

The Economic Impact of North Somerset's Visitor Economy 2019

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



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Introduction

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in North Somerset and the Former Avon area in 2019. The Former Avon Area consists of Bath and North East Somerset, Bristol, North Somerset and South Gloucestershire.

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 2019, including key facts about the economy, weather and key events please see Appendix 2 of this report.

Value of Tourism 2019

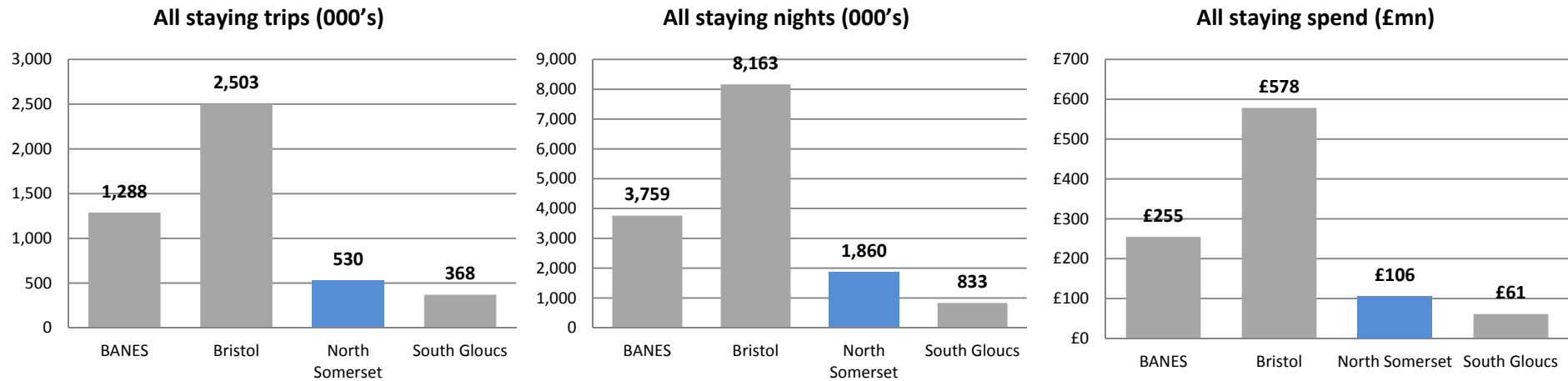
North Somerset

Key Facts	
530,000	Staying visitor trips
1,860,000	Staying visitor nights
£106,235,000	Staying visitor spend
7,745,000	Day visits
£249,324,000	Day visitor spend
£355,559,000	Direct visitor spend
£9,314,000	Other related spend
£364,873,000	TOTAL VISITOR RELATED SPEND
6,756	Estimated actual employment
4,855	FTE employment
6%	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. 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)
BANES	887	401	1,939	1,820	£151	£104
Bristol	1,867	636	4,137	4,026	£308	£271
North Somerset	472	58	1,493	367	£87	£20
South Gloucestershire	352	16	746	87	£55	£6

North Somerset - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	176,300	417,000	£41,898,000
Self catering	49,600	211,000	£15,474,000
Touring caravans /tents	32,400	149,000	£4,964,000
Static vans/holiday centres	27,900	148,000	£6,073,000
Group/campus	1,100	3,000	£113,000
Paying guest in private homes	0	0	£0
Second homes	3,800	18,000	£405,000
Boat moorings	6,500	27,000	£1,443,000
Other	4,200	15,000	£919,000
Staying with friends and relatives	170,500	505,000	£15,324,000
Total	472,000	1,493,000	£86,613,000

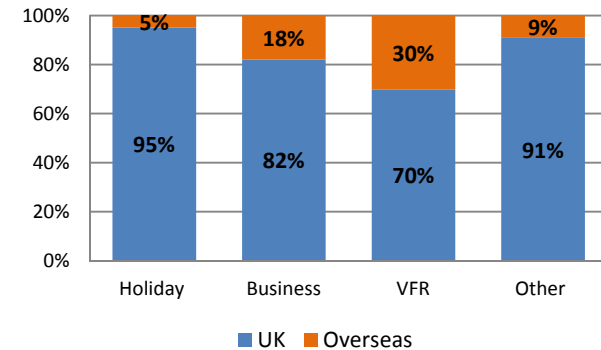
Overseas tourists	Trips	Nights	Spend
Serviced	26,900	94,000	£9,443,000
Self catering	2,000	33,000	£1,314,000
Touring caravans /tents	2,100	10,000	£383,000
Static vans/holiday centres	300	2,000	£90,000
Group/campus	500	9,000	£415,000
Paying guest in private homes	0	0	£0
Second homes	400	6,000	£504,000
Boat moorings	0	0	£0
Other	4,200	14,000	£749,000
Staying with friends and relatives	21,300	200,000	£6,726,000
Total	58,000	367,000	£19,622,000

North Somerset - Staying visits by purpose

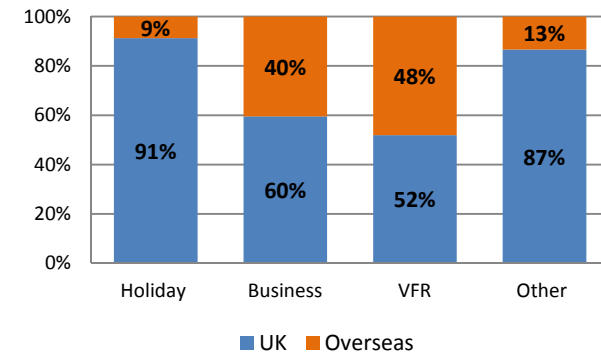
Domestic tourists	Trips	Nights	Spend
Holiday	348,000	1,156,000	£65,971,000
Business	55,000	150,000	£13,281,000
Visits to friends and relatives	60,000	162,000	£5,993,000
Other	10,000	26,000	£1,367,000
Study	0	0	£0
Total	472,000	1,493,000	£86,613,000

Overseas tourists	Trips	Nights	Spend
Holiday	19,000	111,000	£6,533,000
Business	12,000	102,000	£5,375,000
Visits to friends and relatives	26,000	150,000	£7,452,000
Other	1,000	4,000	£262,000
Study	0	0	£0
Total	58,000	367,000	£19,622,000

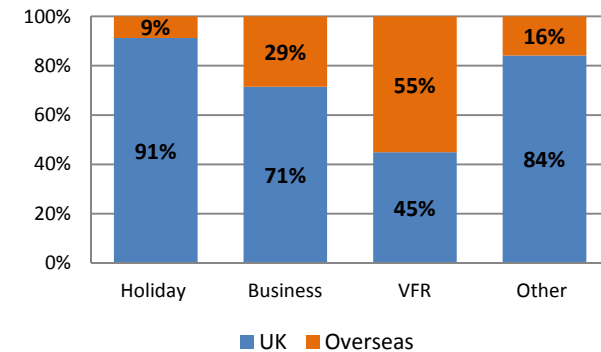
Trips



Nights



Spend



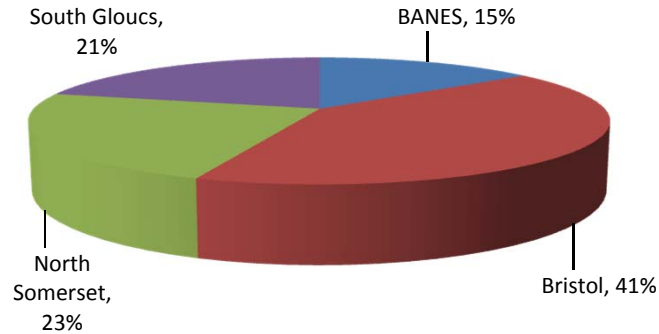
North Somerset – Day visits

Information on day visits within this report has been derived from the 2019 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.

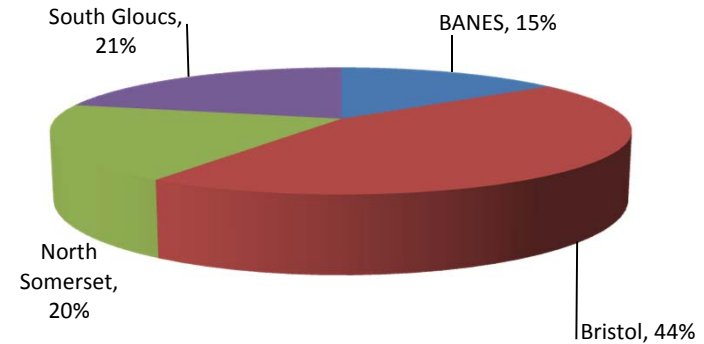
The GBDVS distinguishes between day visits to a town or city; to the seaside and coast; and to the countryside. Different drivers are used within the model to distribute these trips. Local 'drivers' such as attraction footfall, quality and size of countryside and coastline are factored into the model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

North Somerset - Day visits in the Former Avon area context

All day visits



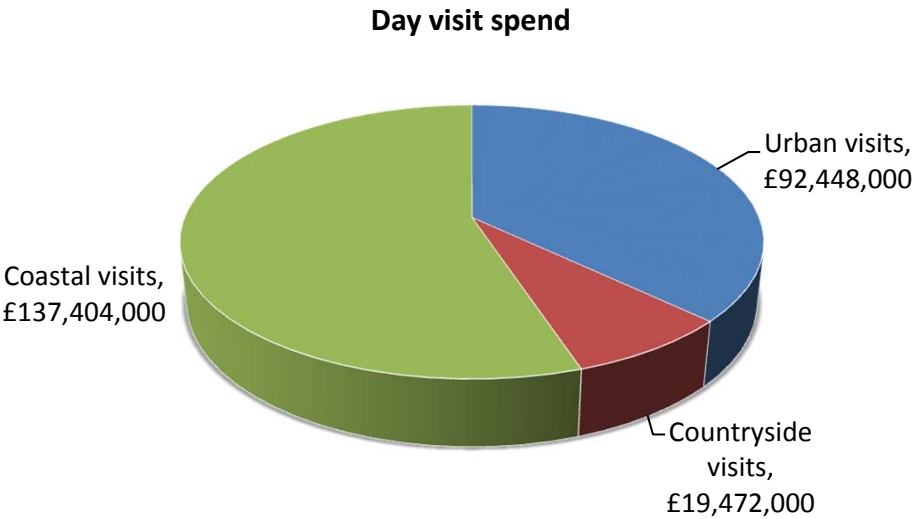
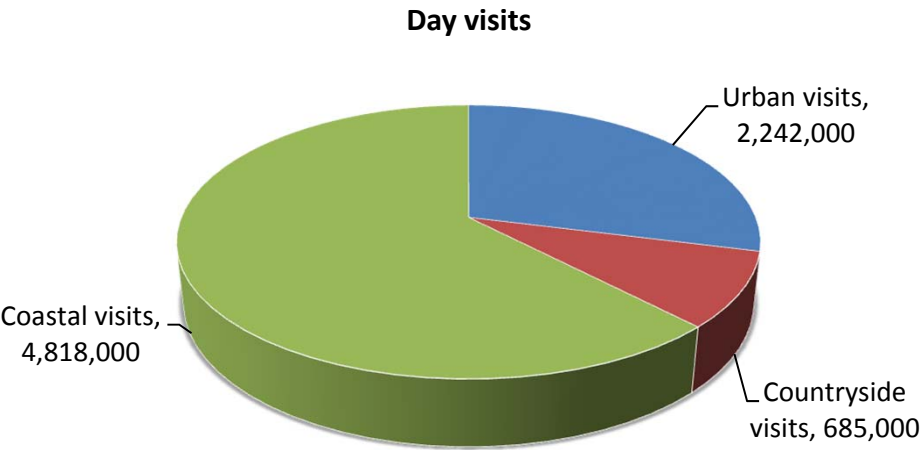
All day visit spend



Area	Day visits	Day visit spend
BANES	4.9	£190.2
Bristol	13.7	£563.1
North Somerset	7.7	£249.3
South Gloucestershire	7.0	£270.7

North Somerset - Day visits by location

Total day visits	Total day visit spend
7,745,000	£249,324,000



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 £32,255,000
- Overseas staying visitors £6,000,000



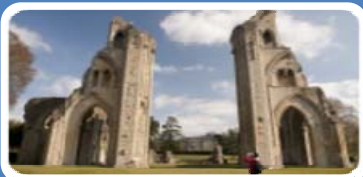
Shopping

- UK staying visitors £10,587,000
- Overseas staying visitors £5,194,000
- Day visitors £58,181,000



Food & drink

- UK staying visitors £19,494,000
- Overseas staying visitors £4,505,000
- Day visitors £114,753,000



Attractions/entertainment

- UK staying visitors £8,943,000
- Overseas staying visitors £1,884,000
- Day visitors £26,985,000



Travel

- UK staying visitors £15,334,000
- Overseas staying visitors £2,038,000
- Day visitors £49,404,000

North Somerset – Other visitor related expenditure by category



Second Homes

£281,000



Boats

£500,000



Visiting friends and relatives (non-visitor spend)

£8,533,000

- 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)

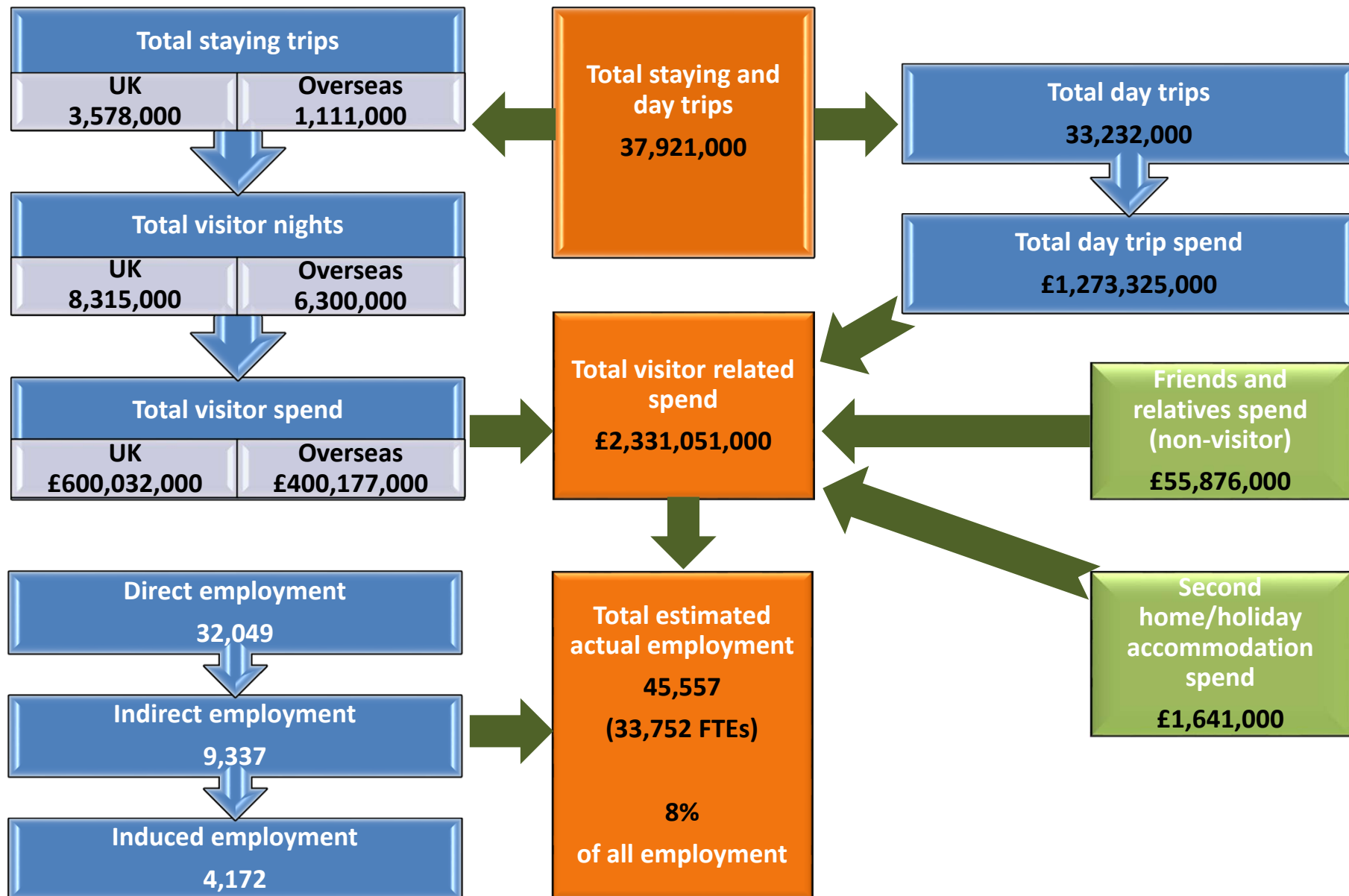


Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	507	30	537
Retailing	120	442	562
Catering	288	1,377	1,665
Attractions/entertainment	175	448	623
Transport	67	190	257
Arising from non trip spend	145	0	145
Total Direct	1,301	2,487	3,788

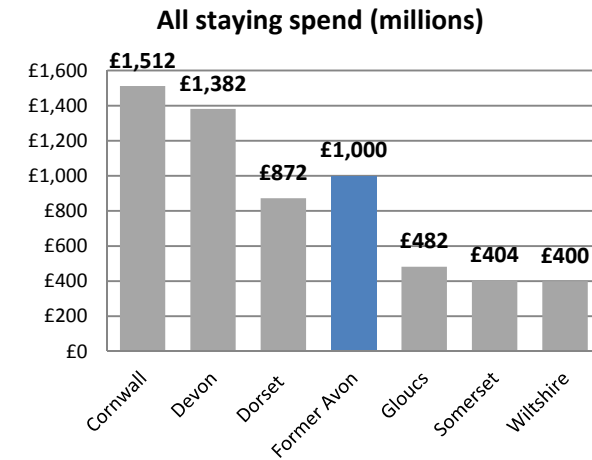
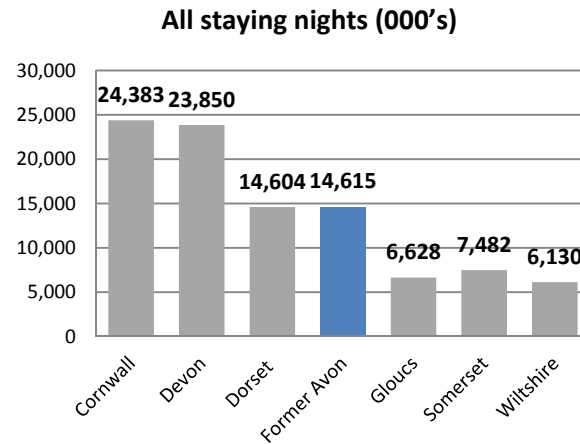
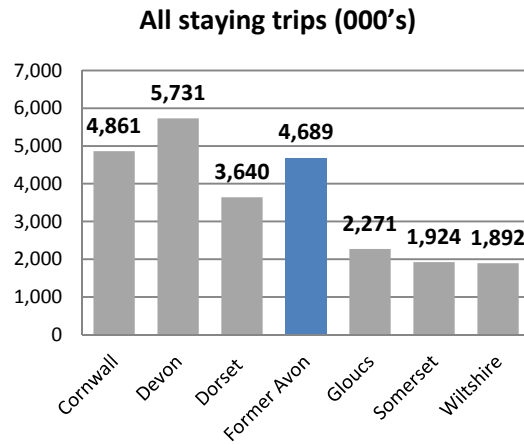
Former Avon 2019



Former Avon - Key facts at a glance



Former Avon - Staying visits in the regional context



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cornwall	4,476	385	21,780	2,603	£1,347	£165
Devon	5,273	458	20,491	3,359	£1,184	£198
Dorset	3,283	357	11,370	3,234	£666	£207
Former Avon	3,578	1,111	8,315	6,300	£600	£400
Gloucestershire	1,984	287	4,689	1,939	£335	£146
Somerset	1,736	188	6,113	1,369	£333	£71
Wiltshire	1,572	320	4,288	1,842	£290	£110

Former Avon - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	1,644,400	3,161,000	£357,588,000
Self catering	366,000	1,239,000	£101,849,000
Touring caravans /tents	44,400	191,000	£6,555,000
Static vans/holiday centres	27,900	148,000	£6,073,000
Group/campus	103,400	220,000	£9,664,000
Paying guest in private homes	0	0	£0
Second homes	10,700	45,000	£1,089,000
Boat moorings	16,200	59,000	£3,346,000
Other	32,300	94,000	£6,441,000
Staying with friends and relatives	1,333,000	3,159,000	£107,427,000
Total	3,578,000	8,315,000	£600,032,000

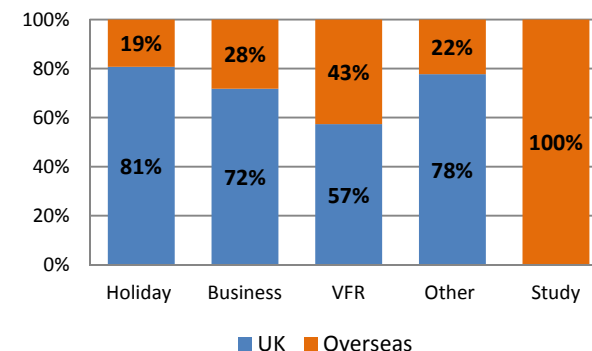
Overseas tourists	Trips	Nights	Spend
Serviced	530,400	1,383,000	£163,684,000
Self catering	32,200	386,000	£18,784,000
Touring caravans /tents	4,289	15,000	£631,000
Static vans/holiday centres	300	2,000	£90,000
Group/campus	99,700	1,402,000	£81,134,000
Paying guest in private homes	31,000	417,000	£16,403,000
Second homes	2,500	24,000	£2,370,000
Boat moorings	0	0	£0
Other	67,600	180,000	£11,072,000
Staying with friends and relatives	342,200	2,491,000	£106,009,000
Total	1,111,000	6,300,000	£400,177,000

Former Avon - Staying visits by purpose

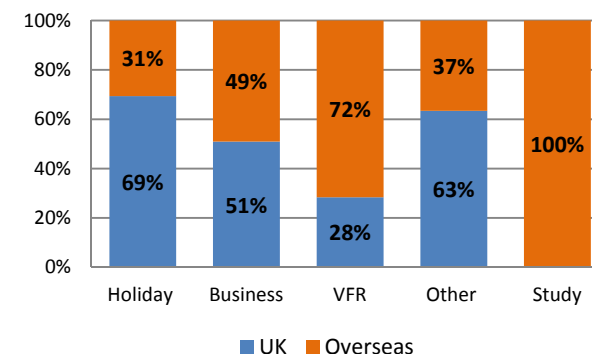
Domestic tourists	Trips	Nights	Spend
Holiday	2,815,700	6,780,000	£478,672,000
Business	389,700	782,000	£85,442,000
Visits to friends and relatives	321,200	649,000	£29,246,000
Other	53,000	104,000	£6,673,000
Study	0	0	£0
Total	3,578,000	8,315,000	£600,032,000

Overseas tourists	Trips	Nights	Spend
Holiday	673,700	2,992,000	£223,639,000
Business	153,200	754,000	£54,474,000
Visits to friends and relatives	238,700	1,643,000	£76,236,000
Other	15,200	60,000	£6,695,000
Study	30,000	851,000	£39,132,000
Total	1,111,000	6,300,000	£400,177,000

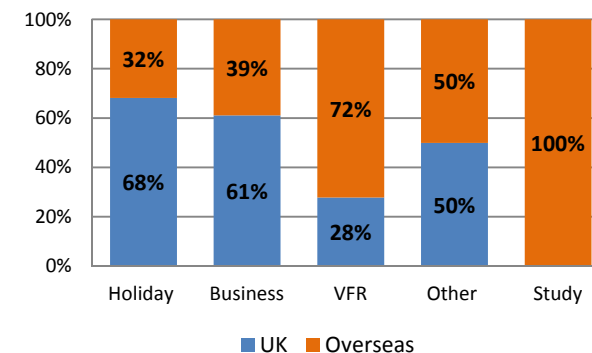
Trips



Nights

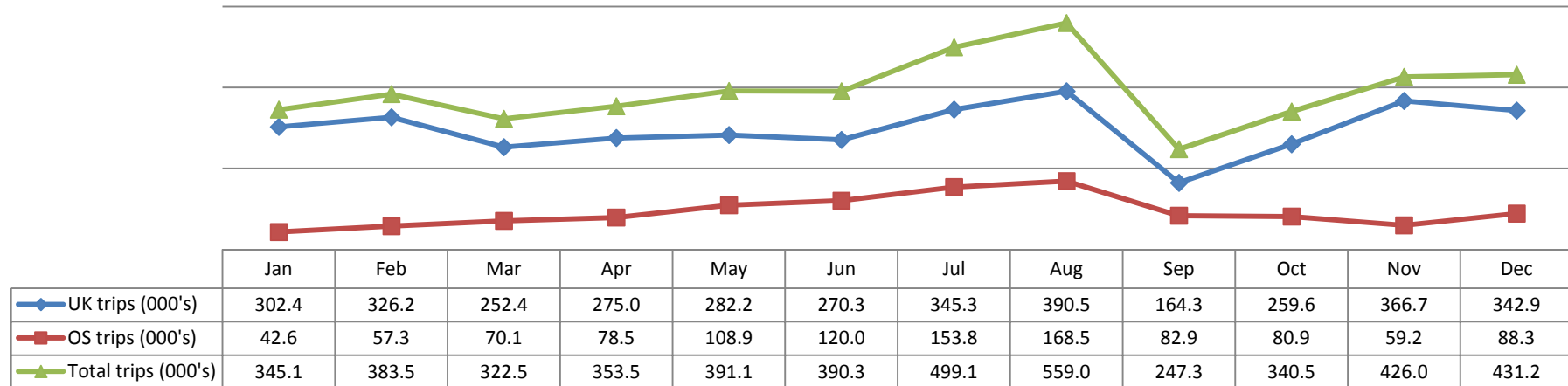


Spend

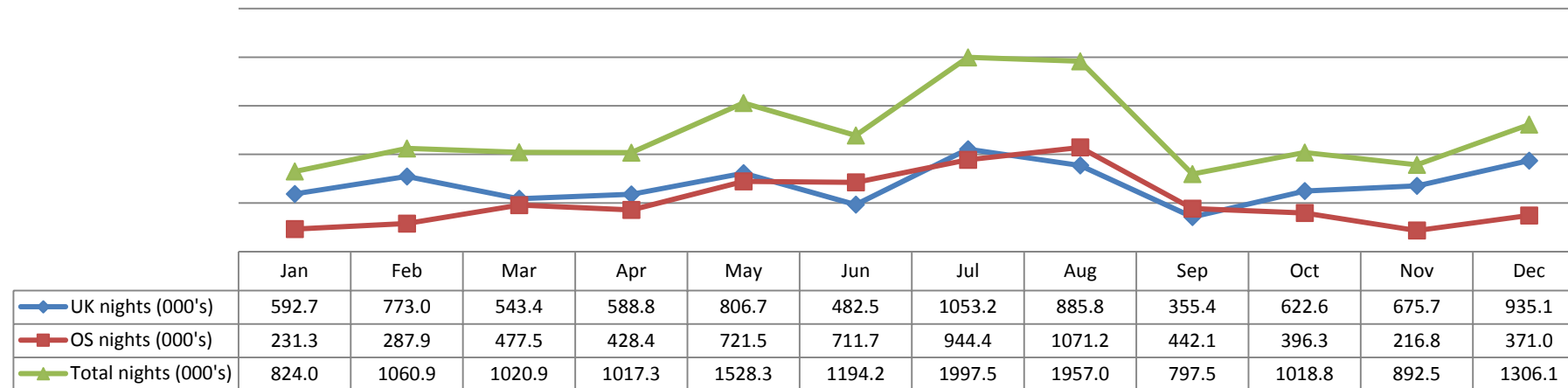


Former Avon - Estimated seasonality of staying visits

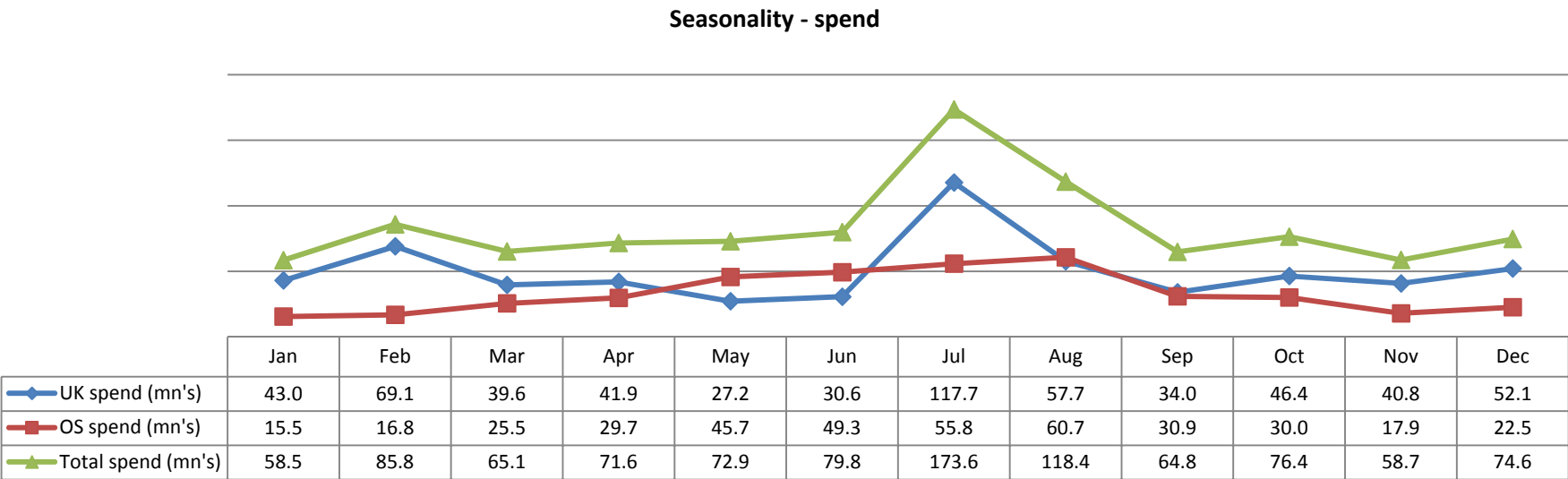
Seasonality - trips



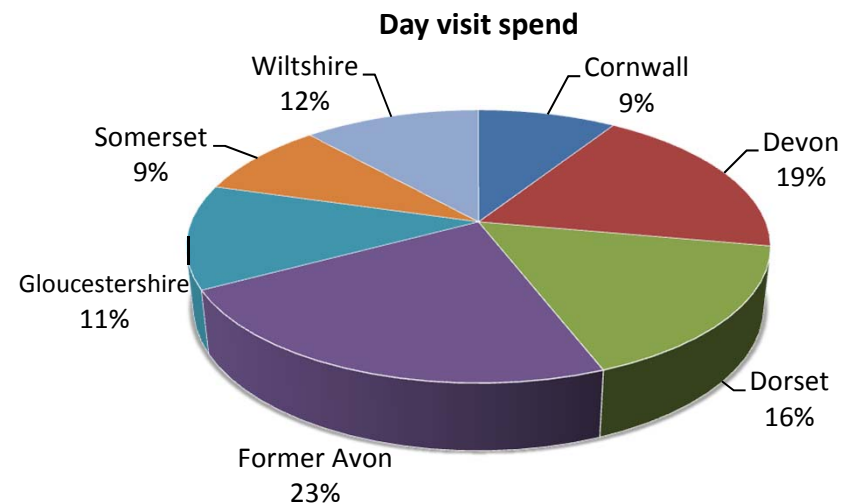
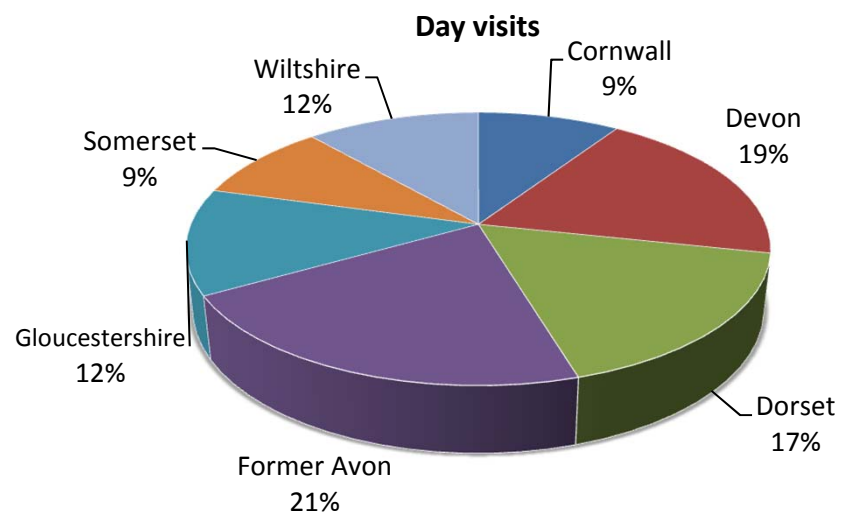
Seasonality - nights



Former Avon - Estimated seasonality of staying visits



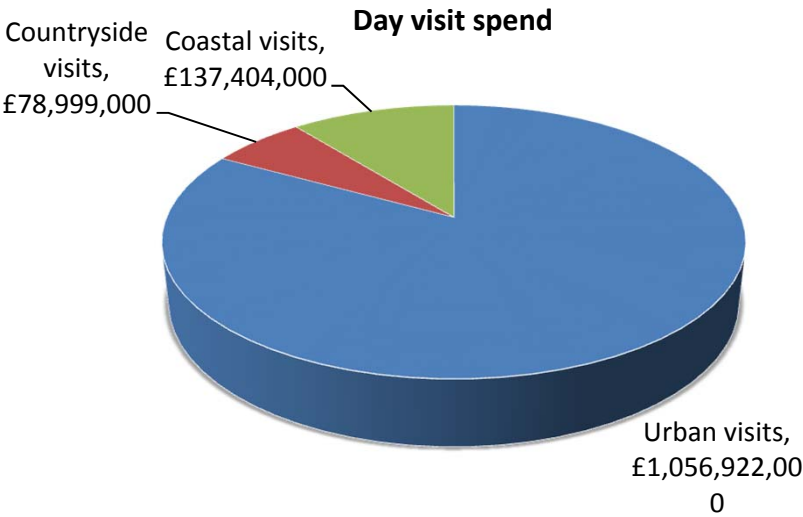
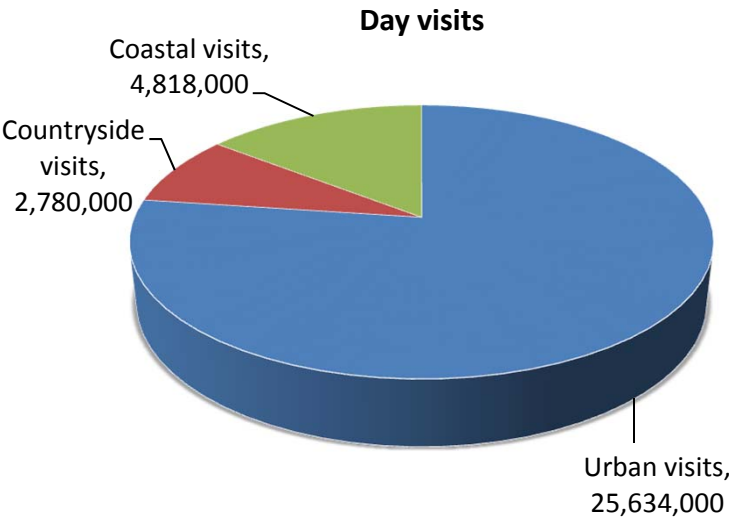
Former Avon - Day visits in the regional context



Area	Day visits (millions)	Day visit spend (millions)
Cornwall	14.5	£501.9
Devon	29.6	£1,035.9
Dorset	26.4	£900.5
Former Avon	33.2	£1,273.3
Gloucestershire	19.5	£680.8
Somerset	14.4	£492.1
Wiltshire	17.7	£641.9

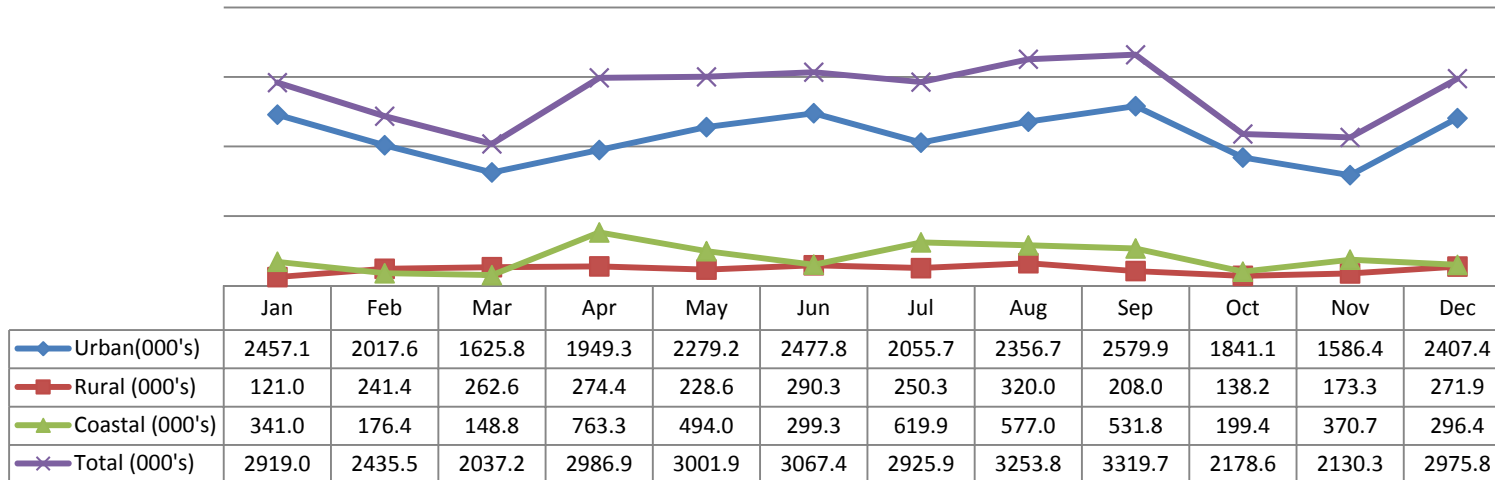
Former Avon - Day visits by location

Total day visits	Total day visit spend
33,232,000	£1,273,325,000

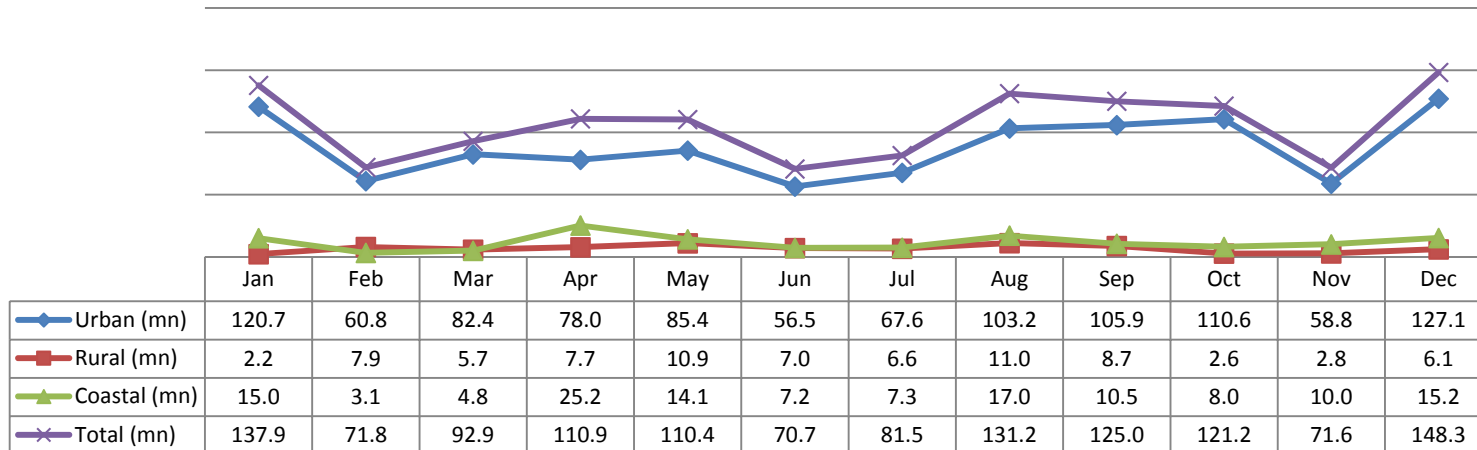


Former Avon - Estimated seasonality of day visits

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	£2,162,081,000	£2,777,071,000	£3,649,286,000	£1,293,119,000	£1,696,693,000	£11,578,250,000
%	19%	24%	32%	11%	15%	100%



Former Avon – Direct visitor expenditure by category



Accommodation

- UK staying visitors £226,254,000
- Overseas staying visitors £125,533,000



Shopping

- UK staying visitors £73,479,000
- Overseas staying visitors £110,532,000
- Day visitors £493,728,000



Food & drink

- UK staying visitors £133,899,000
- Overseas staying visitors £87,136,000
- Day visitors £500,383,000



Attractions/entertainment

- UK staying visitors £62,037,000
- Overseas staying visitors £38,702,000
- Day visitors £130,502,000



Travel

- UK staying visitors £104,361,000
- Overseas staying visitors £38,272,000
- Day visitors £148,713,000

Former Avon – Other visitor related expenditure by category



Second Homes

£641,000



Boats

£1,000,000



Visiting friends and relatives (non-visitor spend)

£55,876,000

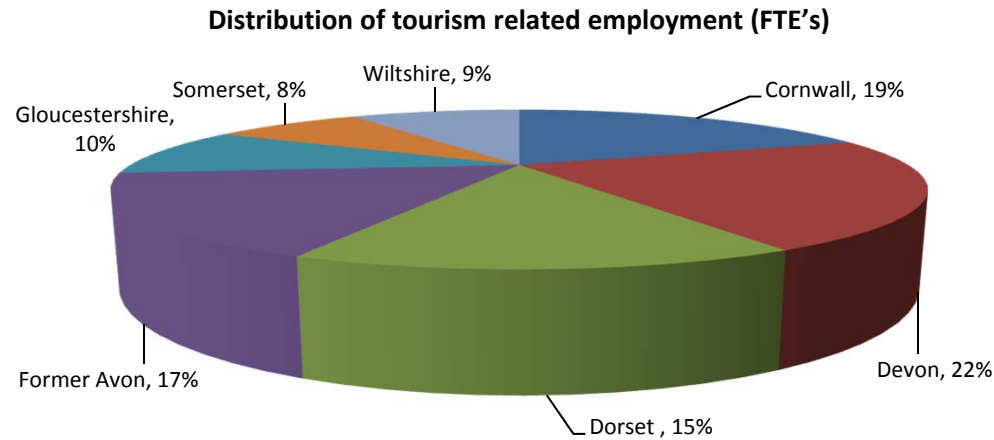
- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay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

Former Avon – Business turnover

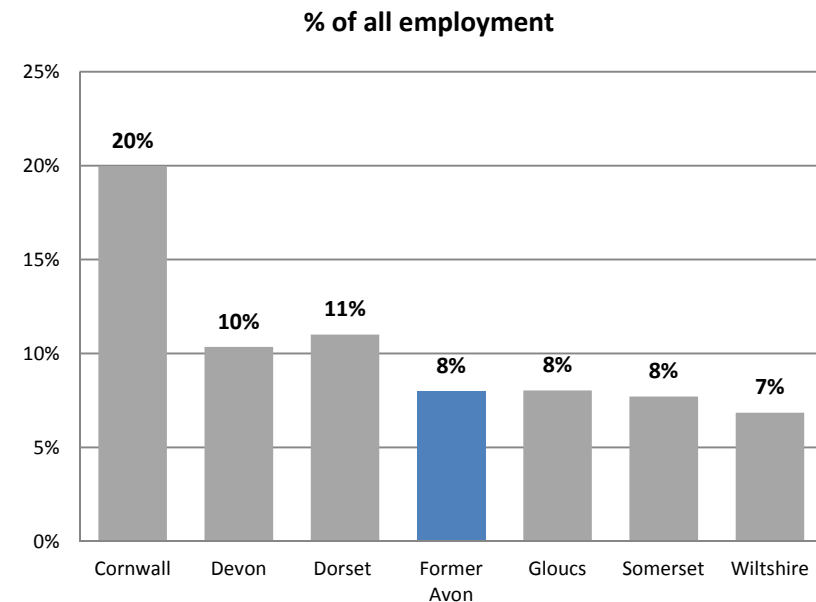
Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£356,208,000	£10,007,000	£366,215,000
Retailing	£182,171,000	£488,790,000	£670,961,000
Catering	£214,404,000	£485,372,000	£699,776,000
Attractions/entertainment	£104,790,000	£140,443,000	£245,233,000
Transport	£85,580,000	£89,228,000	£174,808,000
Arising from non trip spend	£57,517,000	£0	£57,517,000
Total Direct	£1,000,670,000	£1,213,840,000	£2,214,510,000

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£1,000,670,000	£1,213,840,000	£2,214,510,000
Supplier and income induced	£409,396,000	£352,815,000	£762,211,000
Total	£1,410,066,000	£1,566,655,000	£2,976,721,000

Former Avon – Tourism related employment in the regional context



Area	Number of FTE's
Cornwall	39,511
Devon	45,237
Dorset	30,770
Former Avon	33,752
Gloucestershire	19,849
Somerset	15,957
Wiltshire	18,469



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	4,137	118	4,255
Retailing	1,239	3,326	4,565
Catering	2,356	5,407	7,763
Attractions/entertainment	1,451	1,965	3,416
Transport	488	522	1,010
Arising from non trip spend	894	0	894
Total Direct	10,564	11,339	21,903