

# The Economic Impact of North Somerset's Visitor Economy 2016

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



January 2018





# Introduction

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This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in North Somerset and the West of England area in 2016. The West of England 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 2016, including key facts about the economy, weather and key events please see Appendix 2 of this report.

# Value of Tourism 2016

## North Somerset

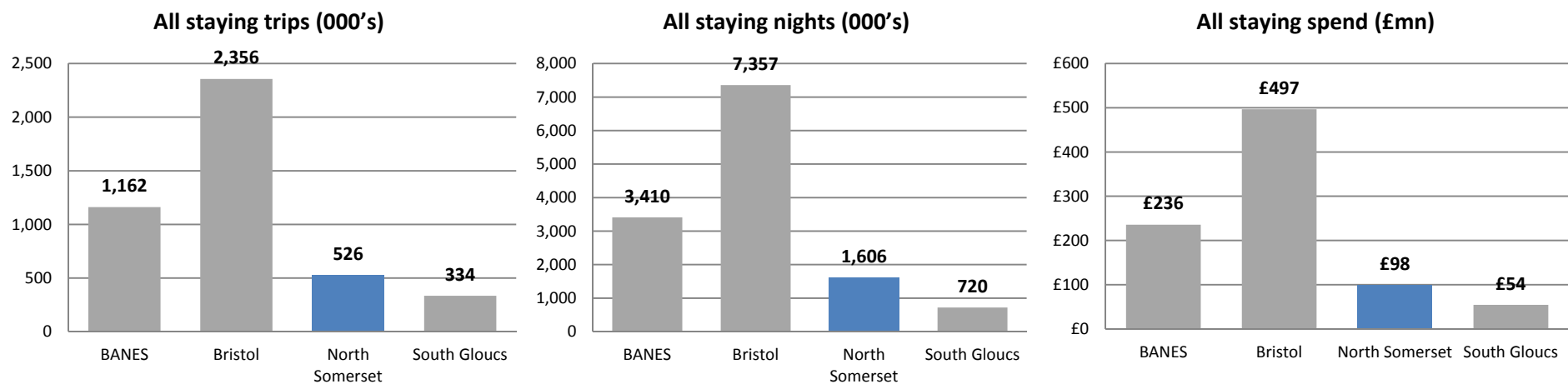
Key Facts	
526,000	Staying visitor trips
1,606,000	Staying visitor nights
£98,248,000	Staying visitor spend
7,683,000	Day visits
£266,976,000	Day visitor spend
£365,224,000	Direct visitor spend
£10,115,000	Other related spend
£375,339,000	TOTAL VISITOR RELATED SPEND
6,996	Estimated actual employment
5,031	FTE employment
7%	Proportion of all employment

## North Somerset – Staying visits

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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 West of England 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	828	334	1,743	1,667	£138	£97
Bristol	1,786	570	3,796	3,561	£294	£203
North Somerset	<b>475</b>	<b>51</b>	<b>1,300</b>	<b>306</b>	<b>£81</b>	<b>£17</b>
South Gloucestershire	329	5	701	19	£53	£1

## North Somerset - Staying visits by accommodation type

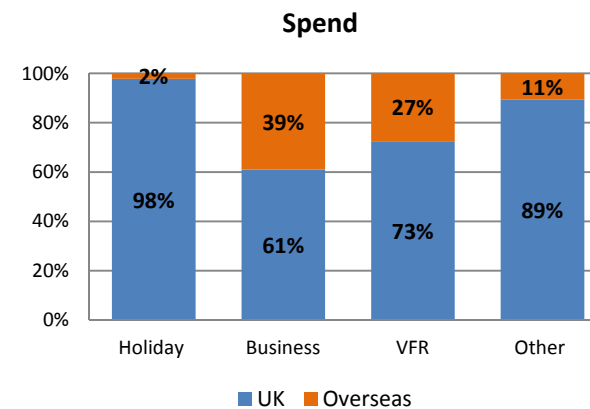
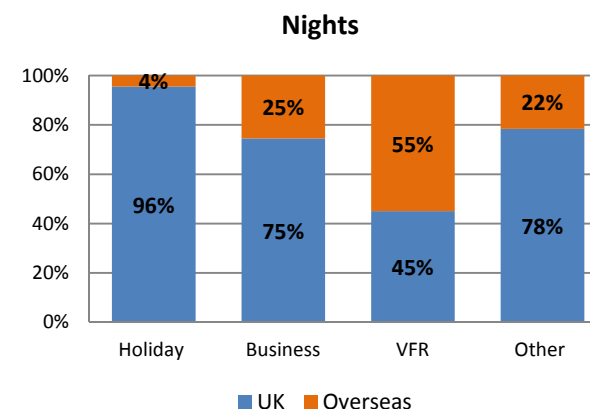
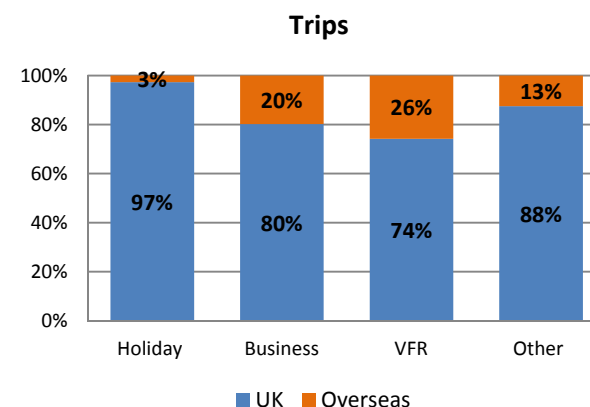
Domestic tourists	Trips	Nights	Spend
Serviced	194,600	404,000	£43,740,000
Self catering	37,100	147,000	£10,942,000
Touring caravans /tents	27,100	119,000	£4,303,000
Static vans/holiday centres	20,400	91,000	£3,680,000
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	3,600	19,000	£380,000
Boat moorings	7,000	32,000	£1,610,000
Other	3,600	11,000	£980,000
Staying with friends and relatives	182,000	477,000	£15,452,000
<b>Total</b>	<b>475,000</b>	<b>1,300,000</b>	<b>£81,086,000</b>

Overseas tourists	Trips	Nights	Spend
Serviced	22,900	76,000	£8,043,000
Self catering	1,400	26,000	£1,161,000
Touring caravans /tents	1,600	8,000	£328,000
Static vans/holiday centres	200	1,000	£57,000
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	400	6,000	£292,000
Boat moorings	0	0	£0
Other	5,600	16,000	£911,000
Staying with friends and relatives	19,200	172,000	£6,370,000
<b>Total</b>	<b>51,000</b>	<b>306,000</b>	<b>£17,162,000</b>

# North Somerset - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	323,000	920,000	£52,140,000
Business	69,000	196,000	£20,914,000
Visits to friends and relatives	69,000	154,000	£6,456,000
Other	14,000	29,000	£1,576,000
Study	0	0	£0
<b>Total</b>	<b>475,000</b>	<b>1,300,000</b>	<b>£81,086,000</b>

Overseas tourists	Trips	Nights	Spend
Holiday	9,000	43,000	£1,159,000
Business	17,000	67,000	£13,370,000
Visits to friends and relatives	24,000	188,000	£2,447,000
Other	2,000	8,000	£186,000
Study	0	0	£0
<b>Total</b>	<b>51,000</b>	<b>306,000</b>	<b>£17,162,000</b>





## North Somerset – Day visits

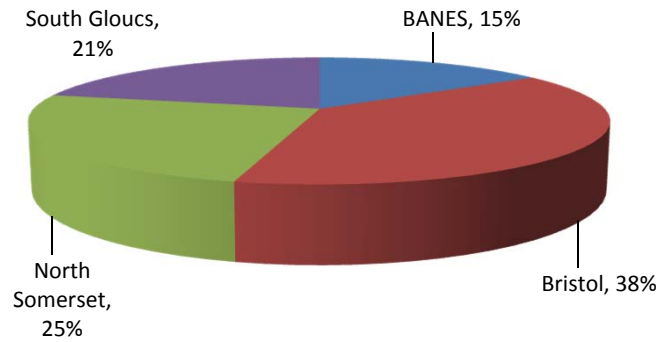
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Information on day visits within this report has been derived from the 2016 Great Britain Day Visit Survey (GBDVS). The survey, which was first undertaken in 2011, provides a much needed update on day visit activity in Great Britain and generally speaking 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.

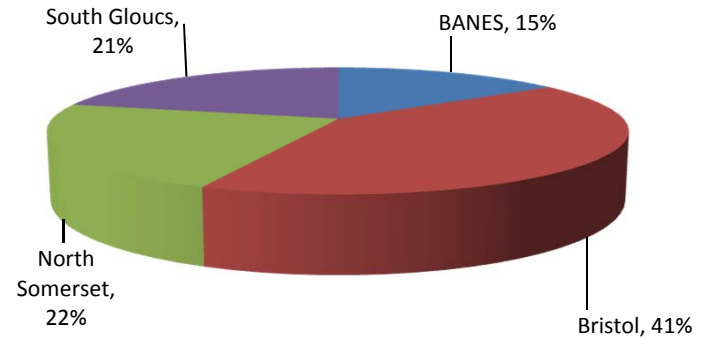
The GBDVS distinguishes between day visits to a town or city; to the seaside and coast; and to the countryside. Different drivers are used within the model to distribute these trips. Local 'drivers' such as attraction footfall, quality and size of countryside and coastline are factored into the model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

# North Somerset - Day visits in the West of England area context

All day visits



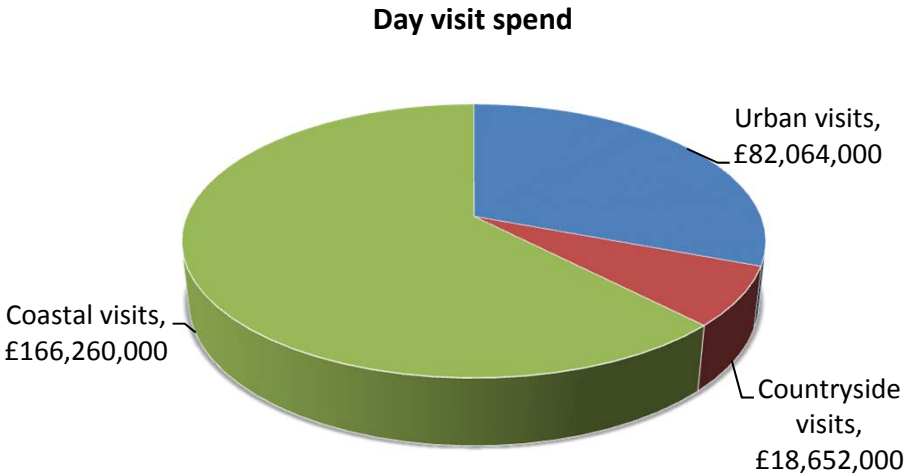
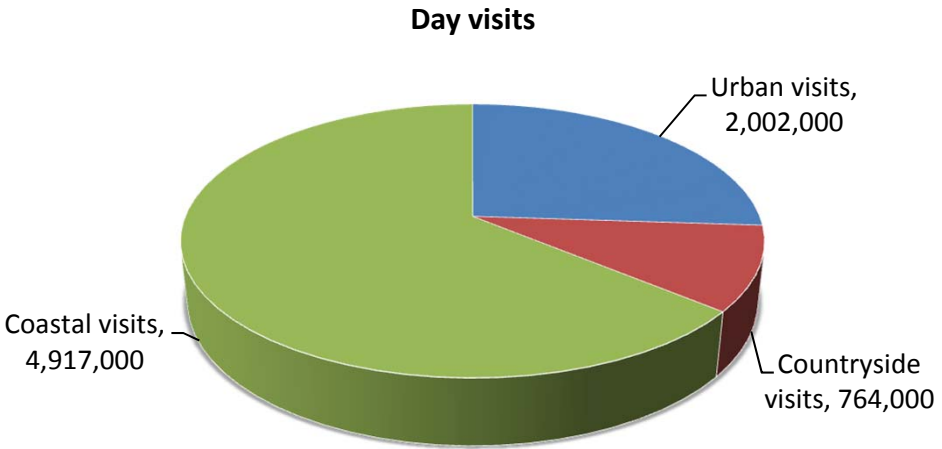
All day visit spend



Area	Day visits	Day visit spend
BANES	4.8	£181.4
Bristol	11.9	£489.1
North Somerset	<b>7.7</b>	<b>£267.0</b>
South Gloucestershire	6.6	£251.1

# North Somerset - Day visits by location

Total day visits	Total day visit spend
7,683,000	£266,976,000



## North Somerset - Direct visitor expenditure by category

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Information on the breakdown of visitor spending is available from the three main tourism and day visitor surveys by type of visitor. The Model divides the expenditure between five sectors:

- Accommodation
- Shopping for gifts, clothes and other goods
- Eating and drinking in restaurants, cafes and inns
- Entry to attractions, entertainment and hire of goods and services
- Transport and travel costs including public transport, purchase of fuel and parking

The following pages look at the breakdown of this expenditure and business turnover arising from this expenditure.

By applying the expenditure breakdown to the estimates of visitor spending the Model generates estimates of total spending by the five business sectors. Visitor expenditure in each sector represents additional turnover for businesses in those sectors. However, evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover. In particular, some expenditure on food and drink actually takes place in inns and hotels that fall into the accommodation sector and at attractions. The turnover for each business sector has therefore been adjusted to take account of these marginal changes. More significantly, expenditure on travel costs associated with individual trips is as likely to take place at the origin of the trip as it is at the actual destination. It is therefore assumed that only 60% of total travel expenditure accrues to the destination area.

# North Somerset – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £30,286,000
- Overseas staying visitors £7,013,000



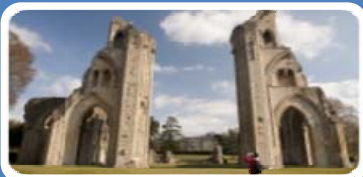
## Shopping

- UK staying visitors £9,416,000
- Overseas staying visitors £3,277,000
- Day visitors £56,360,000



## Food & drink

- UK staying visitors £18,458,000
- Overseas staying visitors £3,580,000
- Day visitors £125,511,000



## Attractions/entertainment

- UK staying visitors £7,833,000
- Overseas staying visitors £1,563,000
- Day visitors £28,901,000



## Travel

- UK staying visitors £15,093,000
- Overseas staying visitors £1,729,000
- Day visitors £56,204,000

## North Somerset – Other visitor related expenditure by category

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Second Homes

£281,000



Boats

£500,000



Visiting friends and relatives (non-visitor spend)

£9,344,000

- 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

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Having identified the value of turnover generated by visitor spending in each business sector it is possible to estimate the employment associated with that spending.

The use of visitor expenditure to generate job numbers underestimates the number of jobs arising in the attractions/entertainment sector. The underestimate arises because local authorities and voluntary bodies do not always seek to recoup the full operating costs of individual attractions or facilities from entrance charges. Therefore an additional percentage of direct employment is added to the attractions sector estimates to take account of this factor.

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

- **Direct Jobs** - Direct jobs are those in businesses in receipt of visitor spending. For example, jobs supported by visitor spending at a hotel would be direct jobs.
- **Indirect Jobs** - Indirect employment arises as a result of expenditure by businesses in direct receipt of visitor expenditure on the purchase of goods and services for their businesses. For example, some of the employment at a business supplying food and drink may be supported through the supplies that the business sells to hotels (or any other business in direct receipt of visitor expenditure).
- **Induced Jobs** - Induced jobs are those that are supported by the spending of wages by employees in direct and indirect jobs. Such spending will be spread across a wide range of service sectors.

Estimates are shown for actual jobs and full time equivalent jobs (FTE's).

# North Somerset – Tourism related employment

## Estimated actual employment



## Full time equivalent employment (FTE's)



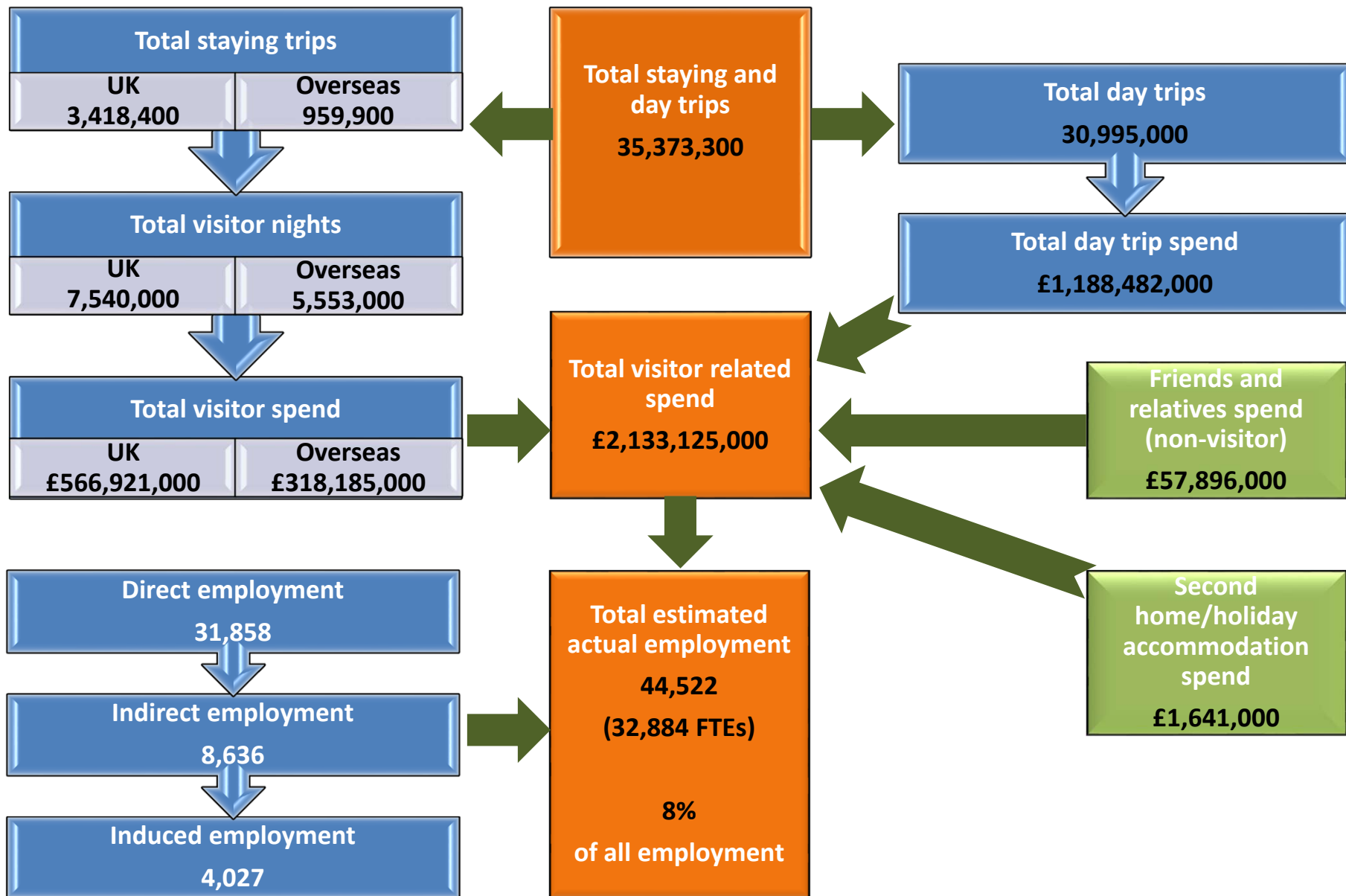
Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	504	33	<b>537</b>
Retailing	99	439	<b>538</b>
Catering	269	1,534	<b>1,803</b>
Attractions/entertainment	148	466	<b>614</b>
Transport	60	201	<b>261</b>
Arising from non trip spend	161	0	<b>161</b>
<b>Total Direct</b>	<b>1,240</b>	<b>2,673</b>	<b>3,913</b>



# West of England 2016



## West of England - Key facts at a glance





## West of England - Staying visits by accommodation type

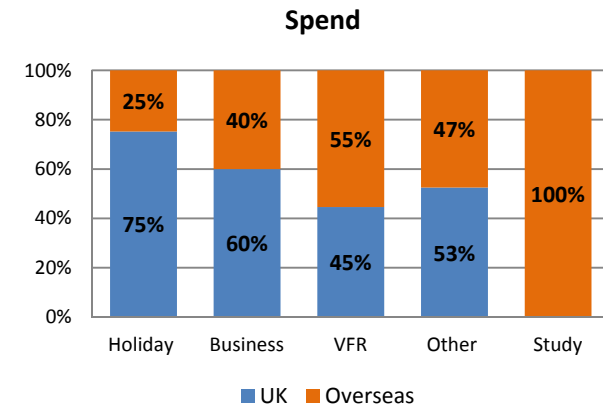
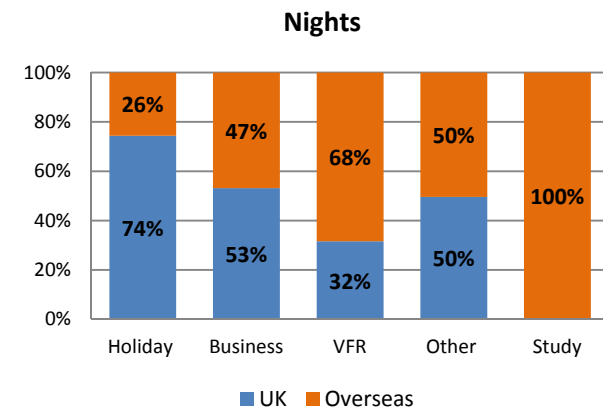
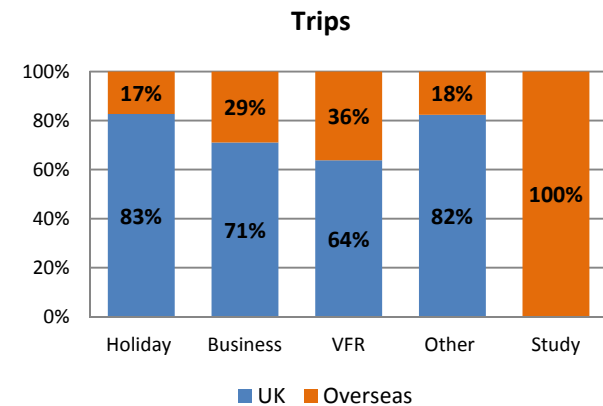
Domestic tourists	Trips	Nights	Spend
Serviced	1,774,600	3,246,000	£377,148,000
Self catering	230,100	811,000	£64,445,000
Touring caravans /tents	37,100	158,000	£5,822,000
Static vans/holiday centres	20,400	91,000	£3,680,000
Group/campus	88,000	225,000	£7,254,000
Paying guest in private homes	0	0	£0
Second homes	9,600	47,000	£981,000
Boat moorings	17,100	68,000	£3,597,000
Other	23,700	66,000	£6,220,000
Staying with friends and relatives	1,218,000	2,829,000	£97,775,000
<b>Total</b>	<b>3,418,400</b>	<b>7,540,000</b>	<b>£566,921,000</b>

Overseas tourists	Trips	Nights	Spend
Serviced	459,800	1,305,000	£137,693,000
Self catering	18,400	297,000	£13,167,000
Touring caravans /tents	2,694	14,000	£573,000
Static vans/holiday centres	200	1,000	£57,000
Group/campus	84,000	1,082,000	£60,663,000
Paying guest in private homes	34,200	520,000	£15,172,000
Second homes	2,600	27,000	£1,267,000
Boat moorings	0	0	£0
Other	81,600	196,000	£11,214,000
Staying with friends and relatives	276,200	2,109,000	£78,380,000
<b>Total</b>	<b>959,900</b>	<b>5,553,000</b>	<b>£318,185,000</b>

# West of England - Staying visits by purpose

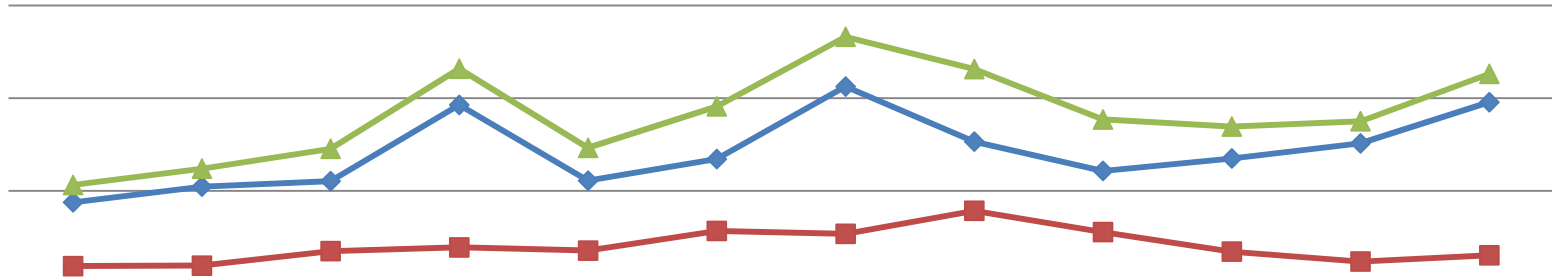
Domestic tourists	Trips	Nights	Spend
Holiday	2,497,400	5,664,000	£386,964,000
Business	477,700	1,084,000	£138,748,000
Visits to friends and relatives	369,100	666,000	£33,121,000
Other	75,100	124,000	£8,088,000
Study	0	0	£0
<b>Total</b>	<b>3,418,400</b>	<b>7,540,000</b>	<b>£566,921,000</b>

Overseas tourists	Trips	Nights	Spend
Holiday	523,200	1,954,000	£127,473,000
Business	194,800	956,000	£92,605,000
Visits to friends and relatives	209,500	1,443,000	£41,150,000
Other	16,100	126,000	£7,317,000
Study	17,000	1,074,000	£49,641,000
<b>Total</b>	<b>959,900</b>	<b>5,553,000</b>	<b>£318,185,000</b>



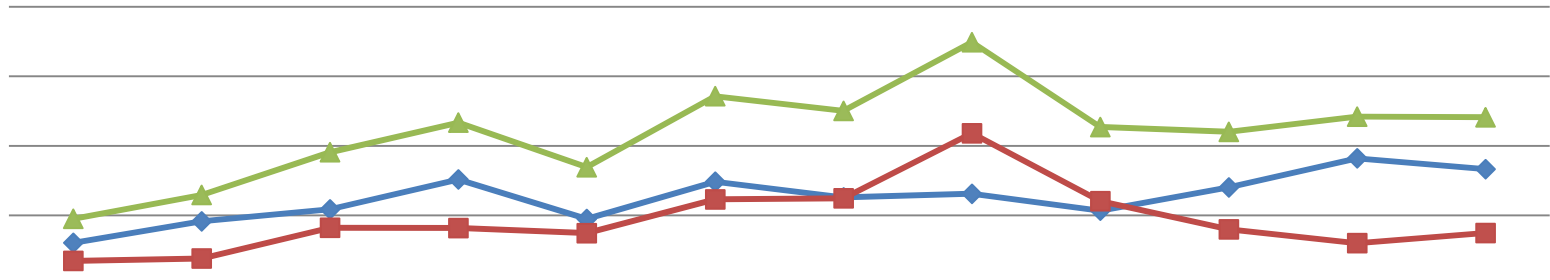
# West of England - Estimated seasonality of staying visits

### Seasonality - trips



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK trips (000's)	175.2	209.1	220.7	385.4	221.9	268.6	425.1	306.0	242.9	269.8	302.5	391.2
OS trips (000's)	37.5	38.6	69.8	77.9	70.9	113.4	107.1	156.8	110.9	68.7	47.4	60.8
Total trips (000's)	212.6	247.7	290.5	463.3	292.8	382.0	532.2	462.8	353.8	338.5	349.9	452.1

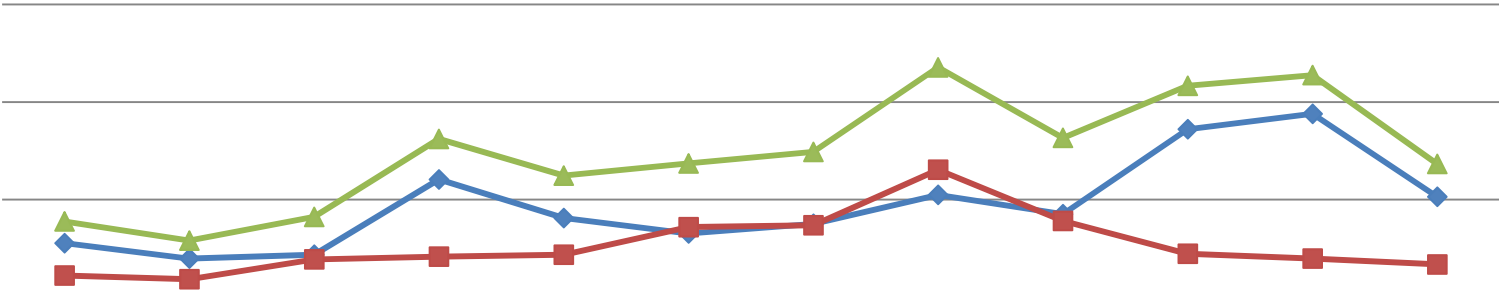
### Seasonality - nights



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK nights (000's)	302.3	457.2	543.3	758.4	474.4	742.3	629.3	655.1	533.6	701.4	910.1	832.6
OS nights (000's)	172.4	189.2	410.7	408.5	371.6	614.5	622.1	1090.3	601.9	399.4	299.7	372.9
Total nights (000's)	474.6	646.4	953.9	1166.9	846.0	1356.8	1251.4	1745.4	1135.4	1100.8	1209.8	1205.5

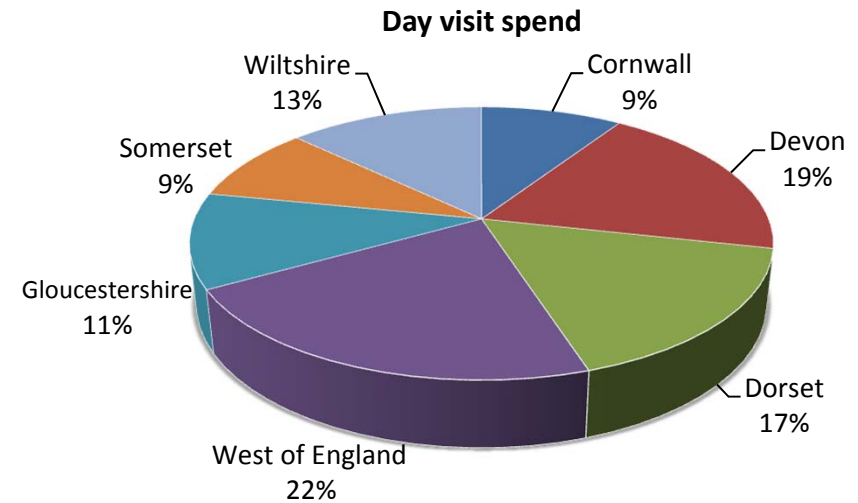
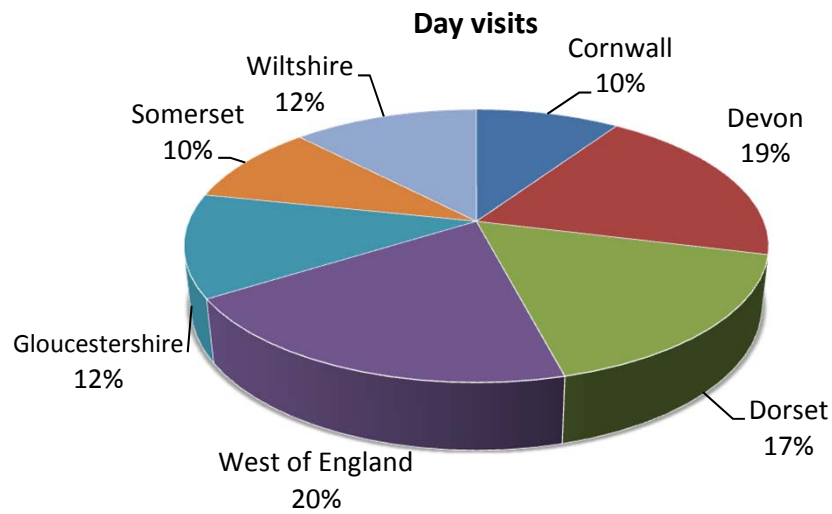
# West of England - Estimated seasonality of staying visits

Seasonality - spend



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
UK spend (mn's)	27.7	19.8	21.8	60.4	40.6	32.6	37.6	52.4	42.5	86.1	94.0	51.4
OS spend (mn's)	11.1	9.2	19.4	20.8	21.7	35.9	36.8	65.3	39.1	22.3	19.8	16.8
Total spend (mn's)	38.8	29.0	41.1	81.1	62.3	68.5	74.4	117.8	81.6	108.3	113.8	68.3

## West of England - Day visits in the regional context

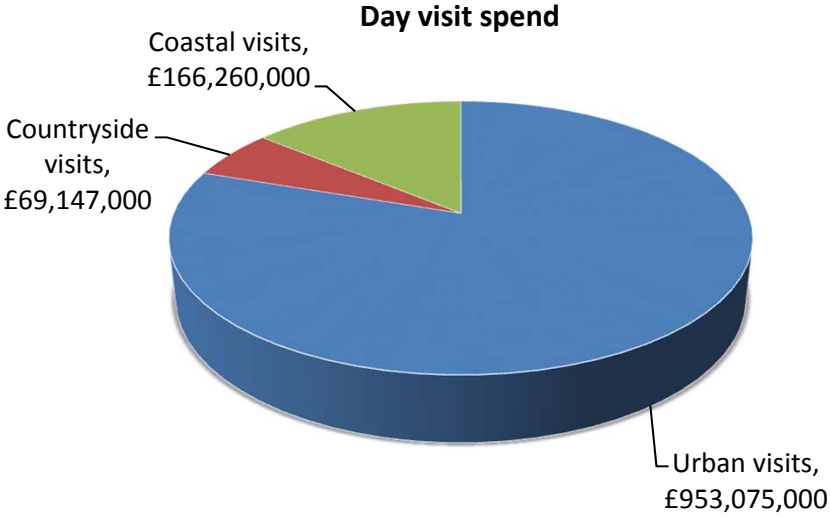
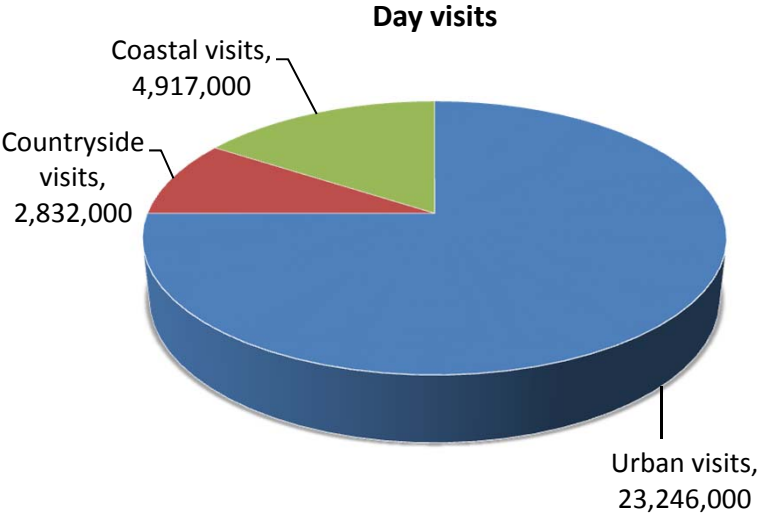


Area	Day visits (millions)	Day visit spend (millions)
Cornwall	14.5	£505.5
Devon	29.9	£1,041.2
Dorset	26.2	£899.8
West of England	31.0	£1,188.5
Gloucestershire	18.8	£613.4
Somerset	14.6	£487.9
Wiltshire	18.8	£700.8



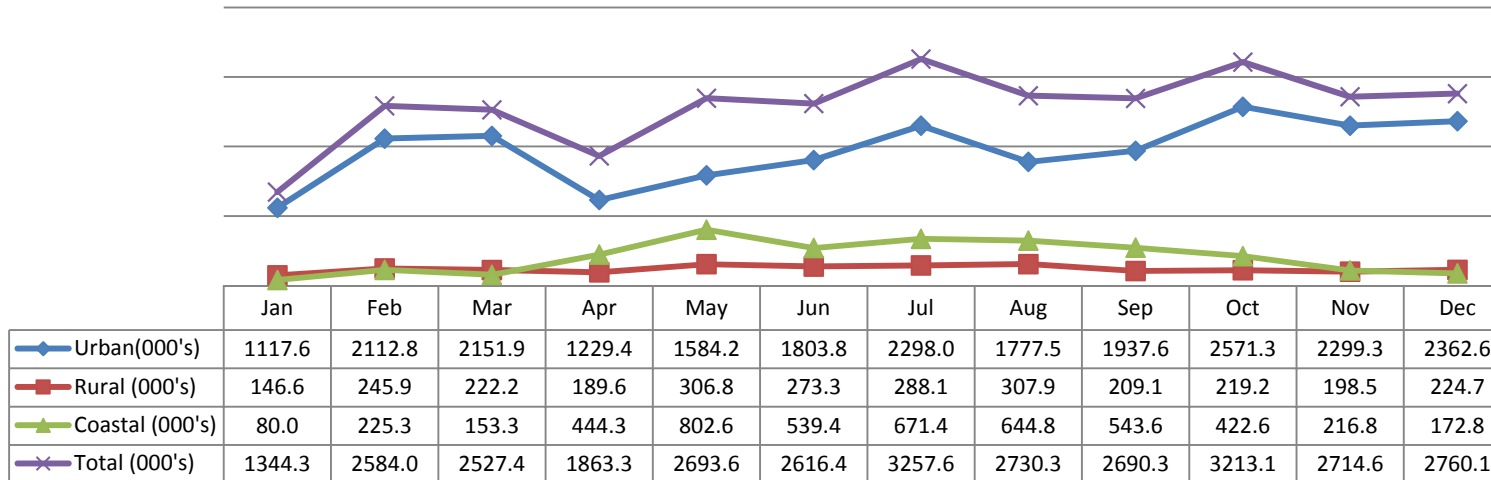
# West of England - Day visits by location

Total day visits	Total day visit spend
30,995,000	£1,188,482,000

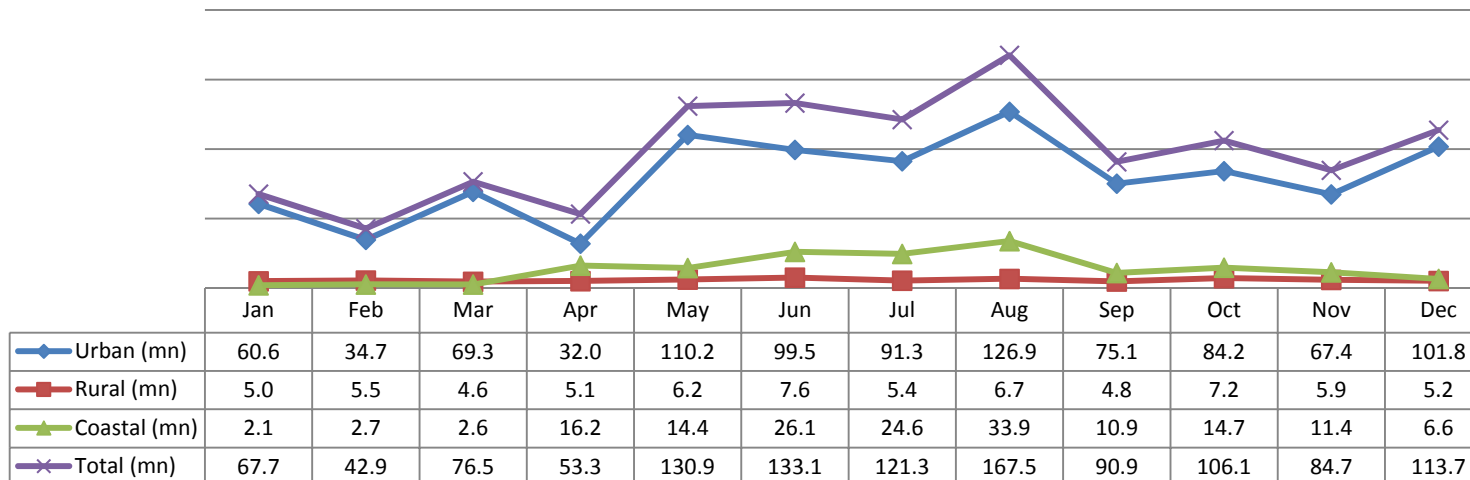


# West of England - Estimated seasonality of day visits

Seasonality - day visits (000's)

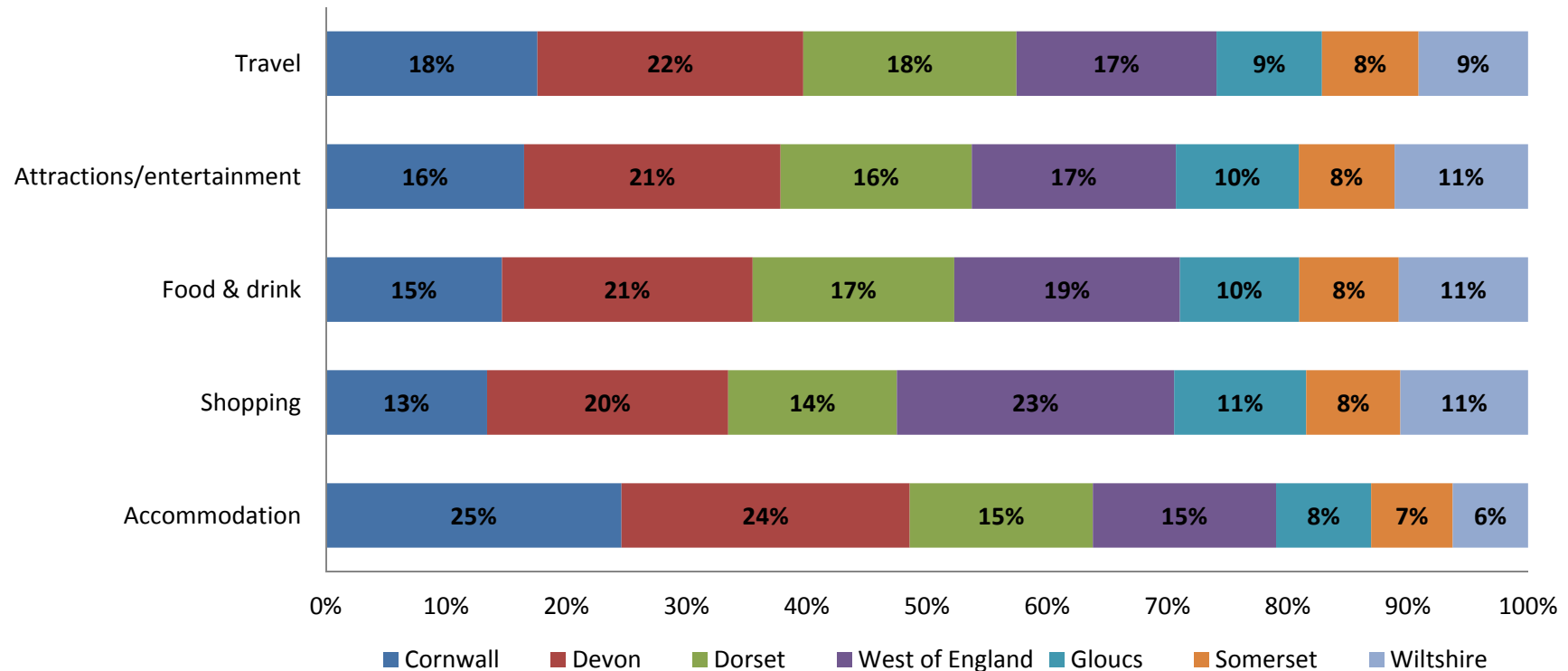


Seasonality - day visit spend (millions)



## West of England – Direct visitor expenditure by category in the regional context

South West	Accommodation	Shopping	Food & drink	Attractions/entertainment	Travel	TOTAL
Spend	£2,112,122,000	£2,588,442,000	£3,545,168,000	£1,238,842,000	£1,672,977,000	£11,157,550,000
%	19%	23%	32%	11%	15%	100%



# West of England – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £214,452,000
- Overseas staying visitors £107,686,000



## Shopping

- UK staying visitors £66,032,000
- Overseas staying visitors £81,988,000
- Day visitors £449,079,000



## Food & drink

- UK staying visitors £127,910,000
- Overseas staying visitors £65,513,000
- Day visitors £472,253,000



## Attractions/entertainment

- UK staying visitors £54,917,000
- Overseas staying visitors £33,630,000
- Day visitors £121,799,000



## Travel

- UK staying visitors £103,610,000
- Overseas staying visitors £29,368,000
- Day visitors £145,350,000

## West of England – Other visitor related expenditure by category

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Second Homes

£641,000



Boats

£1,000,000



Visiting friends and relatives (non-visitor spend)

£57,896,000

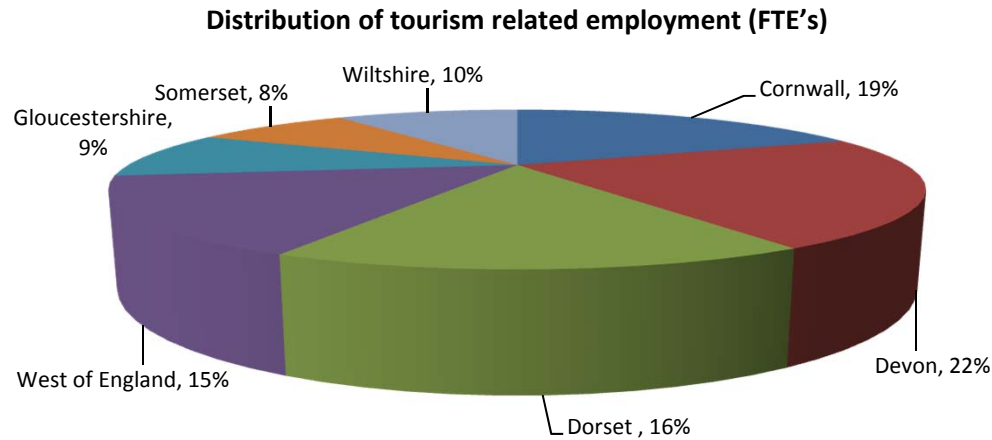
- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover berthing charges, servicing and maintenance and upgrading of equipment.
- Additional spending is incurred by friends and relatives as a result of people coming to stay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

## West of England – Business turnover

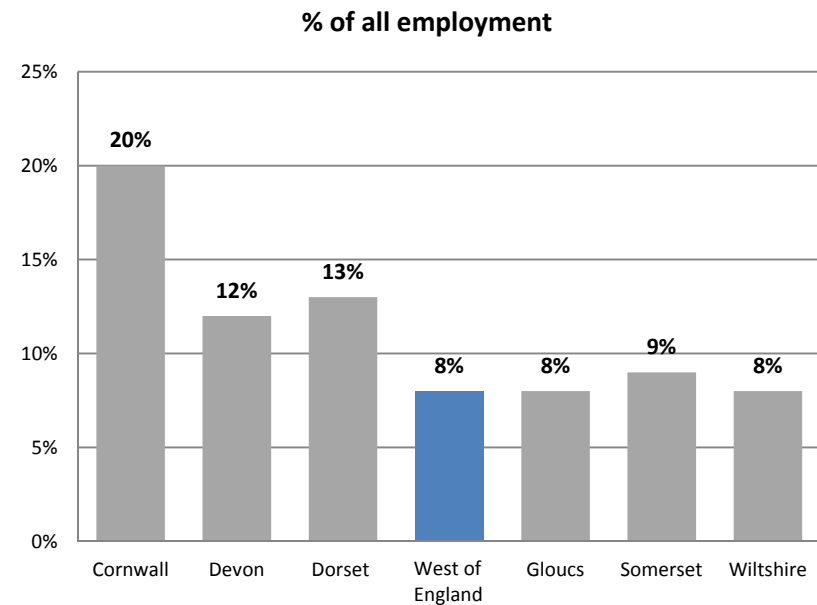
Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£326,004,000	£9,445,000	<b>£335,449,000</b>
Retailing	£146,540,000	£444,588,000	<b>£591,128,000</b>
Catering	£187,621,000	£458,084,000	<b>£645,705,000</b>
Attractions/entertainment	£91,960,000	£131,012,000	<b>£222,972,000</b>
Transport	£79,787,000	£87,211,000	<b>£166,998,000</b>
Arising from non trip spend	£59,537,000	£0	<b>£59,537,000</b>
<b>Total Direct</b>	<b>£891,449,000</b>	<b>£1,130,340,000</b>	<b>£2,021,789,000</b>

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£891,449,000	£1,130,340,000	<b>£2,021,789,000</b>
Supplier and income induced	£371,378,000	£328,440,000	<b>£699,818,000</b>
<b>Total</b>	<b>£1,262,827,000</b>	<b>£1,458,780,000</b>	<b>£2,721,607,000</b>

# West of England – Tourism related employment in the regional context



Area	Number of FTE's
Cornwall	40,386
Devon	47,284
Dorset	34,223
West of England	32,884
Gloucestershire	19,991
Somerset	17,317
Wiltshire	20,655



# West of England – 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	4,202	121	<b>4,323</b>
Retailing	1,114	3,343	<b>4,457</b>
Catering	2,283	5,552	<b>7,835</b>
Attractions/entertainment	1,347	1,908	<b>3,255</b>
Transport	458	502	<b>961</b>
Arising from non trip spend	945	0	<b>945</b>
<b>Total Direct</b>	<b>10,350</b>	<b>11,426</b>	<b>21,776</b>