

1 CURRENT VISITORS AND ECONOMIC IMPACT

This section of the report provides an overview of the scale and nature of tourism in the region.

It is written in the form of a commentary designed to bring out the main headlines and key features, with more detailed information provided in supporting tables and charts. Further sources of information are highlighted where appropriate.

The figures relate to 2001, which was an unusual year because of the Foot and Mouth outbreak. We comment on the impacts of this at a regional level later in this section.

The data presented in the section is based mainly upon information from the national tourism surveys of UKTS, IPS and UKDVS. Some of this is new data not previously published before. Sample sizes mean that some of the figures need to be treated with caution.

Note: All SW figures in this report relate to the boundaries of the government region (RDA) of the South West unless stated otherwise (ie Cornwall, Devon, Dorset, Somerset, Wiltshire, Gloucestershire, plus the unitary authorities of Bath and NE Somerset, Bristol, North Somerset, South Gloucestershire, Bournemouth and Poole).

1.1 Regional overview

The main dimensions of tourism in the South West are presented in tables 1.1 to 1.4

In 2001, some 26m tourists stayed overnight in the South West from both the UK and overseas. Together these visitors stayed for 105m nights and spent a total of £4.5bn during their visit.

In terms of domestic tourism the SW is the most visited government (RDA) region of the UK. If overseas visits are taken into account then it is exceeded only by London and the South East. The region attracts significantly more visitors than Scotland and twice as many visitors as Wales.

Some key facts are set out below although it needs to be borne in mind that there is significant variation in the incidence and type of tourism across the region.

- The South West accounts for 15% of UK domestic tourism trips and domestic tourism spending. In terms of overseas tourism the region accounts for 8% of UK visits and 6% of overseas spending.
- Most visitors are from the UK with only 7% coming from overseas. Overseas visitors however account for 14% of tourism spending because they tend to stay longer.

- Average spend per night is similar for UK visitors (£43) and overseas visitors (£42) but overseas visitors tend to stay much longer, 7.9 nights on average as opposed to 3.7 nights.
- The majority of visitors are on holiday, accounting for 71% of domestic and 40% of overseas trips. Visits to friends and relatives account for 19% of domestic visits and nearly one third (31%) of overseas visits. Business visits account for 10% of domestic trips.
- Devon is the most visited county accounting for 30% of the region's domestic trips and 20% of overseas visits. This is followed by Cornwall and Dorset. Note that Devon and Cornwall together account for half of all trips and tourism spend in the region.

TABLE 1.1 Volume and value of tourism

	Trips (m)	Nights (m)	Spend (m)
SW region			
Domestic	24.0	89.9	3889
Overseas	1.9	15.0	635
Total SW	25.9	104.9	4524
UK as a whole			
Domestic	163.1	529.6	26095
Overseas	22.8	189.5	11306
Total UK	185.9	719.1	37401

Source: UKTS, IPS 2001

TABLE 1.2 Tourism by UK residents in SW

	Trips (m)	Nights (m)	Spend (£m)
Holiday	17.0	71.6	2992
Visits to friends and relatives	4.5	10.8	362
Work/business	2.3	6.7	485
Total	24.0	89.9	3889

Source: UKTS 2001

TABLE 1.3 Tourism by overseas residents in SW

	Trips (m)	Nights (m)	Spend (£m)
Holiday	0.78	4.55	184
Visits to friends and relatives	0.60	4.71	149
Work/business	0.37	2.17	161
Total	1.93	15.0	634

Source: IPS 2001

TABLE 1.4 Distribution of tourism (domestic plus overseas)

	Trips (m)	Nights (m)	Spend (£m)	% overseas trips
Cornwall	5.0	24.0	1035	4%
Devon	7.8	32.3	1312	5%
Somerset	3.1	10.7	458	6%
Wiltshire	1.7	5.0	266	10%
Dorset	4.0	15.7	664	6%
Gloucestershire	1.8	6.2	267	10%
Former Avon	3.0	10.6	522	19%

Source: UKTS, IPS 2001

1.2 Tourism trends

Measurement of tourism trends in the region is complicated by changes in methodology to the UKTS survey in 2000. To enable comparisons with current figures, previous years' data has been reformulated but this information is only available for the old regional boundary. Nevertheless, the trends are likely to hold good for the wider region. (Table 1.5)

Overseas tourism to the region has followed the national trend. From 1996- 2000 it remained fairly static but fell by 16% in 2001 in response to FMD and September 11.

Domestic tourism has also followed the national trend for England as a whole with a 12% increase in trips over the period 1996-2001. Within this overall picture there have been fluctuations from year to year.

Within this period:

- Short holiday trips have grown by 48%
- Long holidays have fallen by 14%
- VFR has shown a significant increase in recent years (this might be due to changes in survey methodology)
- Business tourism has remained broadly static

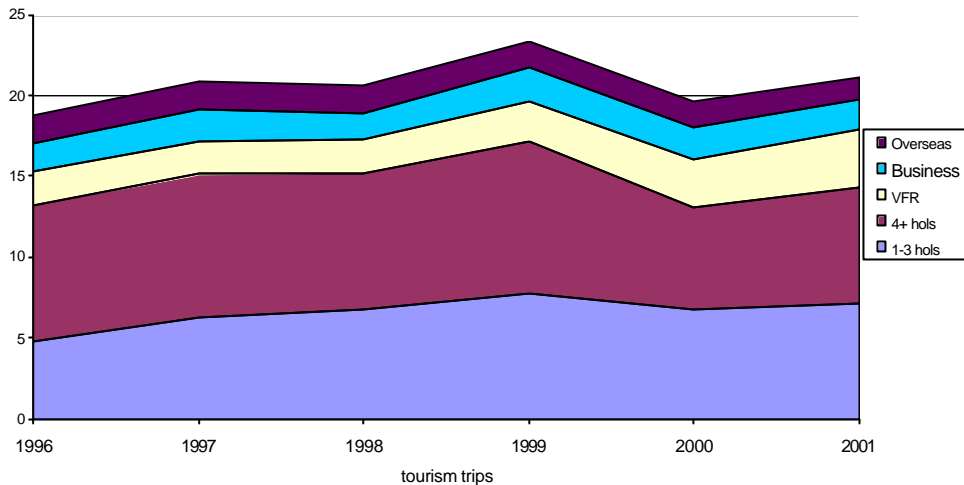
TABLE 1.5 Tourism trips to SW* 1996-2001

	1996 (m)	1997 (m)	1998 (m)	1999 (m)	2000 (m)	2001 (m)
1-3 hols	4.8	6.2	6.7	7.7	6.7	7.1
4+hols	8.4	8.9	8.5	9.4	6.4	7.2
VFR	2.1	2.1	2.1	2.5	2.9	3.6
Business	1.7	1.9	1.6	2.1	2.0	1.8
All tourism	17.5	19.5	19.5	22.3	18.6	19.8
Overseas	1.7	1.7	1.7	1.6	1.6	1.4

Source: IPS, UKTS/ETC. Figures adjusted for changes in survey methodology

*NB these figures are only available for the old regional tourist board boundary which excluded Gloucestershire and eastern Dorset.

Fig 1.1 Trends in tourism in SW (former region)



1.3 Sub-regional differences

There is significant variation across the region in terms of the scale and type of tourism. The section below highlights some of the differences by providing a brief snapshot of tourism in each of the counties based on the 2001 figures.

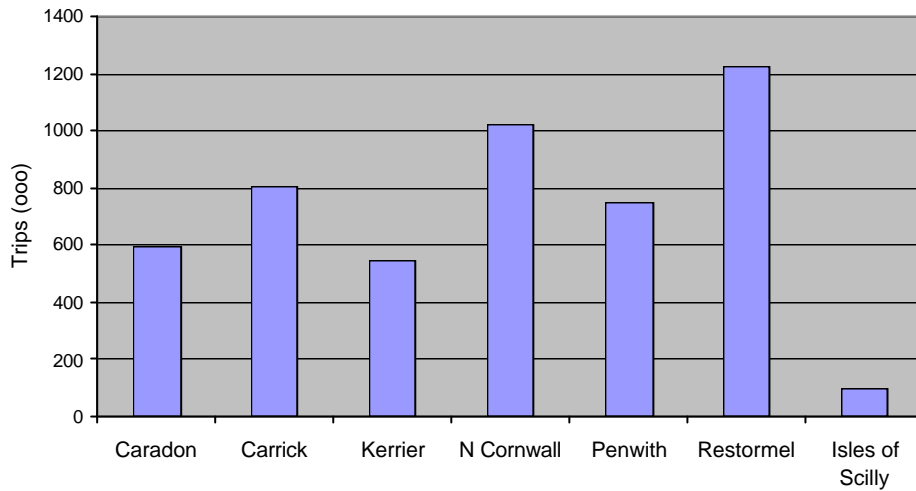
Cornwall

Compared to the regional average Cornwall has low levels of business and overseas tourism but a very high dependence on holiday visitors, especially long holidays. Long holidays are hugely important to Cornwall accounting for 2/3 of domestic nights and spending. The short holiday sector is relatively small reflecting the relative isolation of the county from centres of population. Average trip duration and spend per trip is relatively high reflecting the dominance of the long holiday sector. Spend per night, however, is at the regional average.

TABLE 1.6 Cornwall tourism profile

	Cornwall			SW Region
	Trips	nights	Spend	Trips
Domestic	4.8	22.7	980	24.0
Short hols	25%	11%	18%	37%
Long hols	48%	70%	66%	34%
VFR	21%	12%	9%	19%
Business	4%	7%	7%	10%
Overseas	0.20	1.5	55	1.9
Total	5.0	24.2	1035	25.9
Average stay	4.8 nights			4.1
Spend per trip	£206			£173
Spend per night	£43			£43

Fig 1.2 Cornwall - Staying visits by District



In terms of the distribution within the county, the districts with the largest concentrations of staying tourism are Restormel and North Cornwall. Together these districts account for 44% of Cornwall's tourism. (See Fig 1.2. Figures taken from SW Tourism Economic Impact Study GBA, 2003).

Devon

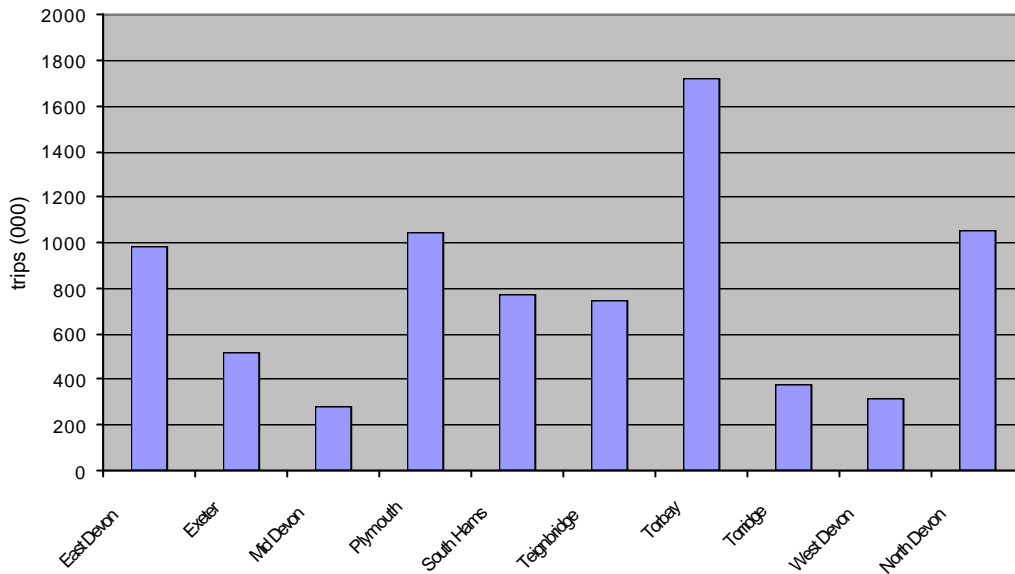
Devon accounts for almost a third of the region's tourism. Holiday tourism predominates, accounting for 80% of tourism spending, but compared to Cornwall there is more of a balance between long and short holidays. Compared to the region as a whole Devon attracts a smaller proportion of overseas visitors and VFR. Spend per night is just below the regional average.

TABLE 1.7 Devon tourism profile

	Devon			SW Region
	Trips	Nights	Spend	Trips
Domestic	7.4	28.8	1181	24.0
Short hols	34%	17%	23%	37%
Long hols	42%	67%	58%	34%
VFR	14%	8%	8%	19%
Business	9%	7%	9%	10%
Overseas	0.39	3.5	131	1.9
Total	7.8	32.3	1312	25.9
Average stay	4.1 nights			4.1
Spend per trip	£167			£173
Spend per night	£40			£43

Source: UKTS, IPS 2001

Fig 1.3 Devon - Staying visitors by district



In terms of the distribution within the County, Torbay attracts the most staying visitors with 1.7m trips. North Devon and Plymouth attract over 1m staying visitors a year. The least visited districts in terms of staying visitors are Mid Devon and West Devon. (See Fig 1.3. Figures taken from SW Tourism Economic Impact Study GBA, 2003).

Somerset

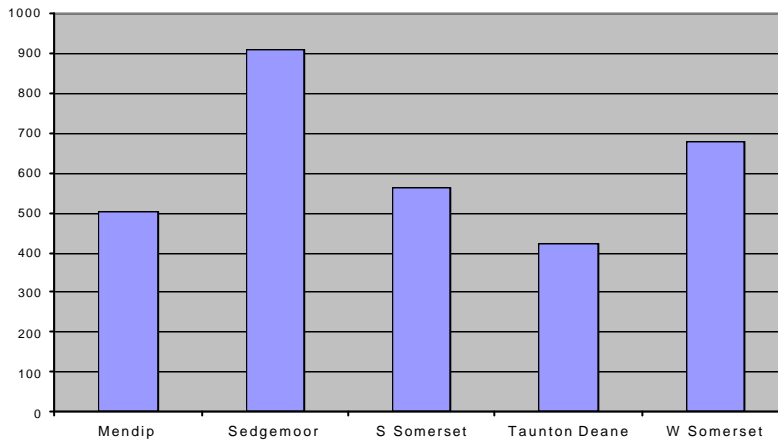
Somerset accounts for 12% of the region's tourism. Holiday tourism predominates although it is marginally less important than in Devon and Cornwall and short holiday trips outnumber long holiday trips. This is reflected in a shorter than average length of stay. Spend per night is similar to the regional average. The county attracts a higher than average share of overseas visitors.

TABLE 1.8 Somerset tourism profile

	Somerset			SW Region
	Trips	Nights	Spend	Trips
Domestic	2.9	9.7	416	24.0
Short hols	41%	25%	32%	37%
Long hols	31%	54%	40%	34%
VFR	17%	10%	11%	19%
Business	10%	7%	14%	10%
Overseas	0.17	1.0	42	1.9
Total	3.1	10.7	458	25.9
Average stay	3.5 nights			4.1
Spend per trip	£147			£173
Spend per night	£42			£43

Source: UKTS, IPS 2001

Fig 1.4 Somerset - Staying visits by district



The biggest district in terms of staying visitors is Sedgemoor which attracted an estimated 0.9m staying visits in 2001. (See Fig 1.4. Figures taken from SW Tourism Economic Impact Study GBA, 2003).

Gloucestershire

Gloucestershire accounts for a relatively low proportion (7%) of the region's tourism. Holiday tourism is still the most important type of tourism to the county but it is dominated by short holidays which account for twice as many trips as long holidays. This is reflected in the average length of stay. Gloucestershire attracts high levels of business tourism (twice the regional average) and higher levels of overseas visitors. Tourism spend is average for the region.

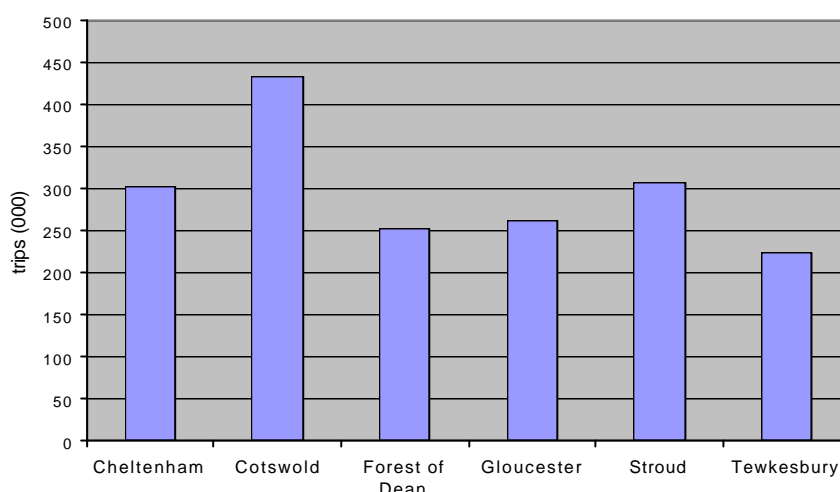
TABLE 1.9 Gloucestershire tourism profile

				SW Region
	Trips	Nights	spend	Trips
Domestic	1.6	5.1	217	24.0
Short hols	43%	25%	31%	37%
Long hols	19%	39%	24%	34%
VFR	19%	16%	13%	19%
Business	19%	18%	28%	10%
Overseas	0.18	1.0	50	1.9
Total	1.8	6.1	267	25.9
Average stay	3.4 nights			4.1
Spend per trip	£147			£173
Spend per night	£43			£43

Source: UKTS, IPS 2001

Tourism in Gloucestershire is relatively evenly distributed between the districts. Cotswold attracts the most staying visitors with an estimated 430,000 visits in 2001. (See Fig 1.5. Figures taken from SW Tourism Economic Impact Study GBA, 2003).

Fig 1.5 Gloucestershire - Staying visitors by district



Wiltshire

Wiltshire accounts for a relatively small share of the region's tourism (7%). The picture is not dissimilar from Gloucestershire, with the holiday sector dominated by short breaks, and higher levels than average of overseas and business visitors. Average length of stay is very short whilst average spend appears to be much higher than for the region as a whole. It is not clear why this should be so high and it may be due to unreliable data.

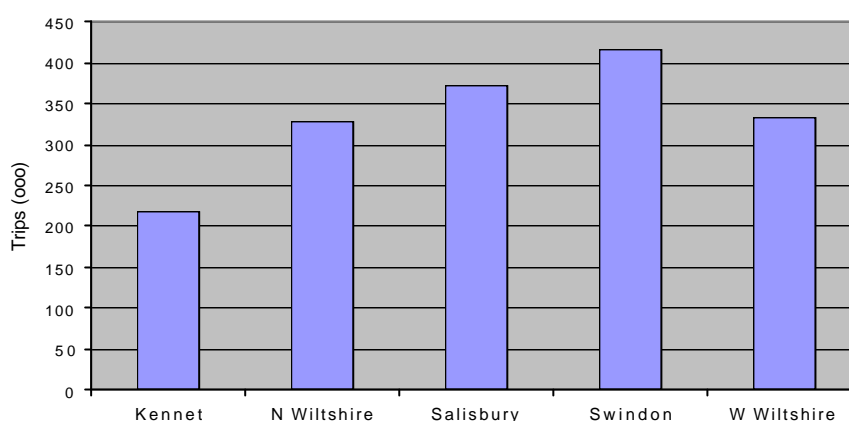
TABLE 1.10 Wiltshire tourism profile

	Wiltshire			SW Region
	Trips	Nights	Spend	Trips
Domestic	1.5	4.1	218	24.0
Short hols	40%	32%	47%	37%
Long hols	20%	41%	21%	34%
VFR	20%	20%	12%	19%
Business	13%	10%	21%	10%
Overseas	0.16	0.9	48	1.9
Total	1.7	5.0	266	25.8
Average stay	2.9 nights			4.1
Spend per trip	£156			£173
Spend per night	£53			£43

Source: UKTS, IPS 2001

Swindon attracted the most staying visitors in 2001 with an estimated 410,000 staying visitors. The other districts are pretty much on a par. (See Fig 1.6. Figures taken from SW Tourism Economic Impact Study GBA, 2003).

Fig 1.6 Wiltshire - Staying visits by district



Dorset

Dorset accounts for 17% of the region's tourism. Holidays predominate and are broadly split between short and long holidays with the former just outnumbering the latter. VFR stands at just below the regional average as does business tourism and overseas visits. Length of stay is below the regional average as is spend

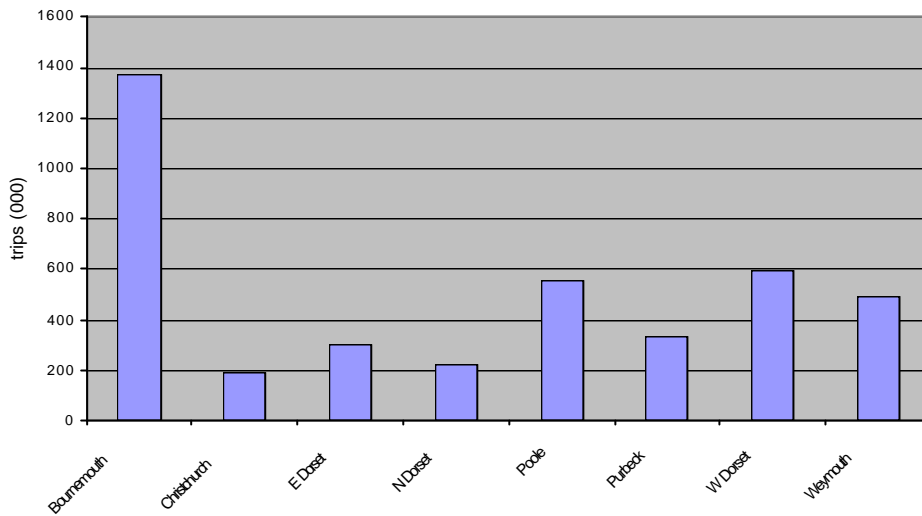
TABLE 1.11 Dorset tourism profile

	Dorset			SW Region
	Trips	Nights	Spend	Trips
Domestic	3.8	12,9	530	24.0
Short hols	37%	23%	32%	37%
Long hols	32%	58%	44%	34%
VFR	17%	13%	6%	19%
Business	7%	5%	18%	10%
Overseas	0.26	2.8	134	1.9
Total	4.1	15.7	664	25.9
Average stay	3.7 nights			4.1
Spend per trip	£156			£173
Spend per night	£43			£43

Source: UKTS, IPS 2001

Bournemouth dominates tourism in Dorset with an estimated 1.4m nights. West Dorset, Weymouth and Poole all receive 0.5m or more staying visits. The least visited districts are Christchurch and N Dorset. (See Fig 1.7. Figures taken from SW Tourism Economic Impact Study GBA, 2003).

Fig 1.7 Dorset - Staying visitors by district



Former Avon

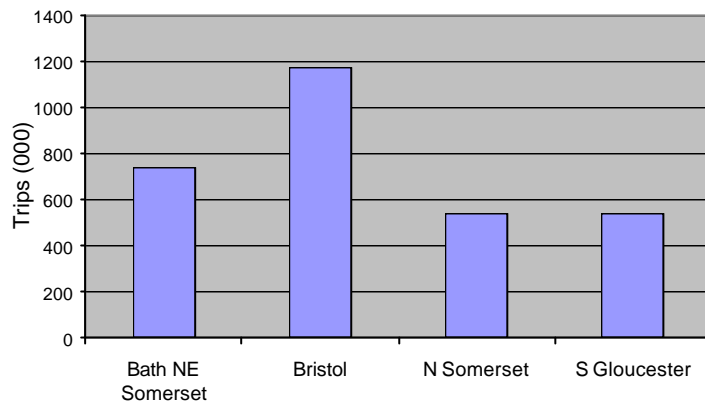
The unitary authorities which made up the former County of Avon account for about 10% of the region's tourism. There are nearly three times as many short holidays as long holidays in this area. VFR is above average, reflecting the large resident population, and there are also above average levels of business tourism and overseas visits. Average length of stay is quite short and spend per night is high.

TABLE 1.12 Former Avon tourism profile

	Former Avon			SW Region
	Trips	Nights	Spend	Trips
Domestic	2.4	6.4	347	24.0
Short hols	46%	33%	46%	37%
Long hols	17%	36%	24%	34%
VFR	25%	23%	13%	19%
Business	12%	8%	16%	10%
Overseas	0.57	4.2	175	1.9
Total	3.0	10.6	522	25.9
Average stay	3.5 nights			4.1
Spend per trip	£172			£173
Spend per night	£49			£43

Source: UKTS, IPS 2001

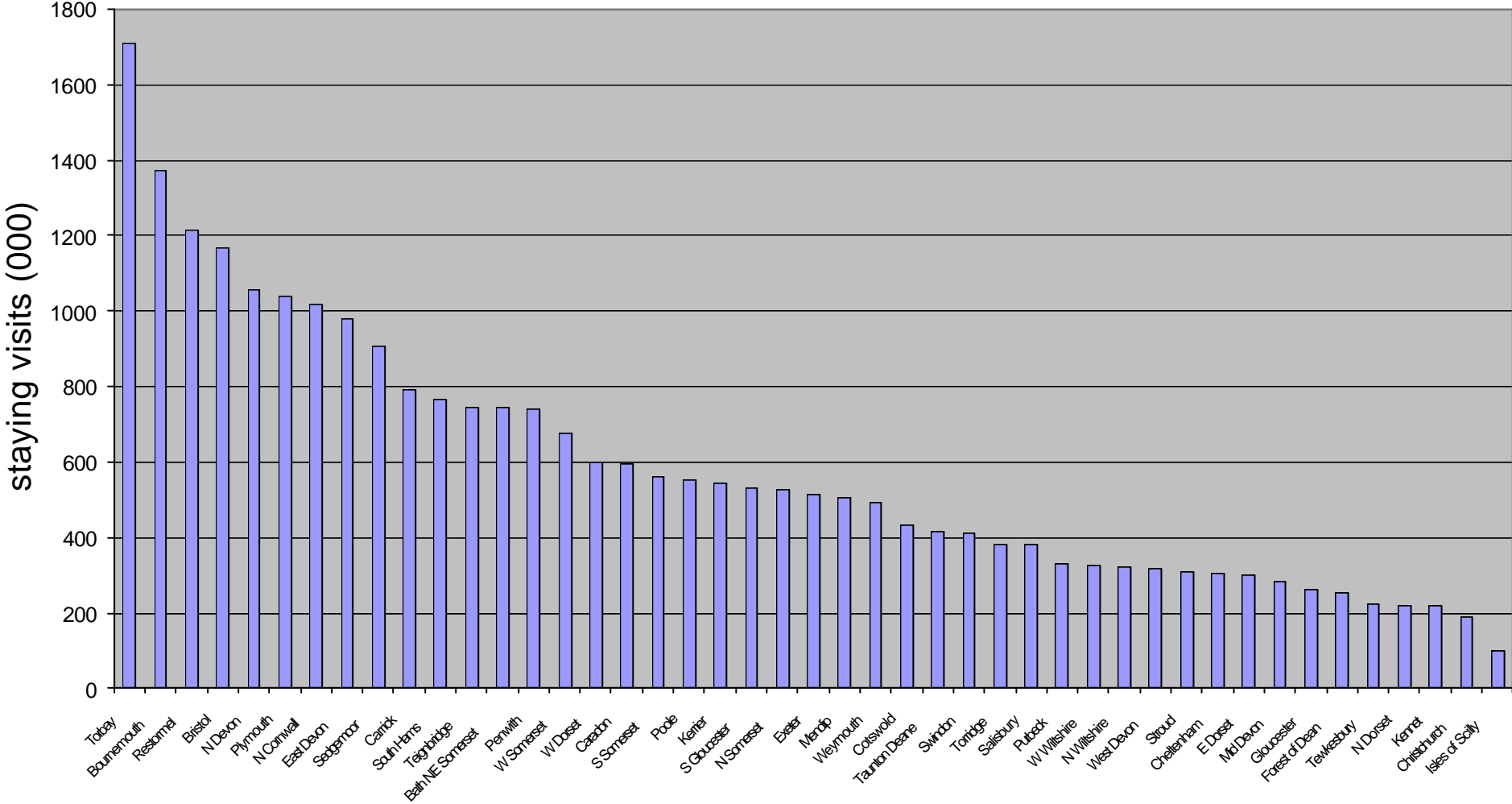
Fig 1.8 Former Avon - Staying visitors by district



Bristol dominates staying tourism in Avon with an estimated 1.17m visits in 2001. Bath and NE Somerset attracted an estimated 743,000 staying visits. See Fig 1.8. Figures taken from SW Tourism Economic Impact Study GBA, 2003).

Figure 1.9 shows the pattern of the variation in the number of staying visitors received by all the districts in the SW. There are seven districts with more than 1m staying visitors, with Torbay in the lead followed by Bournemouth. Four of the top seven are resorts and two are major cities - Bristol and Plymouth.

Fig 1.9 Staying visitors by district 2001



1.4 Market sector profiles

The following section explores some of the main market sectors in more detail at a regional level, drawing on the UKTS and IPS information. All data refer to the SWRDA region unless otherwise indicated. Domestic markets are examined first followed by overseas visitors. More detailed figures are given in the accompanying table.

Business tourism

Business visits account for 9% of all domestic tourism trips to the region and 13% of domestic tourism spend. Most business visitors to the Region are on general business trips, visiting customers or business contacts etc. Conference and exhibition visits, a subset of business tourism, accounts for about 10% of the region's business trips.

TABLE 1.13 Business trips in SW

2001	
Trips	2.3
Nights	6.7
Spend	£485m
Duration	2.9 nights
Spend per trip	£211
Spend per night	£73

Characteristics of business trips

- Higher than average spend
- Short duration, the average duration is 2.9 nights and half of all trips are for one night only
- Almost a third take place in Devon, the rest are fairly evenly spread around the sub-regions
- Primarily car-borne trips (72%) although 12% arrive by train and 3% by plane
- Most use hotels (59%) with a further 10% making use of B+B accommodation. A significant minority (11%) stay with friends and relatives.
- Low points tend to correspond with school holiday periods
- Business visitors spend the majority of their budget on accommodation (£129m). Travel and eating/drinking both account for a further £71m).
- Half of all business trips take place in cities or large towns. The rest are spread evenly across resorts, countryside and small towns.

The business visitor

- The majority (78%) of business visitors are male and the biggest age group is 35-44. Nearly three quarters of business visitors are aged 25-54. 73% are married.
- Business visitors are up-market. The majority (72%) are classified as ABC1 with an equal split between AB and C1.
- 22% come from within the SW region with a further 26% coming from London/SE

- Almost all are in full-time work (91%)
- Over a quarter (29%) have a household income of £20-40,000 pa and a further quarter have a household income of £40-60,000
- 91% are car owners

Visits to friends and relatives

VFR trips (where visiting friends/relatives is the main purpose of the trip) account for 19% of the region's tourism trips but only 9% of total spend because of the relatively low spend on accommodation and meals.

TABLE 1.14 VFR trips in SW

2001	
Trips	4.5m
Nights	10.8m
Spend	£362m
Duration	2.4 nights
Spend per trip	£80
Spend per night	£33

Characteristics of VFR trips

- Low spend per night
- Primarily short duration, 85% 1-3 nights
- Uneven pattern not particularly related to resident population with high levels of VFR tourism in Cornwall and Devon, low in Wiltshire and Gloucestershire
- High use of car, accounting for 79% of trips
- Most stay with friends and relatives but some use commercial accommodation
- Even distribution of trips throughout the year with peak at Christmas
- Trips self-arranged and not pre-booked
- A third of trips made by people travelling alone
- Even spread across destination type, 56% take place in urban areas.

The VFR tourist

- Two thirds are female
- Fairly evenly spread across the age groups but higher propensity for younger age groups to travel
- 58% are ABC1
- Half come from SW and SE regions
- 58% have household income of less than £40k probably reflecting the young age profile

Short holidays

Short holidays are defined here as holidays or breaks with 1-3 nights away from home. They account for 37% of all domestic tourism trips to the SW but only 20% of nights and 28% of spending. Short holiday trips outnumber long holiday trips.

TABLE 1.15 Short holiday trips in SW

2001	
Trips	8.8m
Nights	17.6m
Spend	£1079m
Duration	2.0 nights
Spend per trip	£123
Spend per night	£61

Characteristics of short holidays

- High spending holiday makers but short duration
- Devon accounts for 28% but rest more evenly spread throughout the region
- Strongly car based, some use of train
- Almost half stay with friends and relatives. Hotels are the most common form of commercial accommodation used (26%).
- Bias towards the summer with 58% of trips in AMJJAS
- Limited pre-booking, reflects numbers staying with friends and relatives. 12 % used internet for information.
- More likely to be adult only groups
- Seaside is most popular location (35%) but countryside and larger towns also visited
- Strong likelihood of additional/secondary

The short holiday visitor

- Equal split between men and women
- Younger than holidaymakers in general. Half (47%) are aged 25-44.
- Less likely to be married than holiday makers in general
- More up-market, two thirds are ABC1
- Come from nearer at hand than holidaymakers as a whole - 61% from SW, London, SE
- Two thirds are working
- More affluent than holiday makers as a whole.
- High car ownership (93%)
- One third have children at home

Long holidays

Long holidays, defined here as holidays involving 4 or more night away from home, account for 34% of all domestic tourism trips in the SW but 60% of nights and 49% of spending.

TABLE 1.16 Long holiday trips in SW

2001	
Trips	8.2m
Nights	54.0m
Spend	£1913m
Duration	6.6 nights
Spend per trip	£233
Spend per night	£35

Characteristics of SW long holiday trips

- Strong bias towards Devon and Cornwall (63%). Few long holidays in Wiltshire, Gloucestershire and former Avon.
- Slightly less likely than short breakers to come by car. 20% come by some form of public transport.
- Over a quarter (28%) stay with friends/relatives. Self catering accommodation twice as likely to be used as serviced.
- High degree of concentration with 26% of trips in August and over half (55%) taking place in JAS.
- 61% pre-book, 13% use internet as a source of information
- A quarter of all long holidays last for more than a week.
- Half consist of adult only parties. Children are present in 43% of long holidays
- Half (53%) of all trips take place at the seaside and a further quarter in the countryside.
- Two thirds (63%) are people's main holiday.

The long holiday visitor

- More likely to be female (60%)
- More likely to be families and older age groups
- 72% are married
- More even spread across social classes but 54% ABC1.
- Come from further afield but majority (69%) from southern half of England
- Lower car ownership than short breakers
- Slightly higher proportion have children, 41% are families
- 40% are over 55, but only 8% are 16-34

Overseas visitors

The SW region attracted an estimated 1.9m overseas visitors in 2001. Overseas visitors account for 7% of total tourism trips to the region but 14% of nights and spend. Less detail is available on the make-up and characteristics of overseas visits.

TABLE 1.17 Overseas trips to SW

2001	
Trips	1.9m
Nights	15.1m
Spend	£634m
Duration	7.9 nights
Spend per trip	£330
Spend per night	£42

Characteristics of overseas visits

- A high average length of stay
- Spend per night is less than domestic visitors
- Devon and Avon attract the most overseas visitors, around twice as many as Cornwall, Gloucestershire and Wiltshire.
- 20% of overseas visitors come from N America. The bulk of the rest come from continental Europe

- The USA, France, Germany, Ireland account for one half of all visitors.
- Holiday is the main trip purpose but 58% of visits are for other purposes such as VFR, business and study
- Two thirds of overseas visitors arrive by air, 44% through Heathrow and Gatwick
- Over a third of all overseas visitors (38%) are staying with friends and relatives
- Almost all the rest stay in serviced accommodation.
- 39% arrive in the third quarter, 69% in the summer 6 months
- A fairly even spread across the age groups but few over 65. A younger age distribution than domestic visitors.

TABLE 1.18 Summary - Trip characteristics

	Business tourism	Visits to friends and relatives	Short holidays	Long holidays	Overseas visits
Total trips in SW	2.3m	4.5m	8.8m	8.2m	
<i>Distribution</i>	%	%	%	%	%
Cornwall	9	23	14	27	10
Devon	30	23	28	36	20
Somerset	13	11	14	10	9
Wiltshire	9	7	7	3	8
Dorset	13	16	17	15	13
Gloucestershire	13	7	8	3	9
Former Avon	13	14	13	5	30
<i>Main transport used</i>	%	%	%	%	
Car	72	79	83	76	15
Train	12	11	8	7	
Bus	2	6	4	5	
Coach	1	*	2	6	12
Plane	3	1	1	2	65
<i>Accommodation used</i>	%		%	%	
Hotel/GH	59		26	22	29
Farm/B+B	10		7	5	20
Rented accom	1		5	23	4
Caravan/camp	6		11	24	3
Holiday camp	-		1	2	*
Hostel/educ	2		*	*	4
Friends /relatives home	11		43	28	38
<i>Month of trip</i>	%	%	%	%	%
J	7	7	4	2	15
F	10	9	6	3	
M	6	8	7	3	
A	5	6	8	8	30
M	7	5	10	8	
J	7	7	8	10	
J	11	9	10	17	39
A	9	8	11	26	
S	6	9	10	12	
O	11	9	7	8	16
N	11	11	9	3	
D	10	13	10	9	
<i>Booking arrangements</i>	%	%	%	%	
No pre-booking	43	82	66	39	
Inclusive trip	4	2	5	10	
Book via travel agent	4	*	1	6	
Book via telephone	40	11	25	43	
Book via internet/e-mail	4	*	1	1	
Book via letter/coupon	*	*	2	4	
Used internet	9	7	12	13	
<i>Duration of trip</i>	%	%	%	%	
1 –3 nights	74	85	100	0	
4-7 nights	17	11	0	77	
8+ nights	9	4	0	23	
Average	2.9	2.9	2.0	6.6	7.9
<i>Party composition</i>	%	%	%	%	
Alone	65	31	17	9	
With children	4	24	26	43	
Adults only	30	44	57	49	

<i>Expenditure</i>	%				
Inclusive package	-				
Accommodation	38				
Travel	21				
Services/advice	1				
Buy clothes	1				
Eat/drink	21				
Other shopping	5				
Entertainment	3				
Other	1				
<i>Location of trip</i>	%	%	%	%	
Seaside	18	21	35	53	
City/large town	48	28	22	8	
Small town	17	28	16	11	
Countryside/village	17	26	26	26	
<i>Main/secondary holiday</i>			%	%	
Only holiday	-	-	4	12	
Main holiday(s)	-	-	27	51	
Secondary holiday	-	-	57	33	
<i>Country of origin</i>					%
USA					17
France					15
Germany					12
Ireland					8
Australia					7
Netherlands					5
Spain					4
Italy					3
Canada					3
S Africa					2
Sweden					2
Belgium					2
Switzerland					2
Other					18
<i>Trip purpose</i>					%
Holiday					42
VFR					31
Business					20
Study					3
Other					4
<i>Port of entry</i>					
Heathrow					33
Gatwick					11
Bristol					15
Other airport					7
Seaport					27
Tunnel					8

TABLE 1.19 Summary - Visitor characteristics

	Business tourism	Visits to friends and relatives	Short holidays	Long holidays	Overseas visits
Total trips in SW	2.3m	4.5m	8.8m	8.2m	
<i>Gender</i>	%	%	%	%	%
Male	78	38	50	40	
Female	22	62	50	60	
<i>Age</i>	%	%	%	%	%
16-24	9	19	16	10	11
25-34	22	22	25	16	16
35-44	26	16	22	22	17
45-54	22	13	15	13	17
55-64	13	13	15	14	13
65+	4	16	15	25	7
<i>Marital status</i>	%				
Married	73	58	65	72	
<i>Social class</i>	%				
AB	36	28	33	27	
C1	36	30	33	27	
C2	23	19	20	22	
DE	4	23	14	22	
<i>Region of residence</i>	%	%	%	%	
Scotland	4	2	1	2	
Wales	9	4	6	5	
NE	*	2	2	1	
NW/Merseyside	9	4	6	7	
Y&H	4	2	3	7	
EM	4	7	3	7	
WM	9	9	10	15	
SW	22	29	27	16	
E	9	7	7	6	
L	9	13	10	11	
SE	17	20	24	20	
<i>Working status</i>	%				
Working FT/PT	91	58	66	36	
<i>Household income</i>	%				
Up to 20K	21	29	24	33	
20+ - 40K	29	29	29	24	
40+ - 60K	25	7	15	9	
60+- 80K	8	2	5	1	
80+- 100K	0	0	2	0	
>100K	4	0	2	1	
DK/NA	12	32	23	31	
<i>Car ownership</i>	%				
Car in hh	91	87	93	84	
<i>Children <16 in hh</i>	%				
Yes	35	33	35	41	
<i>Life cycle</i>	%	%	%	%	
16-34/ unmarried/no kids	12	16	15	5	
16-34/M/no kids	10	6	7	3	
16-34/ kids	11	20	15	17	
35-54/ no kids	25	18	16	12	
35-54/ kids	25	13	19	24	
55+	17	27	28	40	

1.5 Economic impact

This section of the report draws on the findings from an Economic Impact Study undertaken for SW Tourism by Geoff Broom Associates in 2003. The study is based on the Cambridge Model, which uses UKTS, IPS and UKDVS to provide baseline data on tourism volumes and spending in the Region.

Estimates of tourist spending at District and County level are derived from the regional findings from the national surveys, taking account of the distribution of accommodation, attractions and other factors influencing tourism activity at local level.

The breakdown of tourist spending by type of visitor, derived from regional data from the national surveys, allows estimates to be made for each District of the additional turnover generated in tourism related businesses; primarily those in the accommodation, retail, catering, attractions/entertainment and transport sectors. The increased turnover in those businesses benefiting from visitor spending will support employment directly in those businesses as well as additional spending on the purchase of supplies and services from other local businesses. Apart from additional jobs arising indirectly in the latter, further economic activity is generated by spending by employees in jobs supported directly and indirectly by tourism spending.

Estimates of total jobs attributable to tourism are based on assumptions about the proportions spent on wages and supplies, which varies by business sector and by the relative strength of the local economy. The estimates for each District are based on ratios established from surveys of tourism related businesses at numerous locations in the South West and elsewhere. The calculation uses estimates of wage costs arising in different business at the local level, based on district level data from the New Earnings Survey.

TABLE 1.20 Economic impact 2001

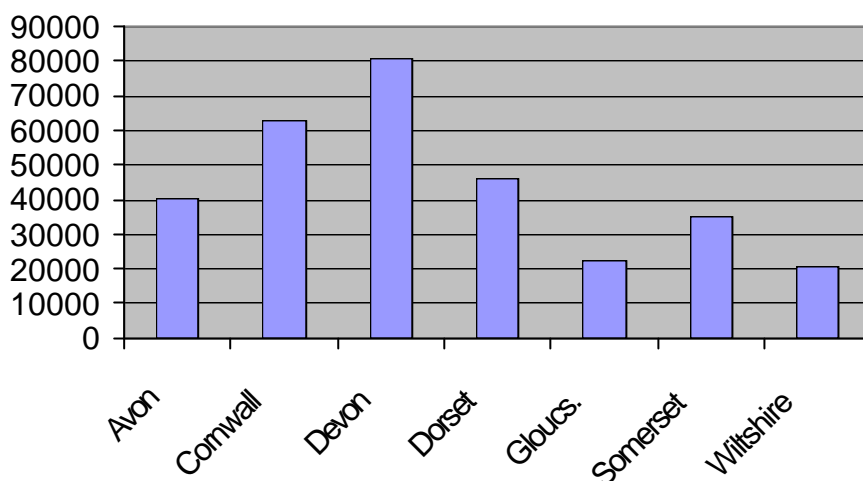
	Tourism spend £m		FTE jobs		Actual jobs
	Staying visitors	Day visitors	Direct	Indirect/ Induced	
Avon	522	700	20627	8707	40017
Cornwall	1035	529	32198	13769	62838
Devon	1312	854	41280	18157	80798
Dorset	664	535	23764	9910	45839
Gloucestershire	267	395	10880	5706	22353
Somerset	458	393	17384	8201	34838
Wiltshire	266	366	10458	4531	20350
SW REGION	4524	3772	156591	68981	307032

Source: SW Tourism economic Impact Study, GBA

In 2001 staying visitors spent £4.5bn in the region, with day visitors contributing a further £3.8bn. (Table 1.20). The impact of this spending as it circulates through the regional economy is estimated to have supported the equivalent of 225,572 full time equivalent jobs in the region. This equates to a total of 307,032 actual jobs because in practice some of these jobs are part-time or seasonal.

Tourism employment varies quite widely across the region, as shown in Fig 1.10. Devon accounts for 26% of the jobs, Cornwall 20%, whilst Gloucestershire and Wiltshire have the least number of jobs with 7% of the total.

Fig 1.10 Tourism supported jobs, by county



The importance of tourism employment also varies significantly by county. In Cornwall, tourism accounts for 29% of all jobs whereas in Avon, Wiltshire and Gloucestershire the figure is only between 6 and 8%.

TABLE 1.21 The importance of tourism employment

	Tourism employment as % of total employment
Avon	8%
Cornwall	29%
Devon	16%
Dorset	14%
Gloucestershire	8%
Somerset	15%
Wiltshire	6%

Source: Economic Impact Study, GBA

Tourism spending benefits a number of different sectors of the economy. Across the region as a whole, 31% of day and staying visitor spending goes on food and drink, 27% on other shopping, 21% on accommodation, 11% on attractions and activities and a similar amount on travel. (Table 1.22)

TABLE 1.22 Business turnover by sector, 2001

	Day and staying visitor spend (£m)					Total
	Accom	Shop	Food drink	Attractions	Travel	
Avon	184	387	361	128	97	1157
Cornwall	378	315	442	171	155	1461
Devon	472	485	619	235	213	2024
Dorset	234	300	349	132	111	1126
Gloucestershire	96	193	201	68	61	619
Somerset	168	207	248	90	83	796
Wiltshire	95	175	193	65	63	591
SW REGION	1627	2062	2413	889	783	7774

Source: Economic Impact Study, GBA

Note: A proportion of travel spend has been assumed to take place at destination.