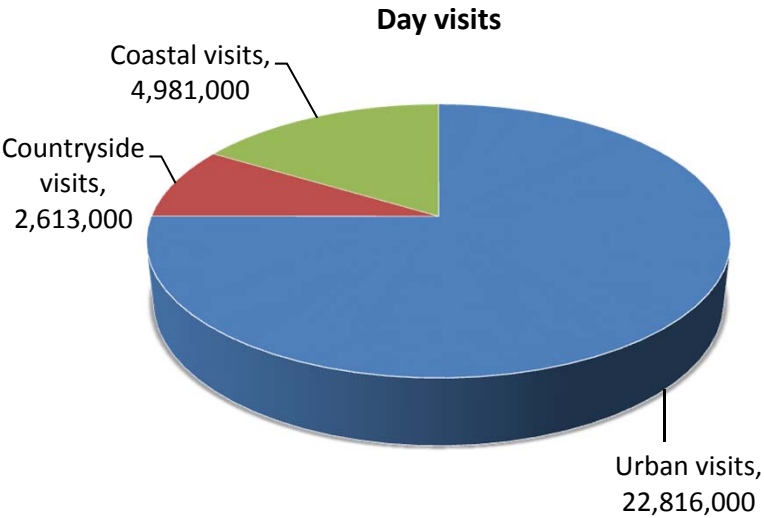
Former Avon - Day visits in the regional context



Area	Day visits (millions)	Day visit spend (millions)
Cornwall	14.7	£518.2
Devon	29.5	£1,051.4
Dorset	25.5	£891.1
Former Avon	30.4	£1,186.9
Gloucestershire	18.2	£609.0
Somerset	14.2	£485.6
Wiltshire	18.0	£677.8

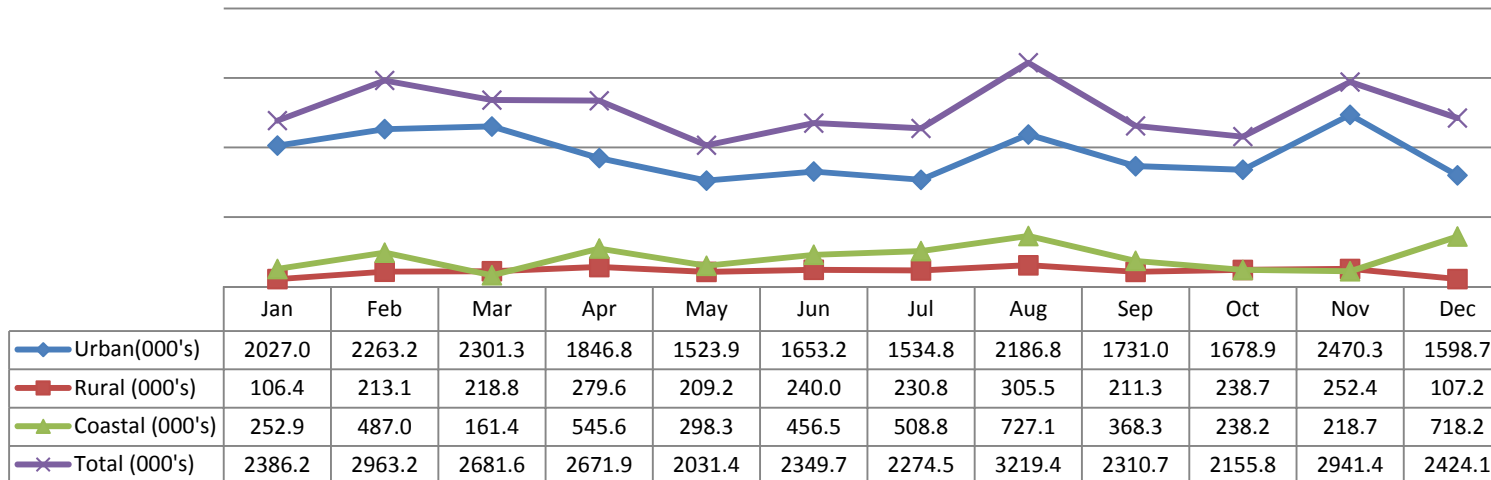
Former Avon - Day visits by location

Total day visits	Total day visit spend
30,410,000	£1,186,906,000

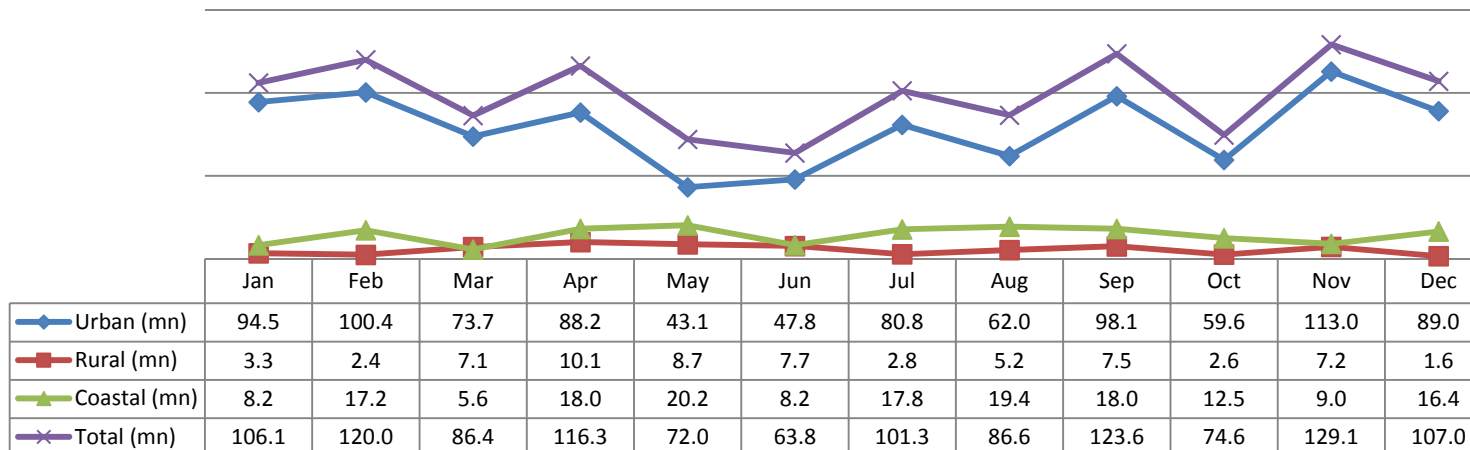


Former Avon - Estimated seasonality of day visits

Seasonality - day visits (000's)

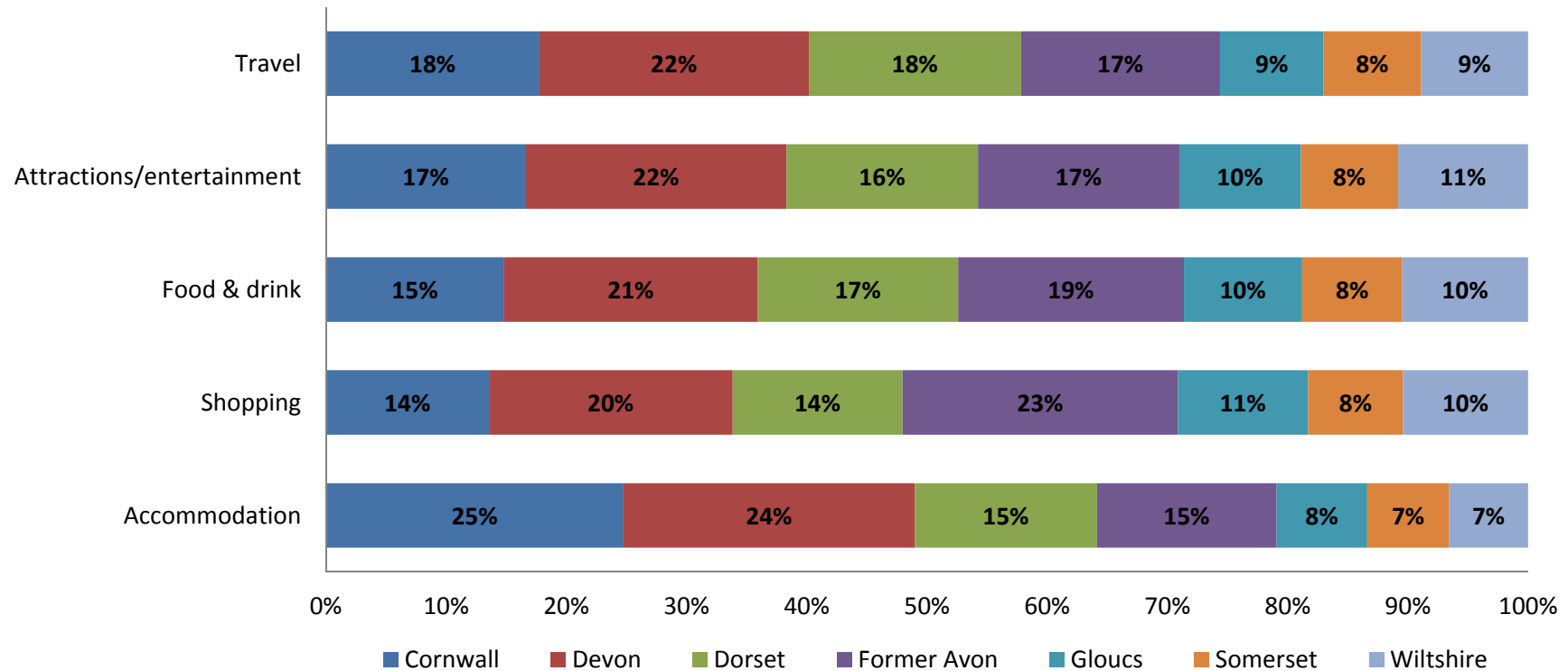


Seasonality - day visit spend (millions)



Former Avon – Direct visitor expenditure by category in the regional context

South West	Accommodation	Shopping	Food & drink	Attractions/entertainment	Travel	TOTAL
Spend	£2,108,836,000	£2,646,182,000	£3,576,774,000	£1,258,389,000	£1,682,935,000	£11,273,119,000
%	19%	23%	32%	11%	15%	100%



Former Avon – Direct visitor expenditure by category



Accommodation

- UK staying visitors £211,836,000
- Overseas staying visitors £102,857,000



Shopping

- UK staying visitors £69,041,000
- Overseas staying visitors £89,390,000
- Day visitors £447,709,000



Food & drink

- UK staying visitors £127,790,000
- Overseas staying visitors £72,228,000
- Day visitors £472,011,000



Attractions/entertainment

- UK staying visitors £58,247,000
- Overseas staying visitors £31,120,000
- Day visitors £121,435,000



Travel

- UK staying visitors £100,843,000
- Overseas staying visitors £31,922,000
- Day visitors £145,751,000

Former Avon – Other visitor related expenditure by category



Second Homes

£641,000



Boats

£1,000,000



Visiting friends and relatives (non-visitor spend)

£60,673,000

- 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.

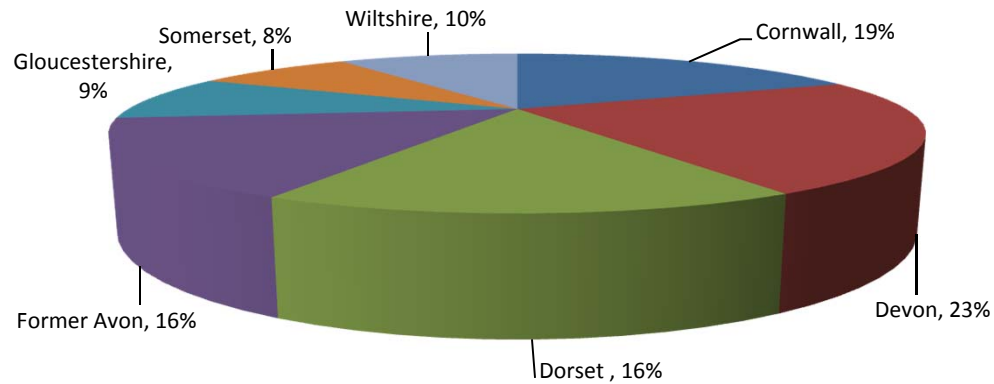
Former Avon – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£318,693,000	£9,440,000	£328,133,000
Retailing	£156,847,000	£443,232,000	£600,079,000
Catering	£194,017,000	£457,850,000	£651,867,000
Attractions/entertainment	£92,951,000	£130,633,000	£223,584,000
Transport	£79,658,000	£87,450,000	£167,108,000
Arising from non trip spend	£62,314,000	£0	£62,314,000
Total Direct	£904,480,000	£1,128,605,000	£2,033,085,000

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£904,480,000	£1,128,605,000	£2,033,085,000
Supplier and income induced	£375,860,000	£327,980,000	£703,840,000
Total	£1,280,340,000	£1,456,585,000	£2,736,925,000

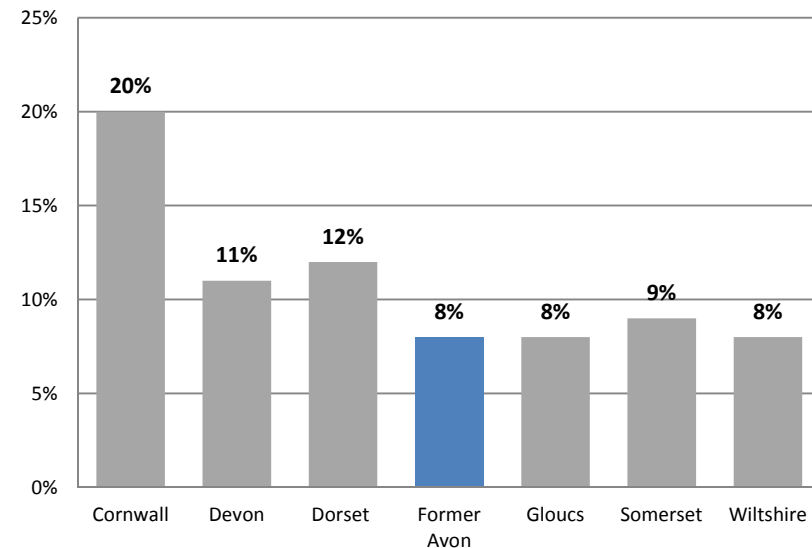
Former Avon – Tourism related employment in the regional context

Distribution of tourism related employment (FTE's)



Area	Number of FTE's
Cornwall	40,467
Devon	49,162
Dorset	34,628
Former Avon	33,499
Gloucestershire	19,705
Somerset	17,592
Wiltshire	20,704

% of all employment



Former Avon – Tourism related employment

Estimated actual employment



Full time equivalent employment (FTE's)



Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	4,187	124	4,312
Retailing	1,180	3,295	4,475
Catering	2,371	5,605	7,976
Attractions/entertainment	1,505	2,110	3,614
Transport	455	506	961
Arising from non trip spend	989	0	989
Total Direct	10,688	11,640	22,327