

## 4.5 Gloucestershire

Gloucestershire is one of principal gateways to the South West, and the most enduring image of the county is one of gentle hills with stone walls criss-crossing the landscape, hidden river valleys and market towns and villages made of the famous honey coloured Cotswold stone. The story of the Cotswolds is really the story of wool and agriculture, and towns such as Winchcombe, Bibury and Painswick have a timeless charm that fascinates visitors from all over the world. The Cotswold area of Gloucestershire includes world-famous historic houses and gardens such as those at Hidcote Manor, Painswick, Westonbirt Arboretum and Sudeley Castle, home of Henry VIII's last Queen.

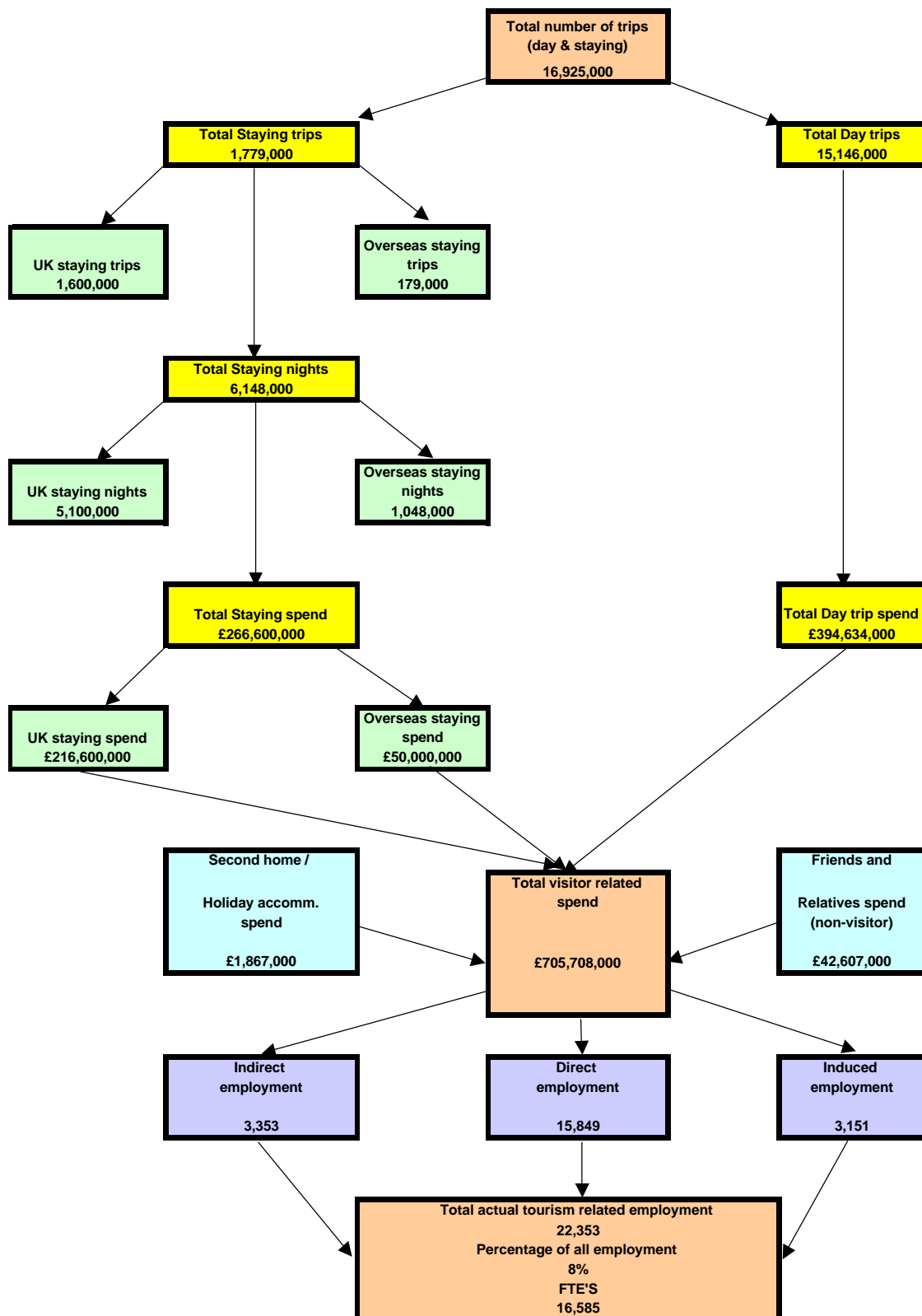
Gloucestershire's attraction for tourists stretches beyond the Cotswold Hills, however. The Royal Forest of Dean is one of the most unspoilt areas in England, with 24,000 acres of ancient Forest providing a magical setting for walking and other outdoor pursuits. Water sports are abundant on the River Wye and many other activities are available from rock climbing, abseiling, archery, golfing, fishing, horse riding and caving. The Forest is also well known for the quality of work produced by the potters and artists who choose to live locally.

Between the Cotswold Hills and the edge of the Forest of Dean lie the green pastures of the Severn Vale. The beautiful river valley of the Severn has a verdant landscape of orchards and flood plain, and many intriguing towns and villages can be found. The major settlement in the Vale is Tewkesbury; an important medieval town still dominated by its splendid 12th century abbey and crooked black and white timber-framed buildings

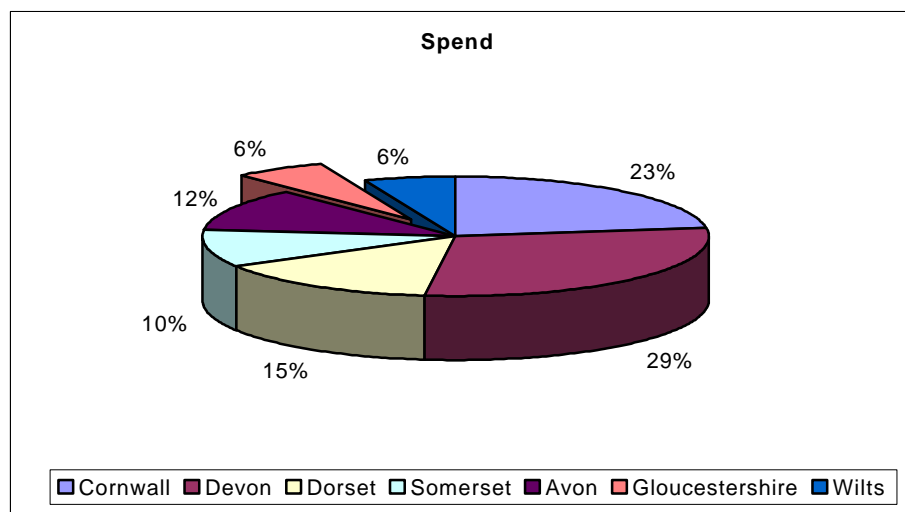
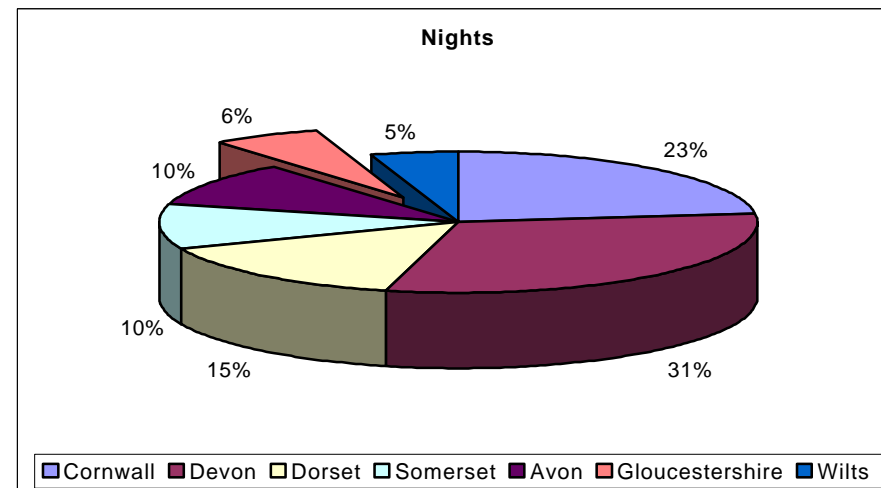
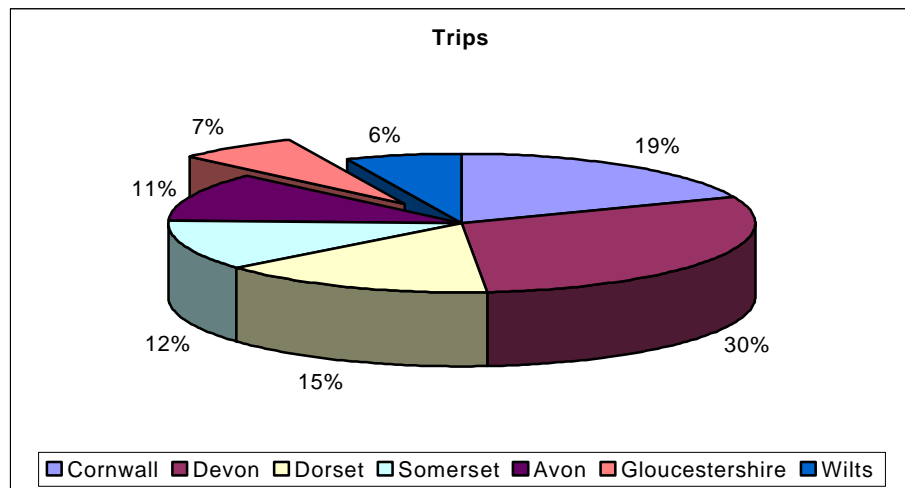
Cheltenham has colour, style and life and the spa town has a first class range of accommodation, restaurants, theatres and shops. As winner of "Beautiful Britain in Bloom", Cheltenham is renowned for its gracious Regency architecture, colourful parks and floral decorations. The spa waters can still be taken at the Pittville Pump Room, a grade I listed building open to the public.

The City of Gloucester was established by the Romans and has played host to many different peoples, Celts, Romans, Saxons and Normans, each leaving their individual mark. Gloucester's Docks have been a key engine of the area's economy and, with the help of English Heritage, it is proposed that the Docks be preserved.

## Gloucestershire: Facts at a glance



## Gloucestershire: Staying visitors in context



	Trips	Nights	Spend
<b>Cornwall</b>	5,000,000	24,175,000	£1,034,700,000
<b>Devon</b>	7,791,000	32,318,000	£1,312,300,000
<b>Dorset</b>	4,061,000	15,740,000	£664,300,000
<b>Somerset</b>	3,070,000	10,737,000	£457,748,000
<b>Avon</b>	2,966,000	10,623,000	£522,152,000
<b>Gloucestershire</b>	<b>1,779,000</b>	<b>6,148,000</b>	<b>£266,600,000</b>
<b>Wilts</b>	1,660,000	5,003,000	£266,200,000
<b>TOTALS</b>	<b>26,327,000</b>	<b>104,744,000</b>	<b>£4,524,000,000</b>

## Gloucestershire: Staying visitors in detail

### KEY FACTS:

- Gloucestershire generates 7% (1.7 million) of trips, 6% (6.1 million) of nights and 6% (£266.6 million) of spend in the South West region
- The domestic market is the biggest generator of trips (1.6 million), nights (5.1 million) and spend (£216.6 million) in Gloucestershire
- The VFR sector is the most important in terms of domestic trip generation (698,000), whereas the serviced accommodation sector is most important in terms of income generation (£112.2 million)

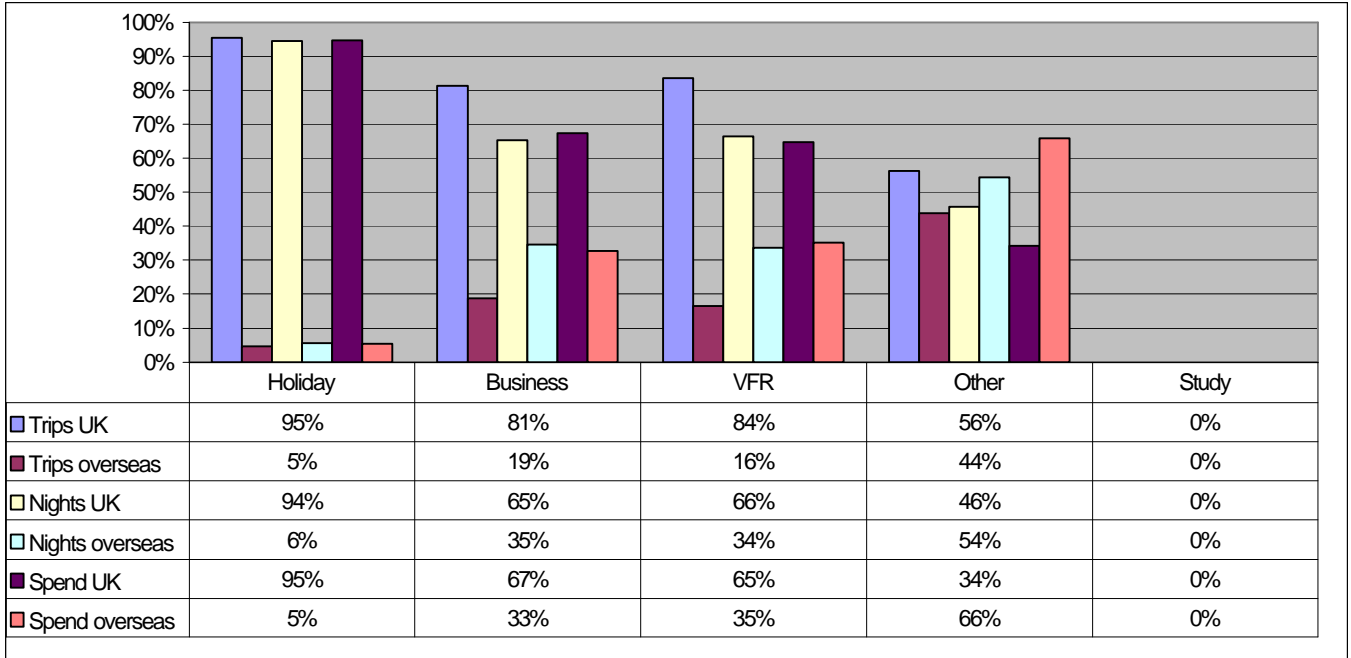
### Trips, nights and spend by accommodation (Domestic tourists)

	Trips	Nights	Spend
Serviced	517,000	1,356,000	£112,201,000
Self catering	69,000	352,000	£13,326,000
Touring caravans /tents	144,000	702,000	£15,453,000
Static vans/holiday centres	4,000	23,000	£554,000
Group/campus	12,000	109,000	£2,919,000
Second homes	27,000	112,000	£2,237,000
Boat moorings	4,000	22,000	£619,000
Other	125,000	470,000	£12,782,000
Staying with friends and relatives	698,000	1,955,000	£56,509,000
<b>Total</b>	<b>1,600,000</b>	<b>5,100,000</b>	<b>£216,600,000</b>

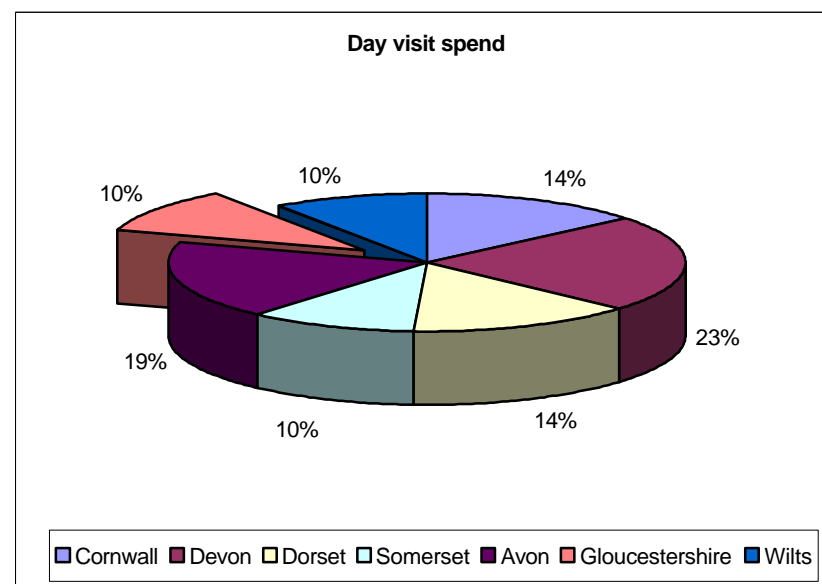
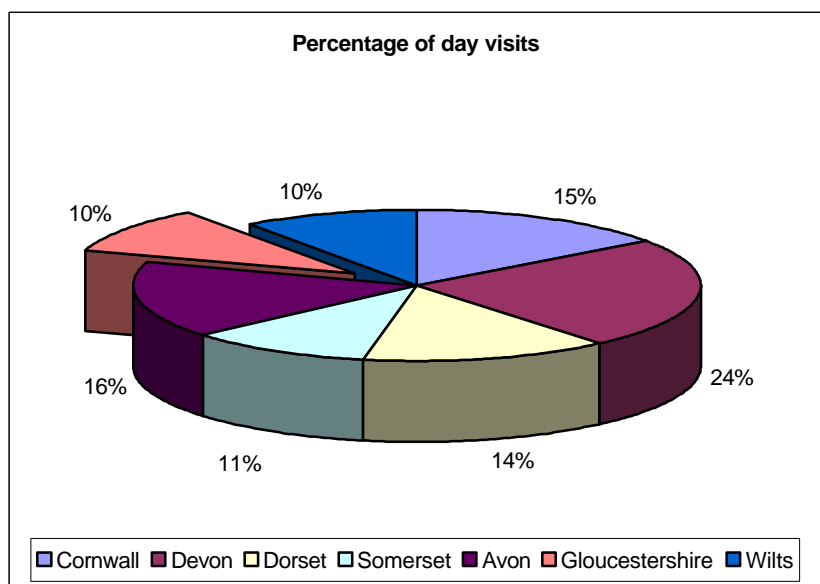
### Trips, nights and spend by accommodation (Overseas tourists)

	Trips	Nights	Spend
Serviced	92,000	278,000	£23,980,000
Self catering	3,000	80,000	£2,554,000
Touring caravans /tents	5,000	28,000	£595,000
Static vans/holiday centres	0	0	£3,000
Group/campus	17,000	188,000	£6,764,000
Second homes	4,000	64,000	£1,063,000
Boat moorings	0	0	£0
Other	4,000	14,000	£810,000
Staying with friends and relatives	56,000	396,000	£14,231,000
<b>Total</b>	<b>179,000</b>	<b>1,048,000</b>	<b>£50,000,000</b>

**Trips, nights and spend by purpose**



## Gloucestershire: Day visits in context

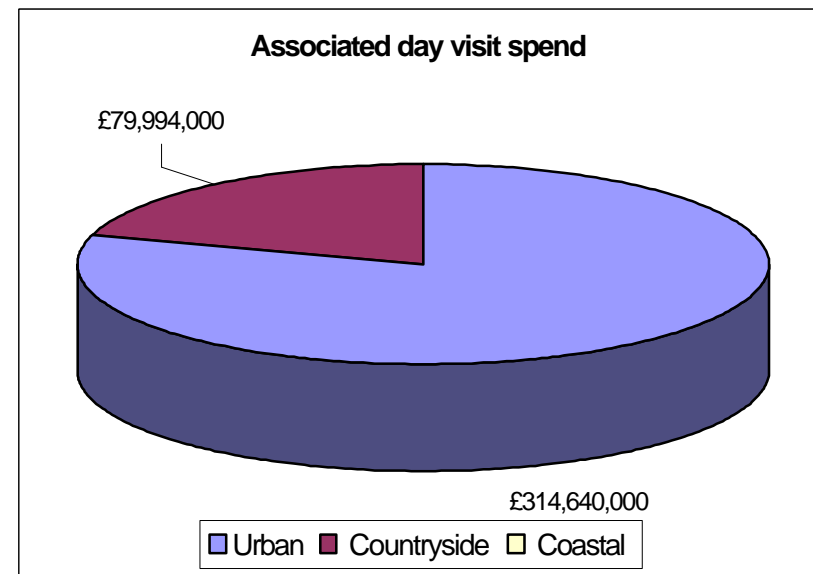
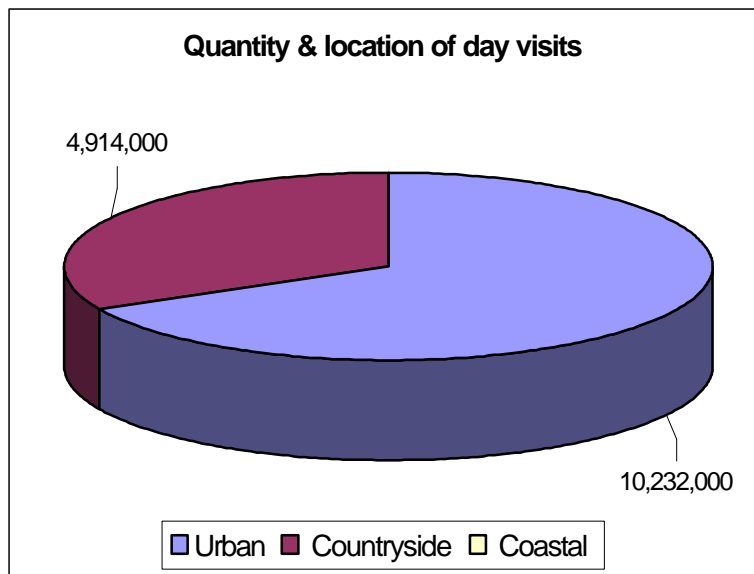


	<b>Trips</b>	<b>Spend</b>
<b>Cornwall</b>	22,411,500	£528,605,899
<b>Devon</b>	35,268,897	£853,731,090
<b>Dorset</b>	20,929,672	£535,177,761
<b>Somerset</b>	16,065,096	£393,181,000
<b>Avon</b>	23,966,136	£700,488,369
<b>Gloucestershire</b>	<b>15,146,000</b>	<b>£394,634,000</b>
<b>Wilts</b>	14,760,000	£366,251,000
<b>Totals</b>	<b>148,547,300</b>	<b>£3,772,069,119</b>

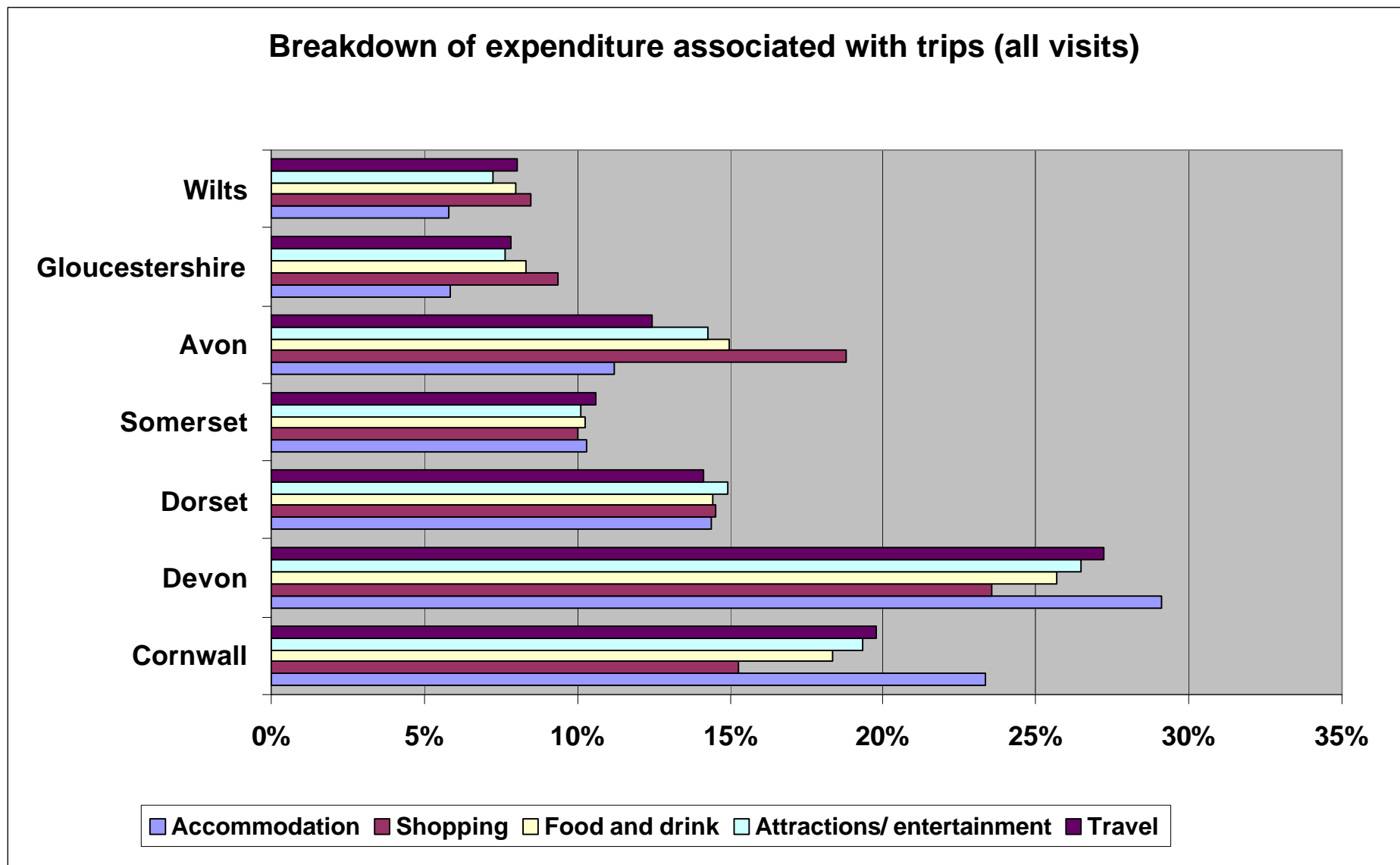
## Gloucestershire: Day visits in detail

### KEY FACTS:

- Gloucestershire accounts for 10% (15.1 million) of day trips and 10% of spend (£394.6 million) in the South West region
- The largest proportion of day trips in Gloucestershire are urban (10.2 million)
- Day trip spend in Gloucestershire is highest amongst those going to urban areas (£314.6 million)



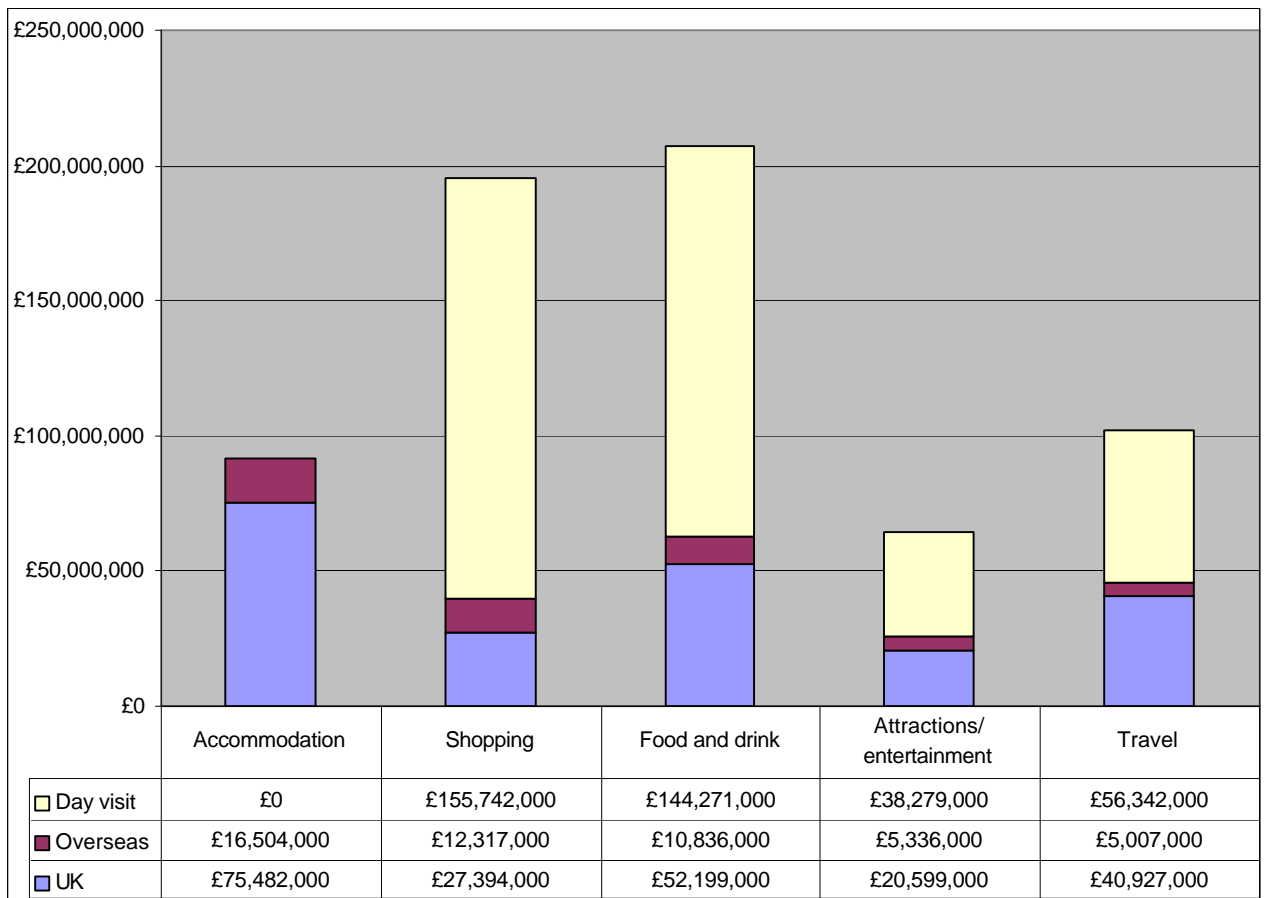
**Gloucestershire: Breakdown of expenditure associated with trips in context**



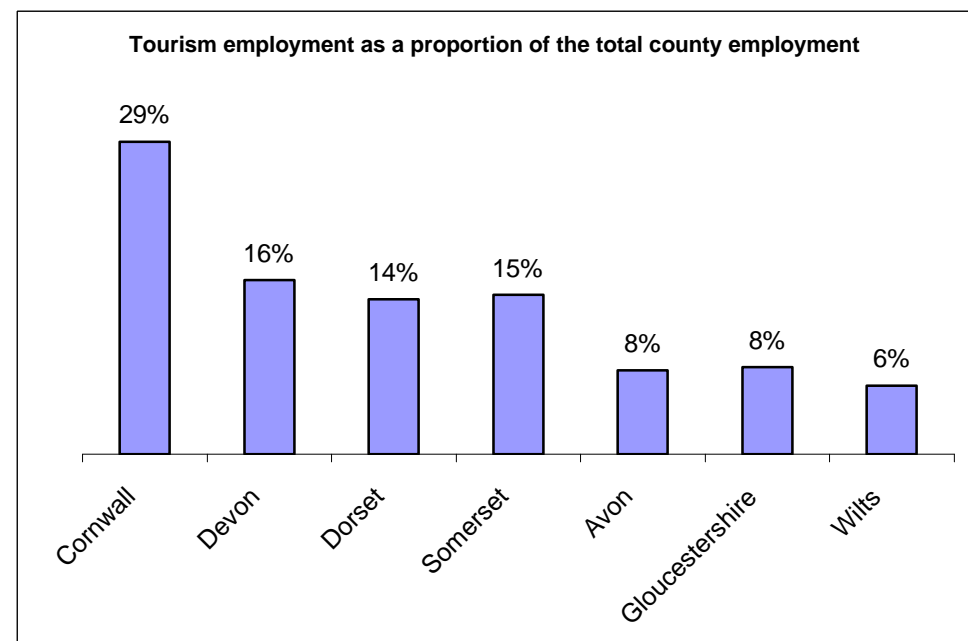
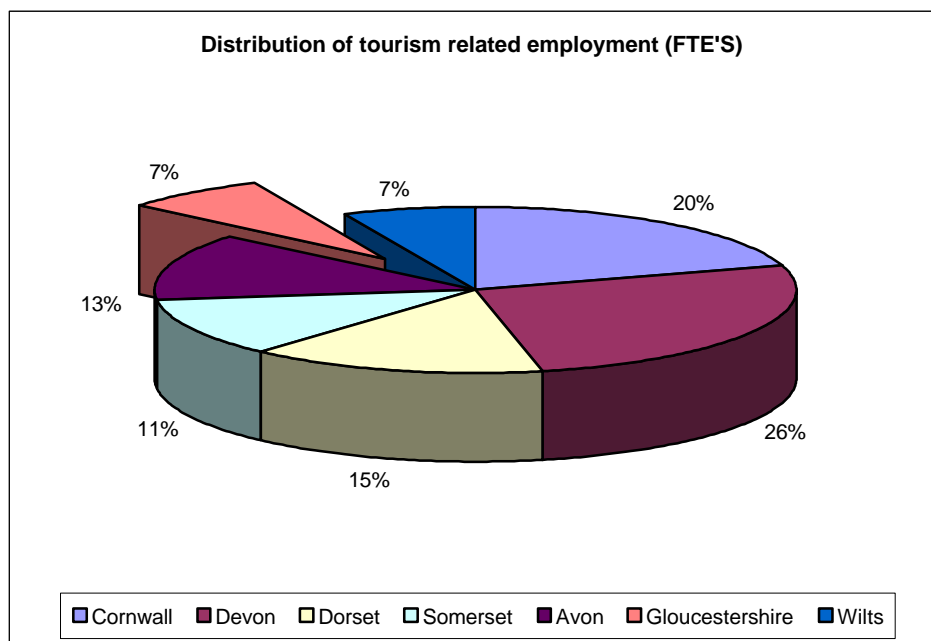
## Gloucestershire: Breakdown of expenditure associated with trips in detail

### KEY FACTS:

- *The largest proportion of tourism expenditure is spent on food and drink*
- *Domestic and overseas staying visitors spent the largest portion of their expenditure on accommodation (£75.4 million and £16.5 million respectively)*



## Gloucestershire: Employment in context



	Number of FTE's
<b>Cornwall</b>	45,966
<b>Devon</b>	59,438
<b>Dorset</b>	33,674
<b>Somerset</b>	25,585
<b>Avon</b>	29,334
<b>Gloucestershire</b>	<b>16,585</b>
<b>Wilts</b>	14,989
<b>Totals</b>	<b>225,573</b>

## Gloucestershire: Employment in detail

### KEY FACTS:

- Gloucestershire has 7% of tourism jobs in the region, equating to 16,585 FTEs
- 8% of employment in Gloucestershire is related to tourism
- The largest proportion of jobs directly related to tourism in Gloucestershire is in the catering sector (4,184)

#### Total employment related to tourism spending ( estimated actual )

	Staying tourists	Day visitors	Total
Direct	7,269	8,580	15,849
Indirect	1,728	1,626	3,353
Induced	1,507	1,644	3,151
<b>Totals</b>	<b>10,503</b>	<b>11,850</b>	<b>22,353</b>

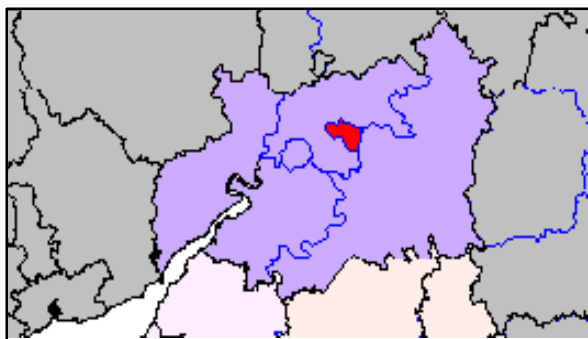
#### Total employment related to tourism spending ( FTE's )

	Staying tourists	Day visitors	Total
Direct	5,094	5,786	10,880
Indirect	1,516	1,426	2,942
Induced	1,322	1,442	2,764
<b>Totals</b>	<b>7,932</b>	<b>8,654</b>	<b>16,585</b>

#### Direct employment in businesses in receipt of visitor expenditure (FTE's)

	Staying	Day	Total
Accommodation	1,882	58	1,940
Retailing	443	1,736	2,179
Catering	1,272	2,912	4,184
Attractions/entertainment	500	766	1,266
Transport	255	313	569
Arising from non trip spend	741	0	741
<b>Totals</b>	<b>5,094</b>	<b>5,786</b>	<b>10,880</b>

# Cheltenham Briefing



<b>KEY FACTS</b>	
303,000	trips by staying visitors
1,005,000	staying visitor nights
£46,414,000	spend by staying visitors
2,421,000	day visits
£73,633,000	spend by day visitors
£8,216,000	other tourism related spend
3,835	jobs related to tourism spending
8%	of employment is supported by tourism

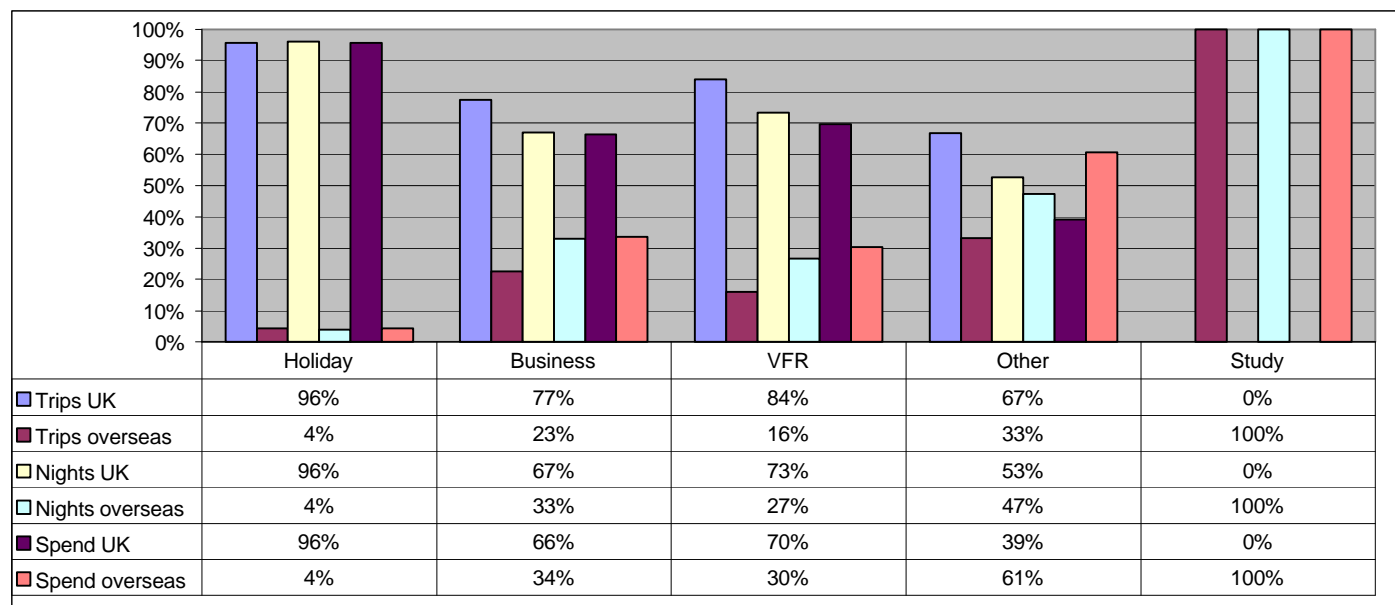
## Trips, nights and spend by accommodation (Domestic tourists)

	Trips	Nights	Spend
Serviced	92,000	243,000	£20,088,000
Self catering	4,000	21,000	£811,000
Touring caravans /tents	6,000	28,000	£607,000
Static vans/holiday centres	0	0	£0
Group/campus	3,000	31,000	£839,000
Second homes	3,000	13,000	£250,000
Boat moorings	0	0	£0
Other	24,000	89,000	£2,429,000
Staying with friends and relatives	133,000	372,000	£10,739,000
<b>Total</b>	<b>265,000</b>	<b>796,000</b>	<b>£35,763,000</b>

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

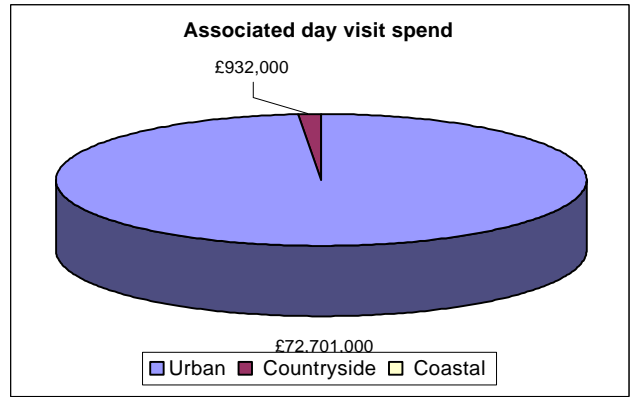
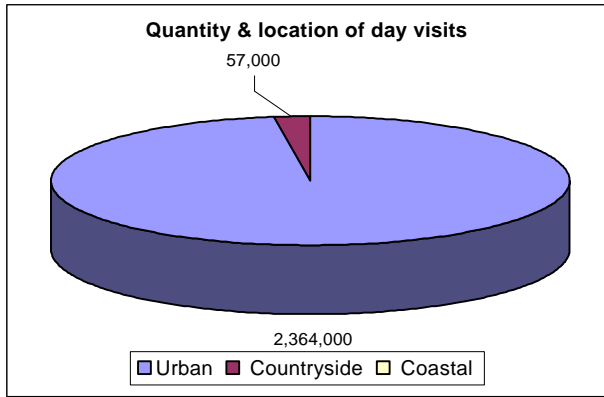
	Trips	Nights	Spend
Serviced	21,000	64,000	£5,551,000
Self catering	0	5,000	£155,000
Touring caravans /tents	0	1,000	£23,000
Static vans/holiday centres	0	0	£0
Group/campus	5,000	54,000	£1,943,000
Second homes	0	7,000	£119,000
Boat moorings	0	0	£0
Other	1,000	3,000	£154,000
Staying with friends and relatives	11,000	75,000	£2,705,000
<b>Total</b>	<b>38,000</b>	<b>209,000</b>	<b>£10,651,000</b>

## Trips, nights and spend by purpose

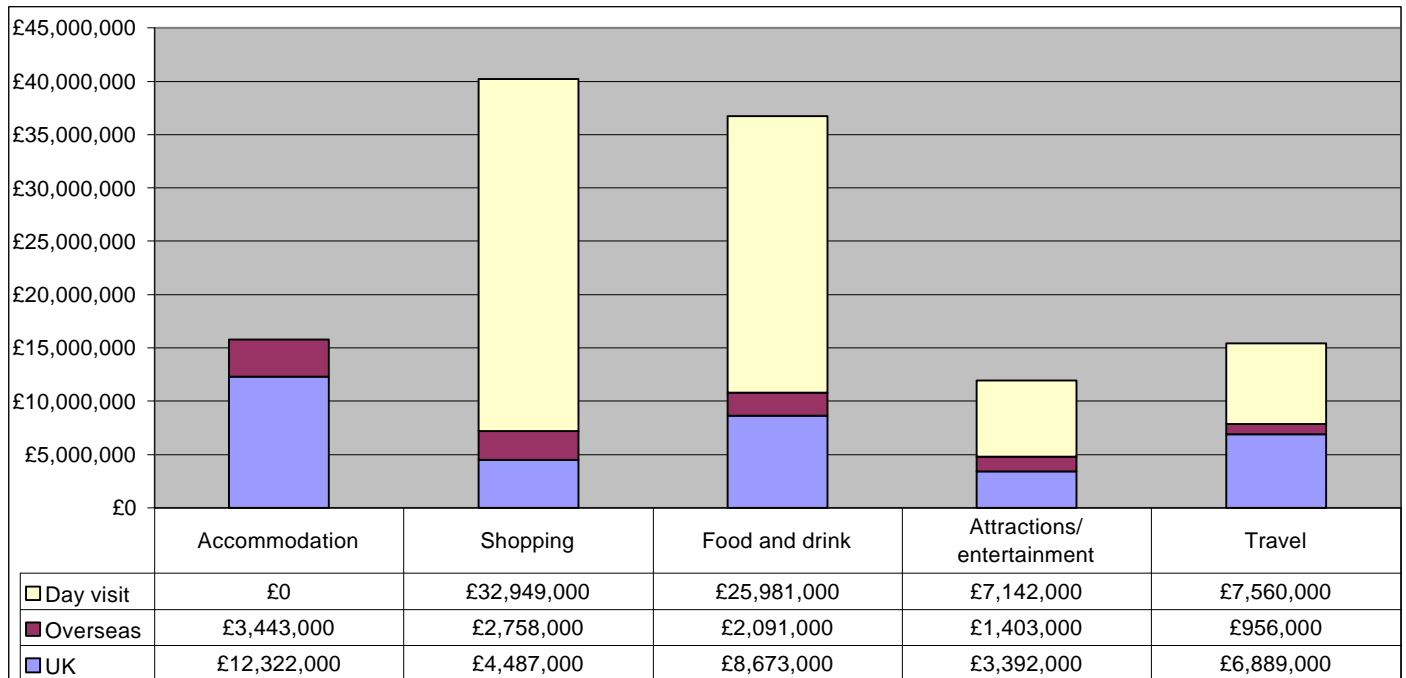


# Cheltenham Briefing

## Day visits



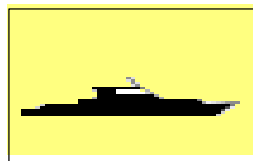
## Expenditure associated with trips



## Other tourism related spend



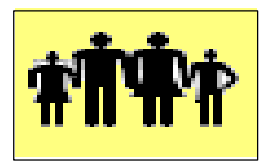
Second Homes  
£119,000



Boats  
£0



Static Vans  
£0



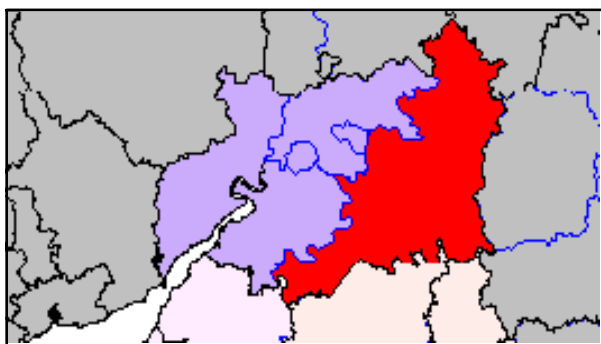
VFR  
£8,097,000

Apart from expenditure associated with the individual trips, some forms of activity also involve ongoing expenditure on the accommodation or result in additional spending by non visitors eg friends and relatives with whom the tourist is staying.

## Total employment related to tourism spending ( estimated actual )

	Staying tourists	Day visitors	Total
Direct	1,304	1,660	2,965
Indirect	267	249	516
Induced	164	190	354
<b>Total</b>	<b>1,735</b>	<b>2,100</b>	<b>3,835</b>
<b>Estimated number of FTE's</b>			<b>2,797</b>

## Cotswold Briefing



### KEY FACTS

433,000 trips by staying visitors  
 1,587,000 staying visitor nights  
 £75,920,000 spend by staying visitors  
 5,000,000 day visits  
 £120,590,000 spend by day visitors  
 £6,870,000 other tourism related spend  
 5,478 jobs related to tourism spending  
 13% of employment is supported by tourism

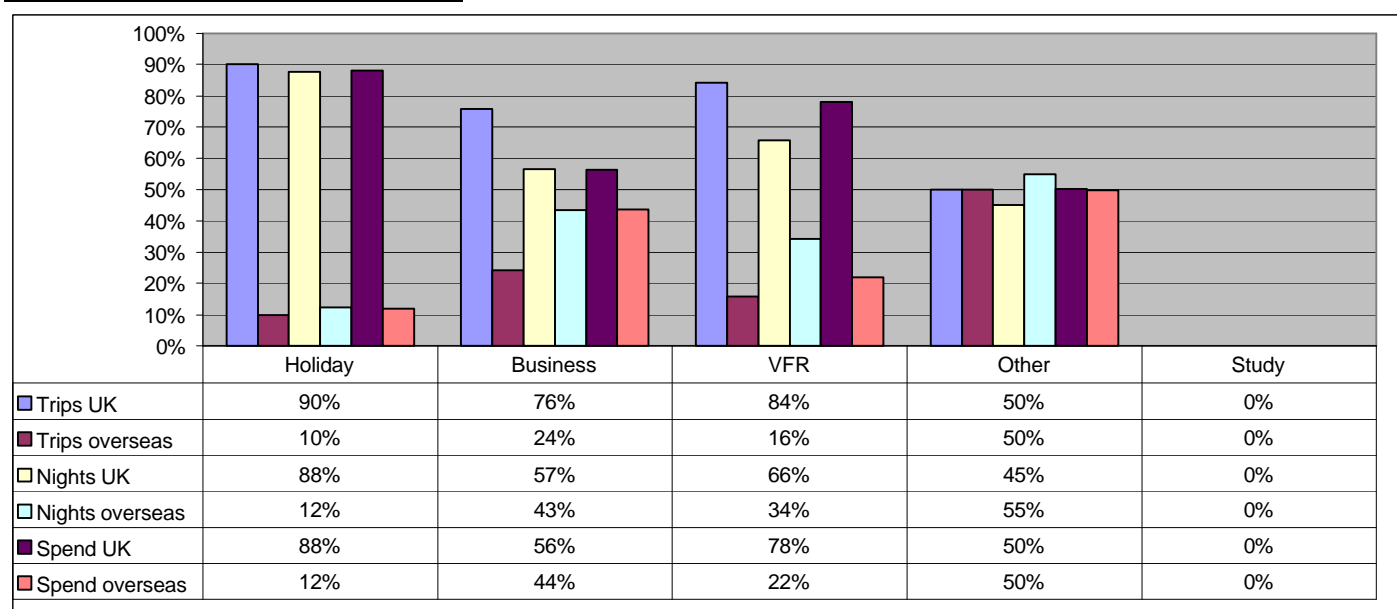
### Trips, nights and spend by accommodation (Domestic tourists)

	Trips	Nights	Spend
Serviced	161,000	423,000	£34,998,000
Self catering	30,000	153,000	£5,793,000
Touring caravans /tents	33,000	162,000	£3,570,000
Static vans/holiday centres	4,000	22,000	£544,000
Group/campus	6,000	58,000	£1,560,000
Second homes	12,000	52,000	£1,040,000
Boat moorings	0	0	£0
Other	19,000	70,000	£1,912,000
Staying with friends and relatives	104,000	292,000	£8,454,000
<b>Total</b>	<b>371,000</b>	<b>1,233,000</b>	<b>£57,871,000</b>

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

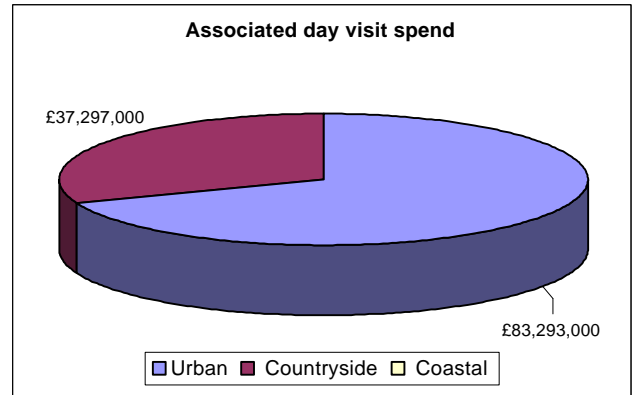
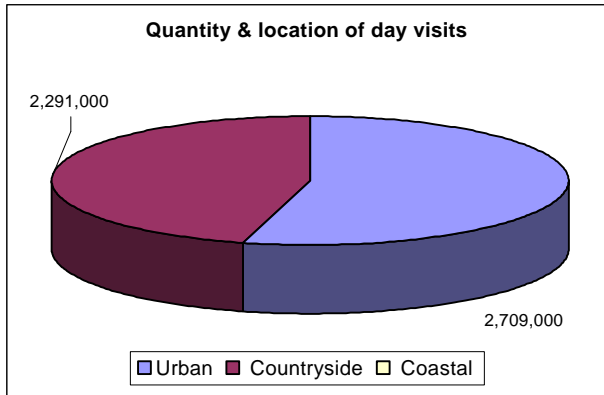
	Trips	Nights	Spend
Serviced	40,000	121,000	£10,439,000
Self catering	1,000	35,000	£1,110,000
Touring caravans /tents	1,000	6,000	£137,000
Static vans/holiday centres	0	0	£3,000
Group/campus	9,000	101,000	£3,615,000
Second homes	2,000	30,000	£494,000
Boat moorings	0	0	£0
Other	1,000	2,000	£121,000
Staying with friends and relatives	8,000	59,000	£2,129,000
<b>Total</b>	<b>62,000</b>	<b>354,000</b>	<b>£18,049,000</b>

### Trips, nights and spend by purpose

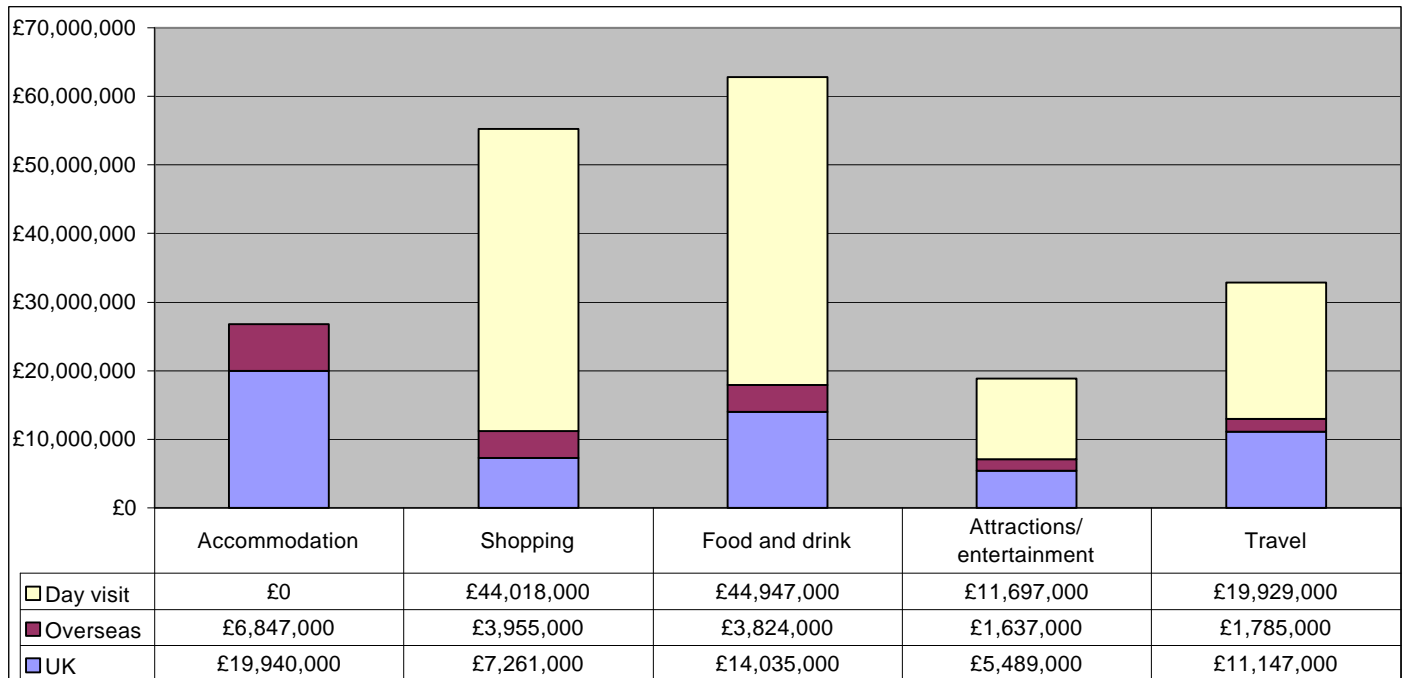


# Cotswold Briefing

## Day visits



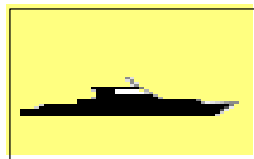
## Expenditure associated with trips



## Other tourism related spend



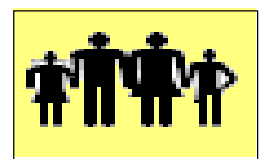
Second Homes  
£496,000



Boats  
£0



Static Vans  
£0



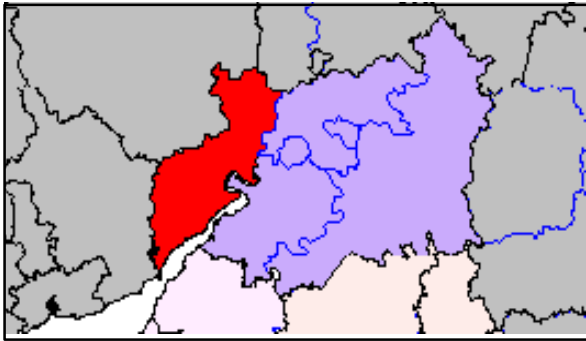
VFR  
£6,374,000

Apart from expenditure associated with the individual trips, some forms of activity also involve ongoing expenditure on the accommodation or result in additional spending by non visitors eg friends and relatives with whom the tourist is staying.

## Total employment related to tourism spending ( estimated actual )

	Staying tourists	Day visitors	Total
Direct	1,985	2,728	4,713
Indirect	289	266	555
Induced	93	118	211
<b>Total</b>	<b>2,366</b>	<b>3,112</b>	<b>5,478</b>
<b>Estimated number of FTE's</b>			<b>3,882</b>

## Forest of Dean Briefing



<b>KEY FACTS</b>	
252,000	trips by staying visitors
1,005,000	staying visitor nights
£30,834,000	spend by staying visitors
1,819,000	day visits
£40,843,000	spend by day visitors
£6,108,000	other tourism related spend
2,145	jobs related to tourism spending
6% of employment is supported by tourism	

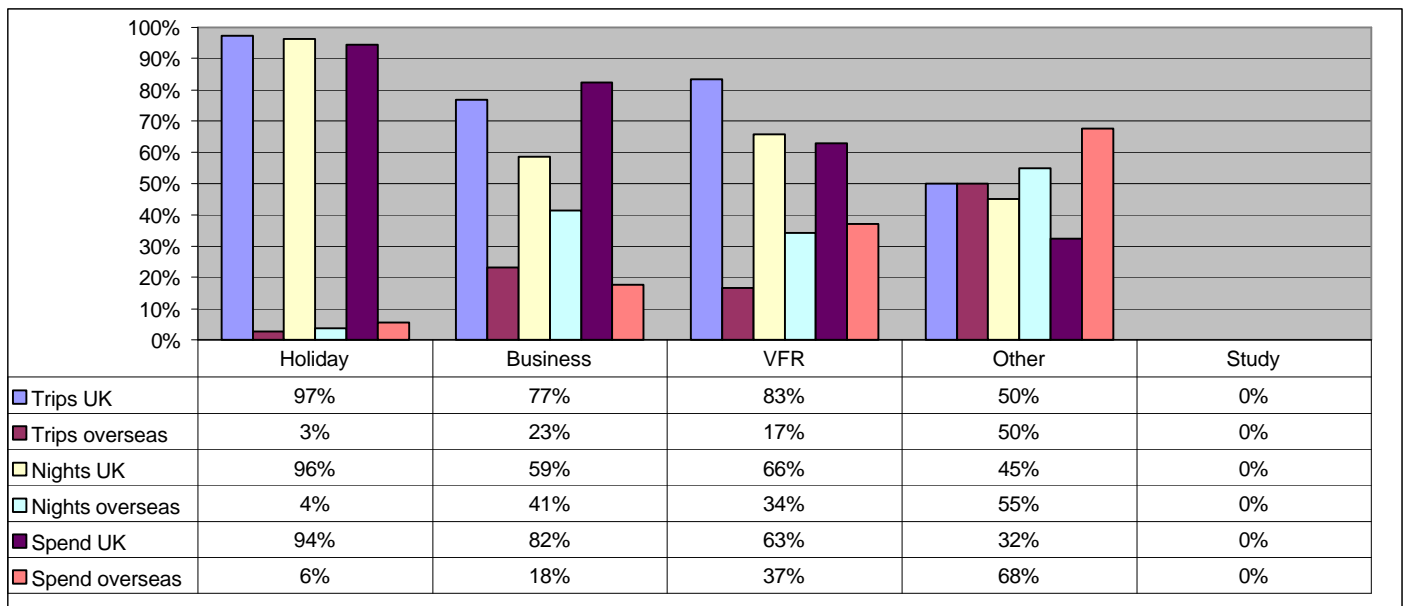
### Trips, nights and spend by accommodation (Domestic tourists)

	Trips	Nights	Spend
Serviced	22,000	57,000	£4,676,000
Self catering	10,000	49,000	£1,859,000
Touring caravans /tents	81,000	394,000	£8,678,000
Static vans/holiday centres	0	0	£0
Group/campus	2,000	16,000	£421,000
Second homes	3,000	15,000	£289,000
Boat moorings	0	0	£0
Other	18,000	66,000	£1,791,000
Staying with friends and relatives	98,000	274,000	£7,918,000
<b>Total</b>	<b>233,000</b>	<b>870,000</b>	<b>£25,632,000</b>

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

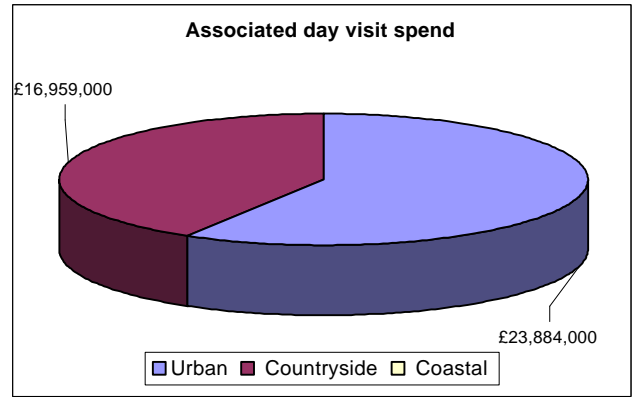
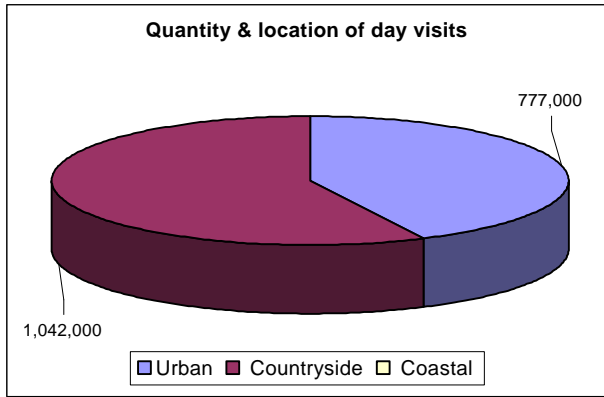
	Trips	Nights	Spend
Serviced	5,000	15,000	£1,292,000
Self catering	0	11,000	£356,000
Touring caravans /tents	3,000	16,000	£334,000
Static vans/holiday centres	0	0	£0
Group/campus	2,000	27,000	£975,000
Second homes	0	8,000	£137,000
Boat moorings	0	0	£0
Other	1,000	2,000	£114,000
Staying with friends and relatives	8,000	56,000	£1,994,000
<b>Total</b>	<b>19,000</b>	<b>135,000</b>	<b>£5,202,000</b>

### Trips, nights and spend by purpose

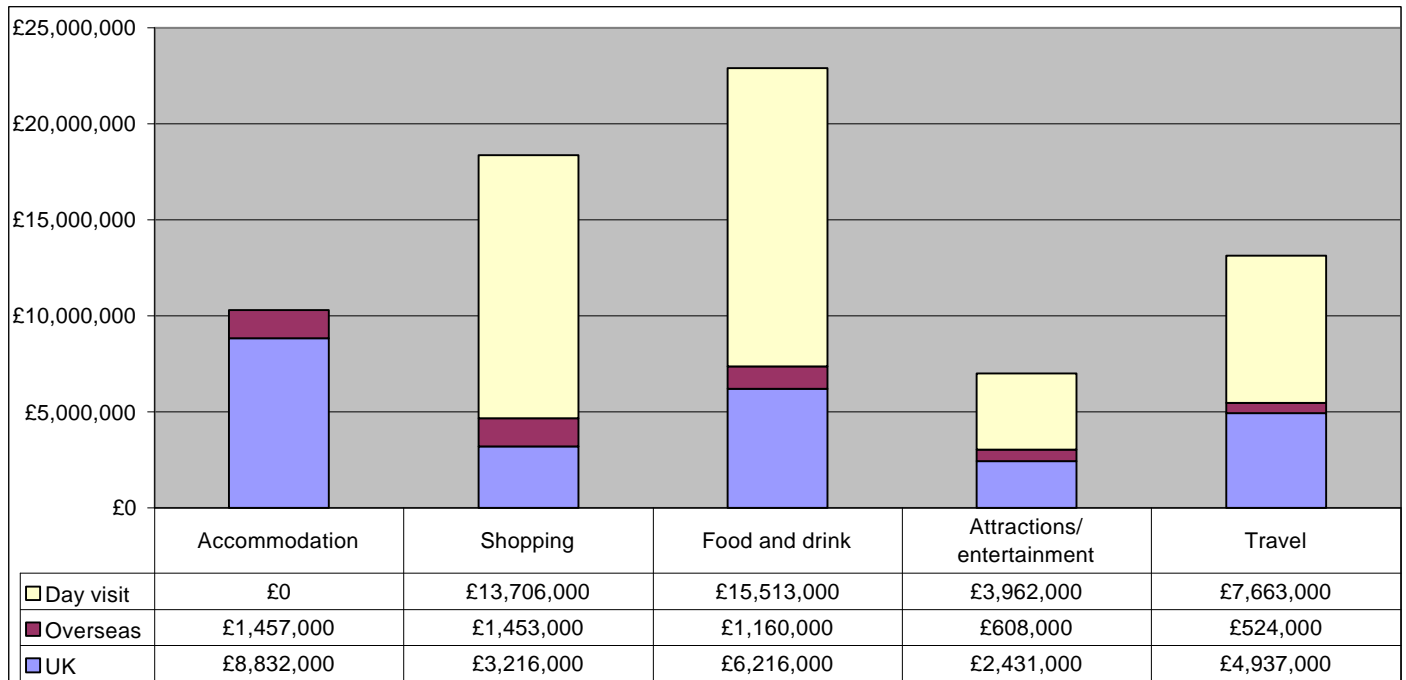


# Forest of Dean Briefing

## Day visits



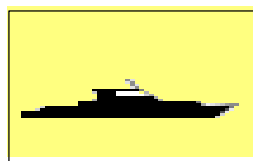
## Expenditure associated with trips



## Other tourism related spend



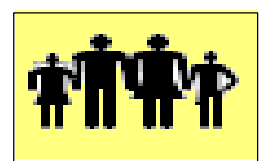
Second Homes  
£138,000



Boats  
£0



Static Vans  
£0



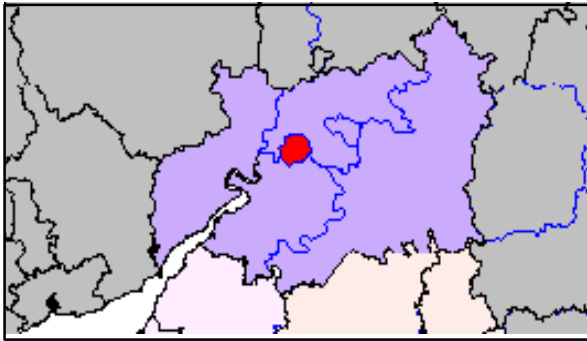
VFR  
£5,970,000

Apart from expenditure associated with the individual trips, some forms of activity also involve ongoing expenditure on the accommodation or result in additional spending by non visitors eg friends and relatives with whom the tourist is staying.

## Total employment related to tourism spending ( estimated actual )

	Staying tourists	Day visitors	Total
Direct	910	933	1,844
Indirect	128	90	218
Induced	43	40	83
<b>Total</b>	<b>1,081</b>	<b>1,064</b>	<b>2,145</b>
<b>Estimated number of FTE's</b>			<b>1,535</b>

# Gloucester Briefing



<b>KEY FACTS</b>	
262,000	trips by staying visitors
799,000	staying visitor nights
£36,604,000	spend by staying visitors
2,389,000	day visits
£72,596,000	spend by day visitors
£8,258,000	other tourism related spend
3,742	jobs related to tourism spending
7%	of employment is supported by tourism

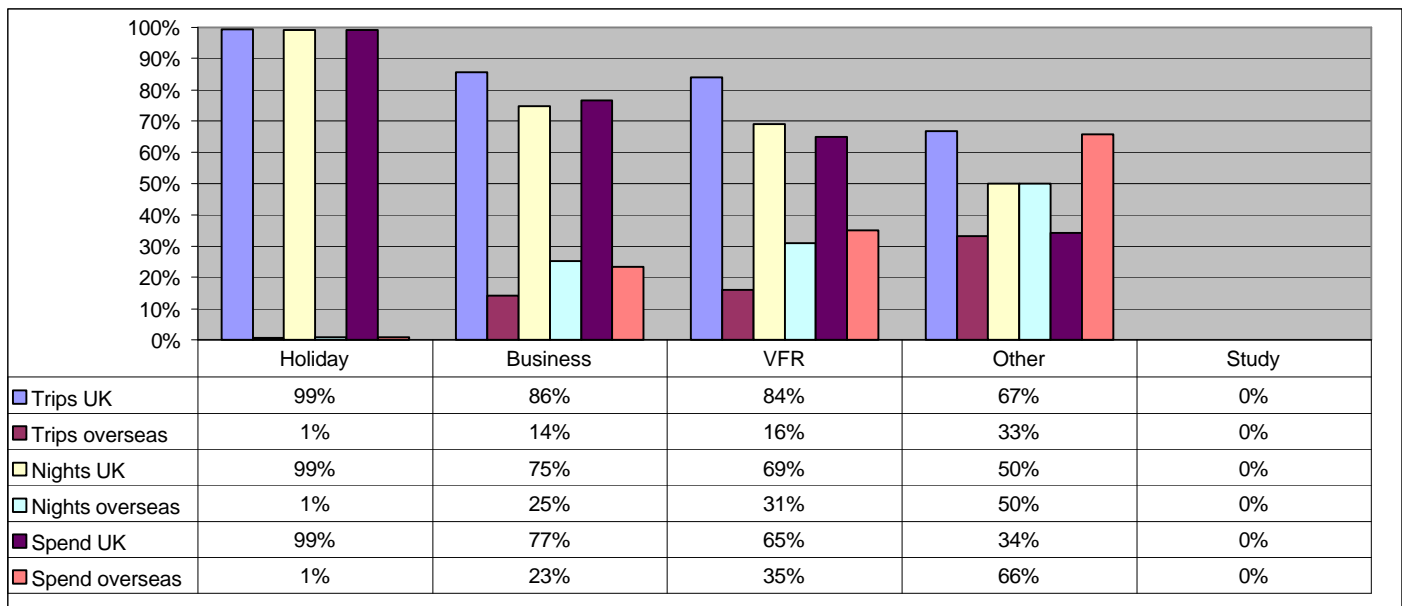
## Trips, nights and spend by accommodation (Domestic tourists)

	Trips	Nights	Spend
Serviced	80,000	211,000	£17,425,000
Self catering	1,000	4,000	£158,000
Touring caravans /tents	0	0	£0
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Second homes	2,000	6,000	£127,000
Boat moorings	0	3,000	£77,000
Other	24,000	89,000	£2,429,000
Staying with friends and relatives	133,000	372,000	£10,739,000
<b>Total</b>	<b>240,000</b>	<b>685,000</b>	<b>£30,956,000</b>

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

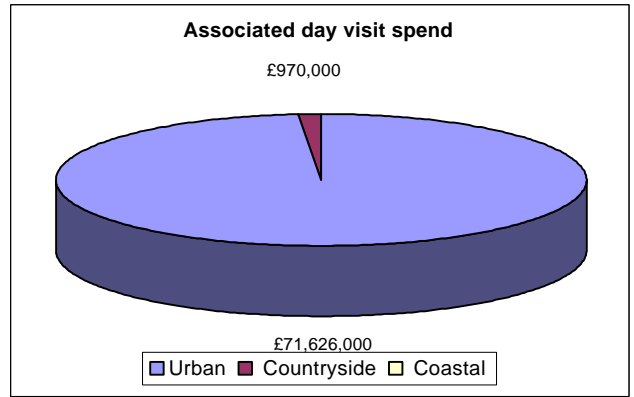
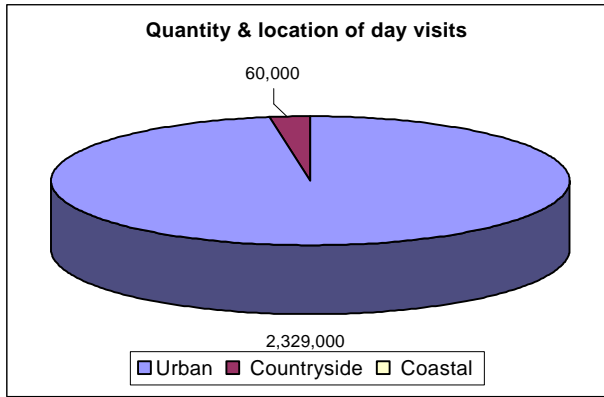
	Trips	Nights	Spend
Serviced	10,000	31,000	£2,699,000
Self catering	0	1,000	£30,000
Touring caravans /tents	0	0	£0
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Second homes	0	4,000	£61,000
Boat moorings	0	0	£0
Other	1,000	3,000	£154,000
Staying with friends and relatives	11,000	75,000	£2,705,000
<b>Total</b>	<b>22,000</b>	<b>114,000</b>	<b>£5,648,000</b>

## Trips, nights and spend by purpose

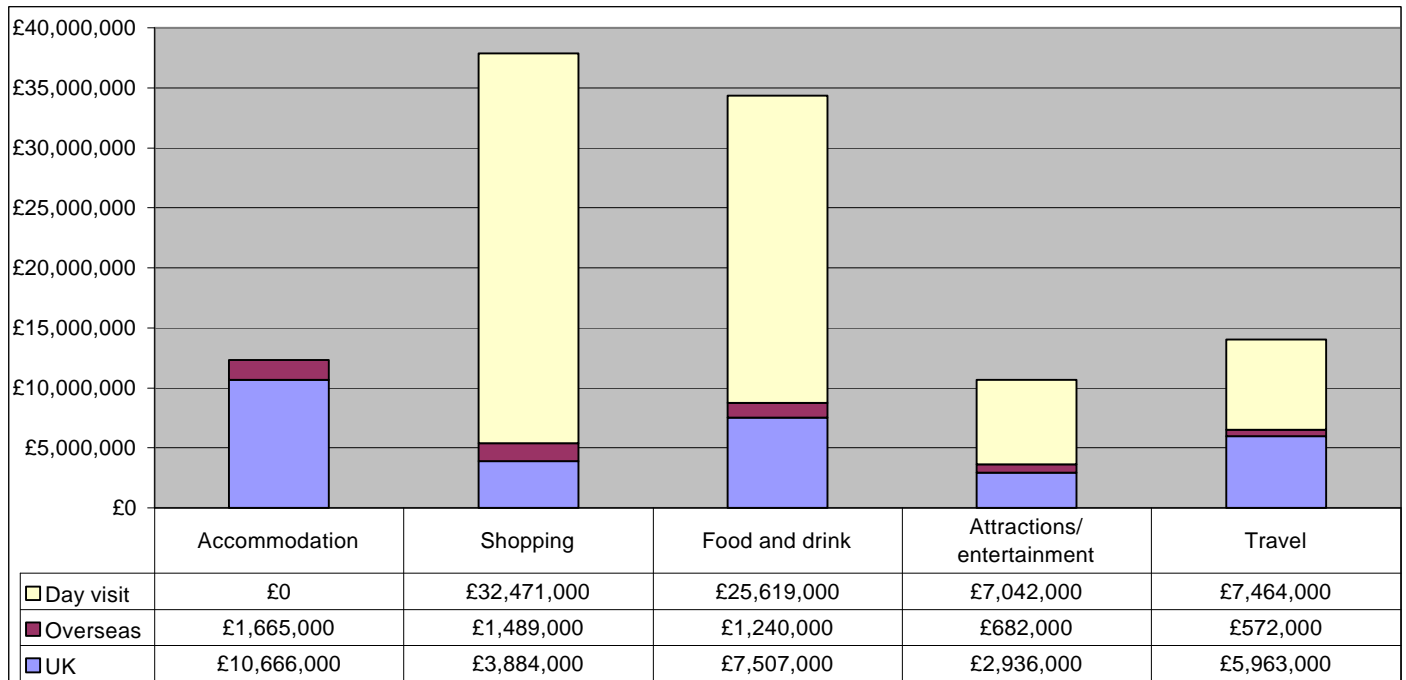


# Gloucester Briefing

## Day visits



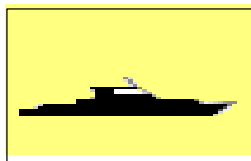
## Expenditure associated with trips



## Other tourism related spend



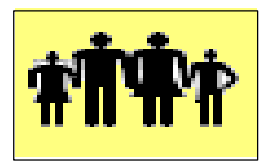
Second Homes  
£61,000



Boats  
£100,000



Static Vans  
£0



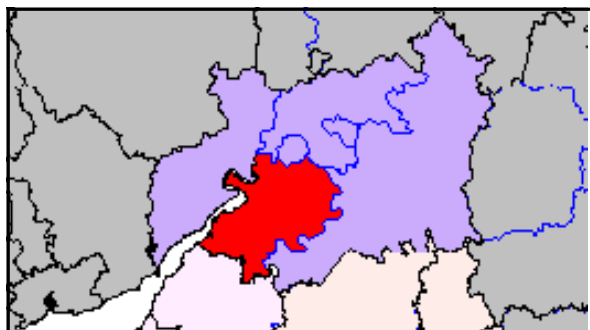
VFR  
£8,097,000

Apart from expenditure associated with the individual trips, some forms of activity also involve ongoing expenditure on the accommodation or result in additional spending by non visitors eg friends and relatives with whom the tourist is staying.

## Total employment related to tourism spending ( estimated actual )

	Staying tourists	Day visitors	Total
Direct	1,137	1,799	2,935
Indirect	216	245	462
Induced	141	203	345
<b>Total</b>	<b>1,495</b>	<b>2,247</b>	<b>3,742</b>
<b>Estimated number of FTE's</b>			<b>2,721</b>

## Stroud Briefing



### KEY FACTS

306,000 trips by staying visitors  
 997,000 staying visitor nights  
 £44,942,000 spend by staying visitors  
 2,244,000 day visits  
 £57,080,000 spend by day visitors  
 £8,505,000 other tourism related spend  
 3,164 jobs related to tourism spending  
 6% of employment is supported by tourism

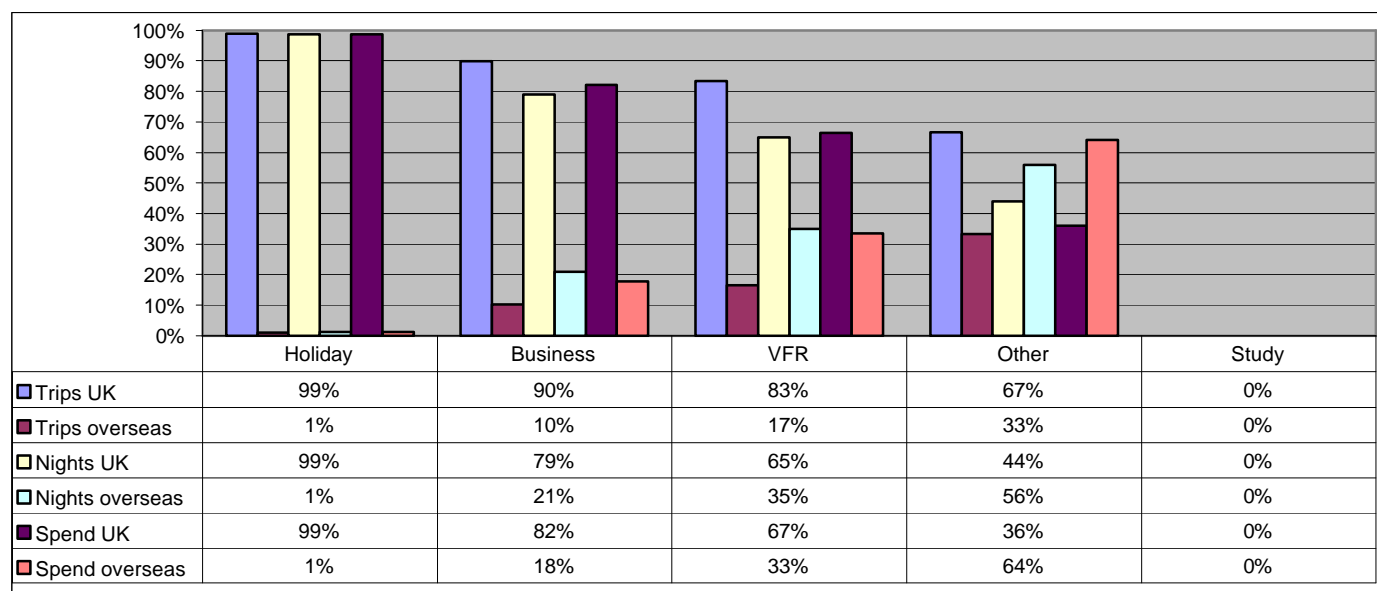
### Trips, nights and spend by accommodation (Domestic tourists)

	Trips	Nights	Spend
Serviced	98,000	257,000	£21,241,000
Self catering	16,000	83,000	£3,164,000
Touring caravans /tents	4,000	20,000	£437,000
Static vans/holiday centres	0	0	£0
Group/campus	0	4,000	£100,000
Second homes	4,000	18,000	£359,000
Boat moorings	0	0	£0
Other	25,000	92,000	£2,500,000
Staying with friends and relatives	137,000	382,000	£11,053,000
<b>Total</b>	<b>284,000</b>	<b>856,000</b>	<b>£38,852,000</b>

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

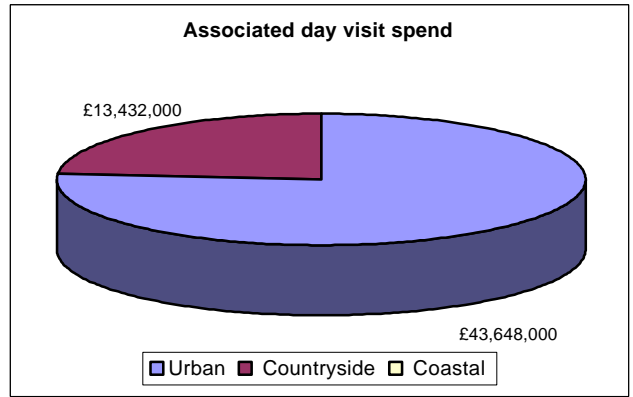
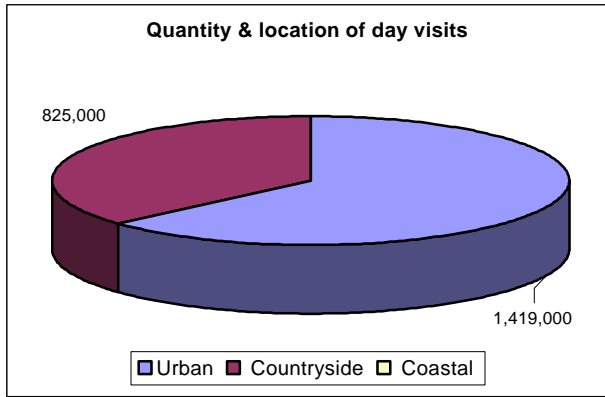
	Trips	Nights	Spend
Serviced	8,000	25,000	£2,123,000
Self catering	1,000	19,000	£606,000
Touring caravans /tents	0	1,000	£17,000
Static vans/holiday centres	0	0	£0
Group/campus	1,000	6,000	£231,000
Second homes	1,000	10,000	£170,000
Boat moorings	0	0	£0
Other	1,000	3,000	£159,000
Staying with friends and relatives	11,000	77,000	£2,784,000
<b>Total</b>	<b>22,000</b>	<b>141,000</b>	<b>£6,090,000</b>

### Trips, nights and spend by purpose

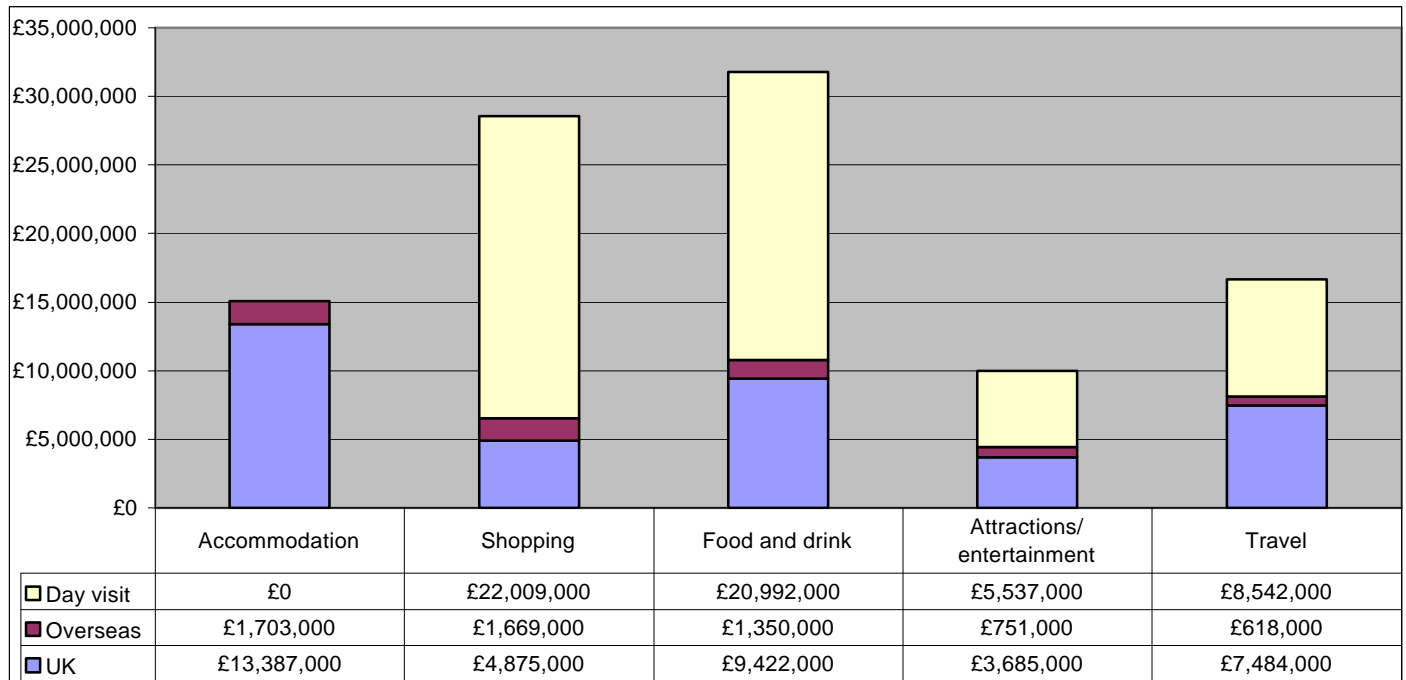


# Stroud Briefing

## Day visits



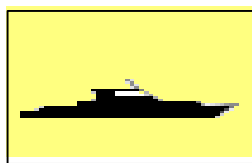
## Expenditure associated with trips



## Other tourism related spend



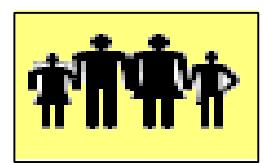
Second Homes  
£171,000



Boats  
£0



Static Vans  
£0



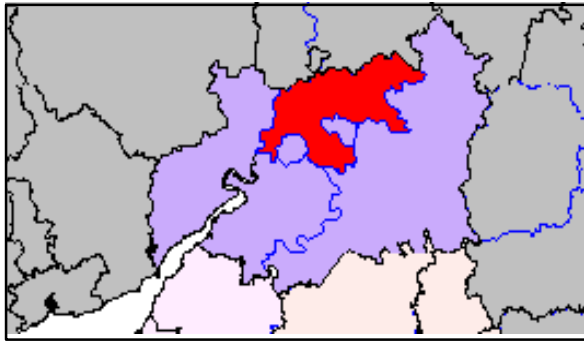
VFR  
£8,334,000

Apart from expenditure associated with the individual trips, some forms of activity also involve ongoing expenditure on the accommodation or result in additional spending by non visitors eg friends and relatives with whom the tourist is staying.

## Total employment related to tourism spending ( estimated actual )

	Staying tourists	Day visitors	Total
Direct	1,216	1,203	2,419
Indirect	259	192	451
Induced	154	140	294
<b>Total</b>	<b>1,630</b>	<b>1,535</b>	<b>3,164</b>
<b>Estimated number of FTE's</b>			<b>2,322</b>

# Tewkesbury Briefing



<b>KEY FACTS</b>	
224,000	trips by staying visitors
755,000	staying visitor nights
£31,885,000	spend by staying visitors
1,273,000	day visits
£29,890,000	spend by day visitors
£6,516,000	other tourism related spend
1,789	jobs related to tourism spending
5%	of employment is supported by tourism

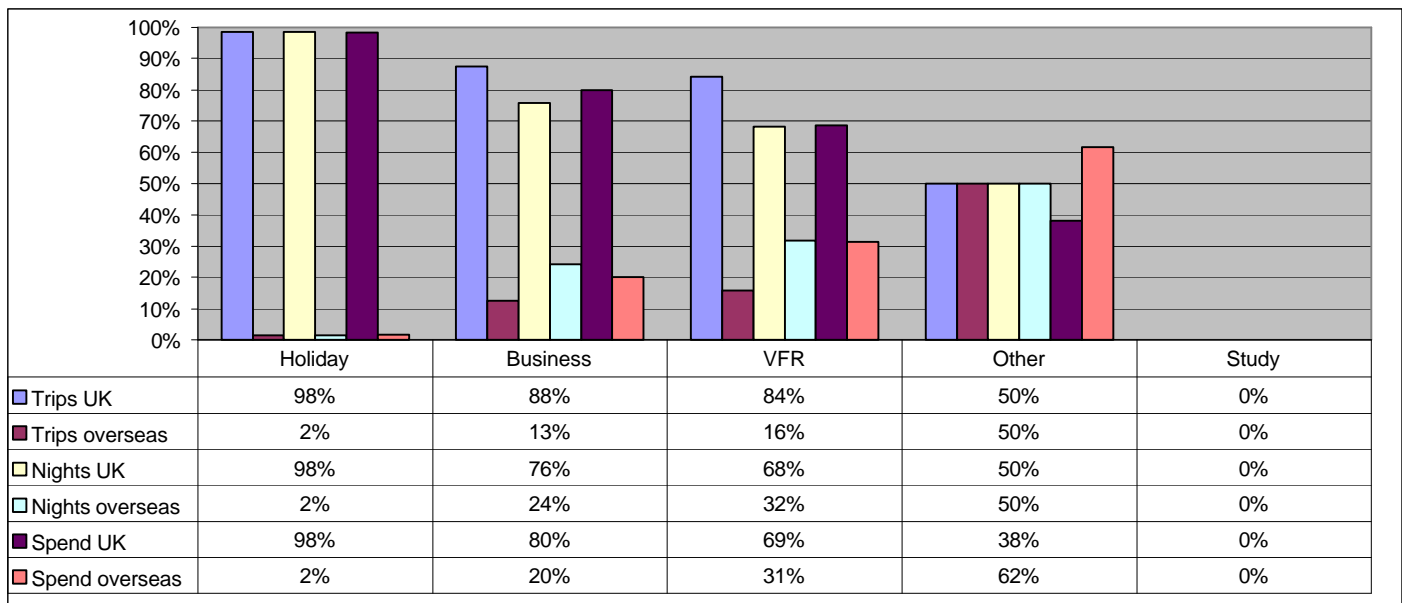
## Trips, nights and spend by accommodation (Domestic tourists)

	Trips	Nights	Spend
Serviced	63,000	166,000	£13,774,000
Self catering	8,000	41,000	£1,542,000
Touring caravans /tents	20,000	98,000	£2,162,000
Static vans/holiday centres	0	0	£10,000
Group/campus	0	0	£0
Second homes	2,000	9,000	£171,000
Boat moorings	3,000	19,000	£541,000
Other	17,000	63,000	£1,720,000
Staying with friends and relatives	94,000	263,000	£7,605,000
<b>Total</b>	<b>208,000</b>	<b>660,000</b>	<b>£27,525,000</b>

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

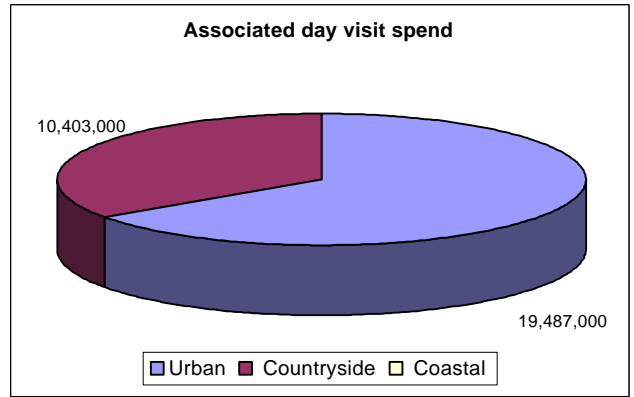
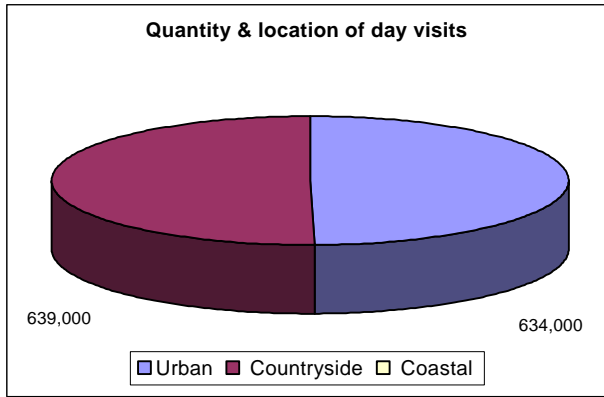
	Trips	Nights	Spend
Serviced	7,000	22,000	£1,876,000
Self catering	0	9,000	£296,000
Touring caravans /tents	1,000	4,000	£83,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Second homes	0	5,000	£81,000
Boat moorings	0	0	£0
Other	0	2,000	£109,000
Staying with friends and relatives	7,000	53,000	£1,915,000
<b>Total</b>	<b>16,000</b>	<b>95,000</b>	<b>£4,360,000</b>

## Trips, nights and spend by purpose

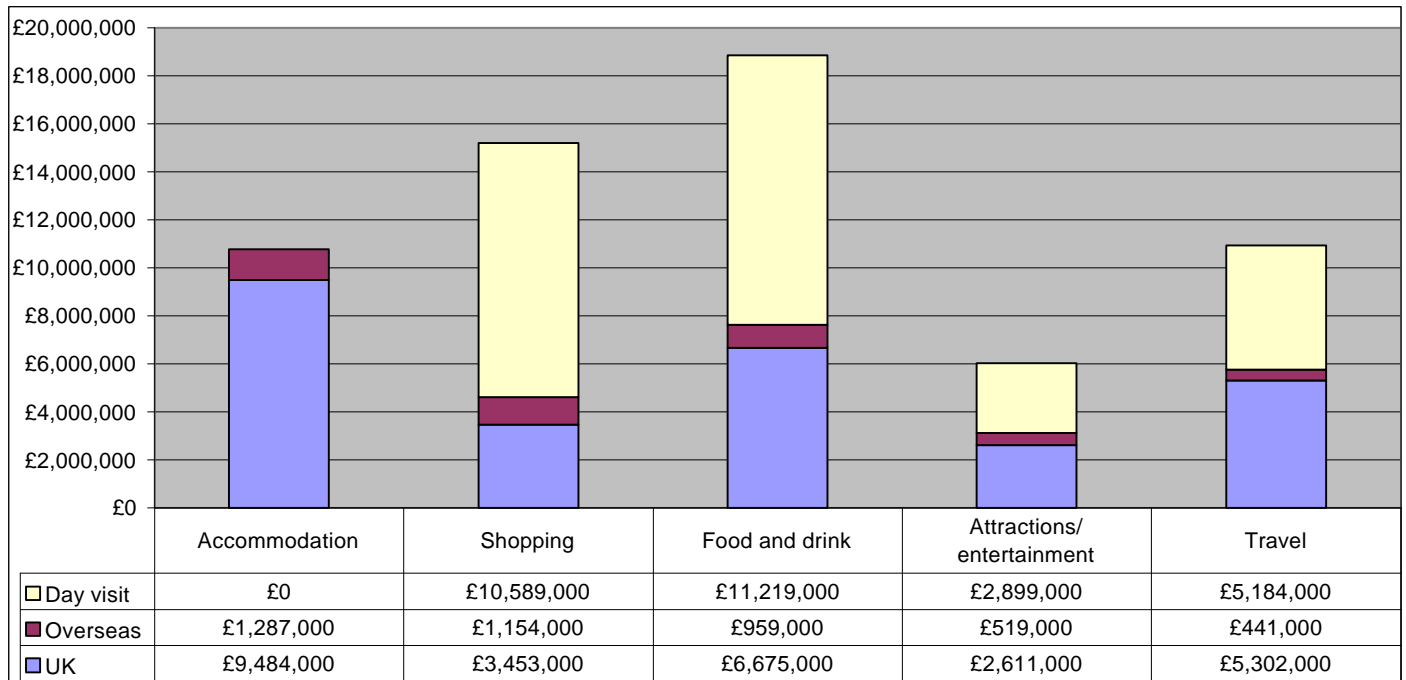


# Tewkesbury Briefing

## Day visits



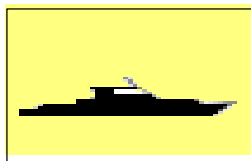
## Expenditure associated with trips



## Other tourism related spend



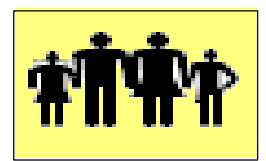
Second Homes  
£82,000



Boats  
£700,000



Static Vans  
£0



VFR  
£5,734,000

Apart from expenditure associated with the individual trips, some forms of activity also involve ongoing expenditure on the accommodation or result in additional spending by non visitors eg friends and relatives with whom the tourist is staying.

## Total employment related to tourism spending ( estimated actual )

	Staying tourists	Day visitors	Total
Direct	870	650	1,520
Indirect	133	66	199
Induced	42	28	70
<b>Total</b>	<b>1,045</b>	<b>744</b>	<b>1,789</b>
<b>Estimated number of FTE's</b>			<b>1,290</b>