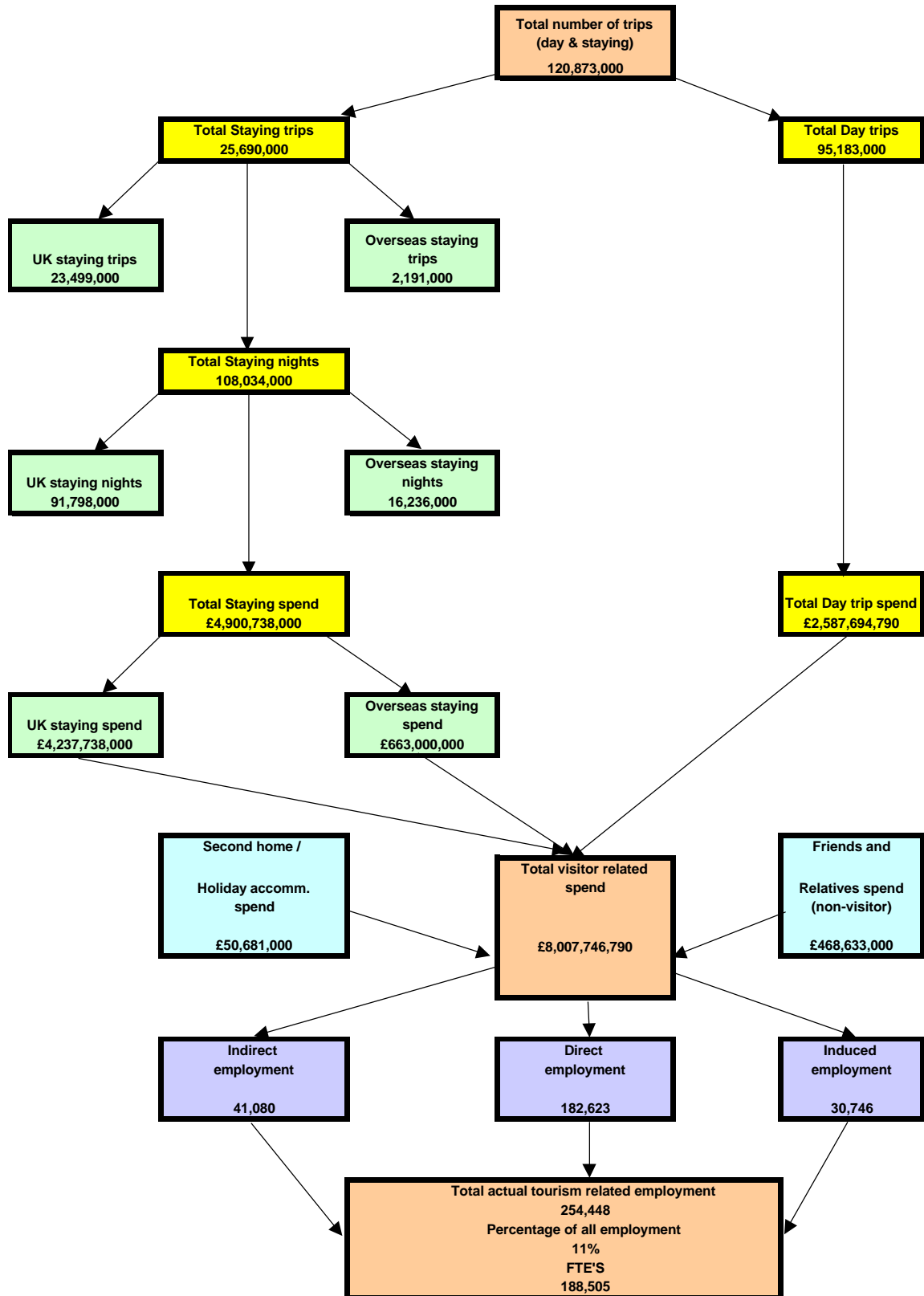


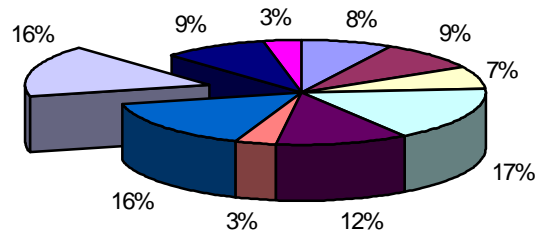
2. Tourism: The Regional Economic Overview

The South West Region: Facts at a glance

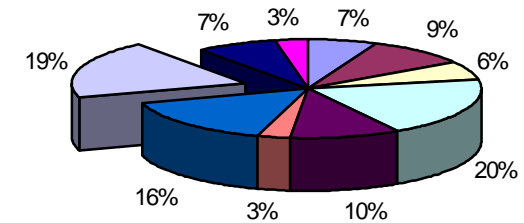


The South West Region: Staying visitors in context

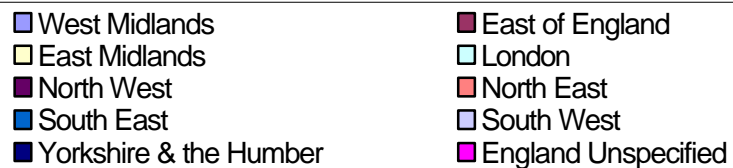
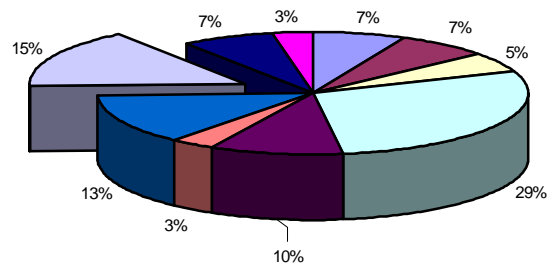
Trips



Nights



Spend



	Trips	Nights	Spend
West Midlands	12,530,000	37,000,000	£2,204,000,000
East of England	13,570,000	52,600,000	£2,246,000,000
East Midlands	10,560,000	34,600,000	£1,643,000,000
London	26,000,000	111,700,000	£9,083,000,000
North West	17,840,000	57,200,000	£3,226,000,000
North East	5,300,000	18,300,000	£1,038,000,000
South East	24,290,000	88,500,000	£4,294,000,000
South West	24,680,000	108,300,000	£4,928,000,000
Yorkshire & the Humber	14,020,000	42,300,000	£2,224,000,000
England Unspecified	5,250,000	17,600,000	£937,000,000
England (NOT ACTUAL)	154,040,000	568,100,000	£31,823,000,000

The South West Region: Staying visitors in detail

KEY FACTS:

- ***The South West region relies heavily on the domestic holiday market in terms of trips, nights and spend although it has witnessed a slight decrease in the number of trips in comparison to 2001. However, the number of nights and spend has increased.***
- ***The VFR sector is the most important to the South West in terms of the volume of trips and nights to the region but not with respect to tourism spend in the region.***
- ***Spending remains the highest amongst those visitors staying in serviced accommodation.***

Trips, nights & spend by accommodation (domestic tourists)

	Trips	Nights	Spend
Serviced	6,907,000	19,926,000	£1,631,577,000
Self catering	2,722,000	16,864,000	£775,259,000
Touring caravans /tents	1,714,000	9,779,000	£234,465,000
Static vans/holiday centres	1,898,000	10,814,000	£427,808,000
Group/campus	288,000	1,167,000	£76,157,000
Paying guest in private house	0	0	£0
Second homes	527,000	2,627,000	£124,352,000
Boat moorings	154,000	410,000	£12,578,000
Other	1,261,000	4,507,000	£169,429,000
Staying with friends and relatives	8,030,000	25,703,000	£786,115,000
Total	23,499,000	91,798,000	£4,237,738,000

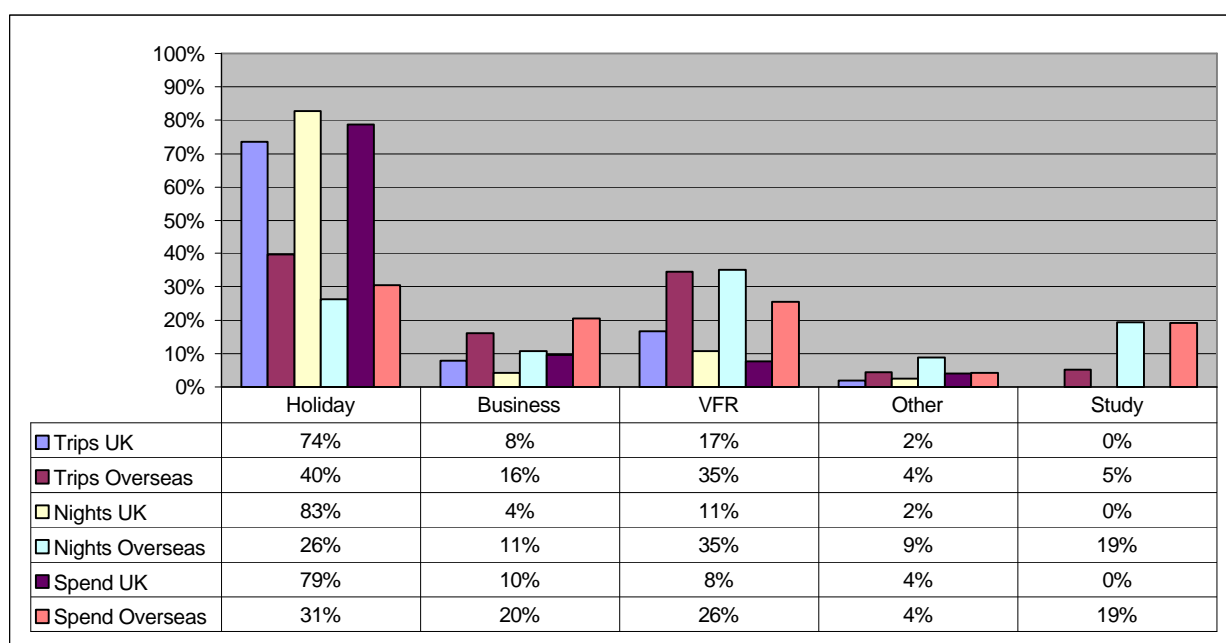
- Ø Three quarters of domestic staying trips made to the South West region involve staying with friends or relatives (34%), staying in serviced accommodation (29%) or self-catering accommodation (12%).
- Ø The largest proportions of domestic nights are spent staying with friends and relatives (28%) or in serviced accommodation (22%). However, the average number of nights spent per trip is highest in self-catering accommodation (6.2 nights) followed by touring caravans /tents (5.71 nights) and static vans/ holiday centres (5.70 nights).
- Ø The largest proportion of domestic visitor spend in the region was generated by those visitors staying in serviced accommodation (39%) which also generated the highest average spend per night of £81.88. Self-catering accommodation produced the highest average spend per trip figure of £284.81.

Trips, nights & spend by accommodation (overseas tourists)

	Trips	Nights	Spend
Serviced	890,000	3,203,000	£241,611,000
Self catering	68,000	929,000	£31,698,000
Touring caravans /tents	78,000	520,000	£11,851,000
Static vans/holiday centres	8,000	86,000	£1,283,000
Group/campus	71,000	998,000	£49,344,000
Paying guest in private house	116,000	2,122,000	£95,454,000
Second homes	48,000	723,000	£24,589,000
Boat moorings	0	0	£0
Other	56,000	125,000	£3,503,000
Staying with friends and relatives	856,000	7,526,000	£203,666,000
Total	2,191,000	16,236,000	£663,000,000

- Ø 80% of all overseas staying trips to the South West region were generated by visitors staying either in serviced accommodation, (41%), or with friends and relatives (39%).
- Ø 46% of all overseas staying visitor nights were generated by those staying with friends and relatives although the highest average length of stay was for overseas visitors staying as paying guests in private houses (18.29 nights).
- Ø Approximately two thirds of all overseas spending is from visitors staying in serviced accommodation or with friends and relatives. Serviced accommodation also produced the highest spend per night figure of £75.43 and the highest spend per trip was from those overseas visitors staying as paying guests in private houses (£822.88).

Trips, nights and spend by purpose



Trips, nights and spend by purpose (Domestic Tourists)

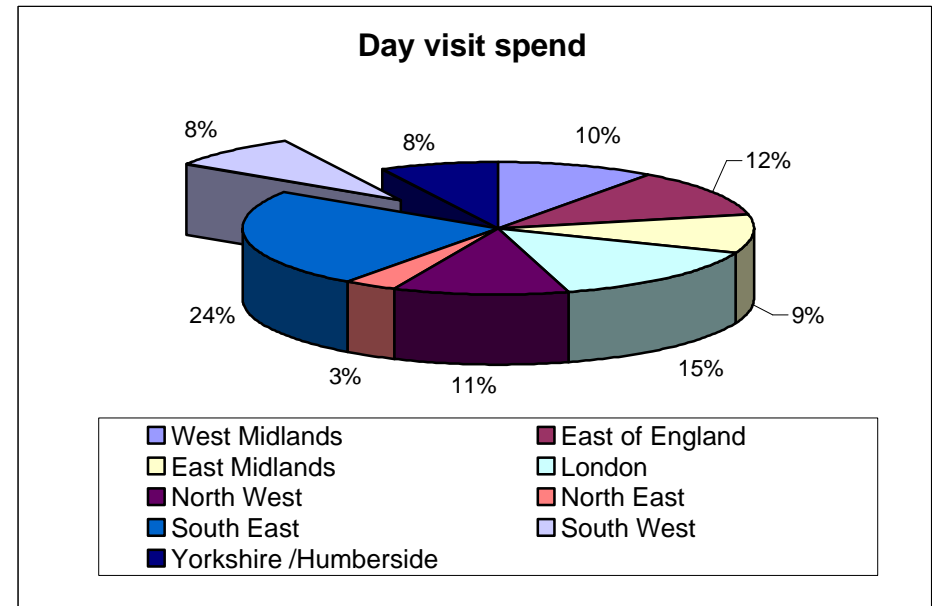
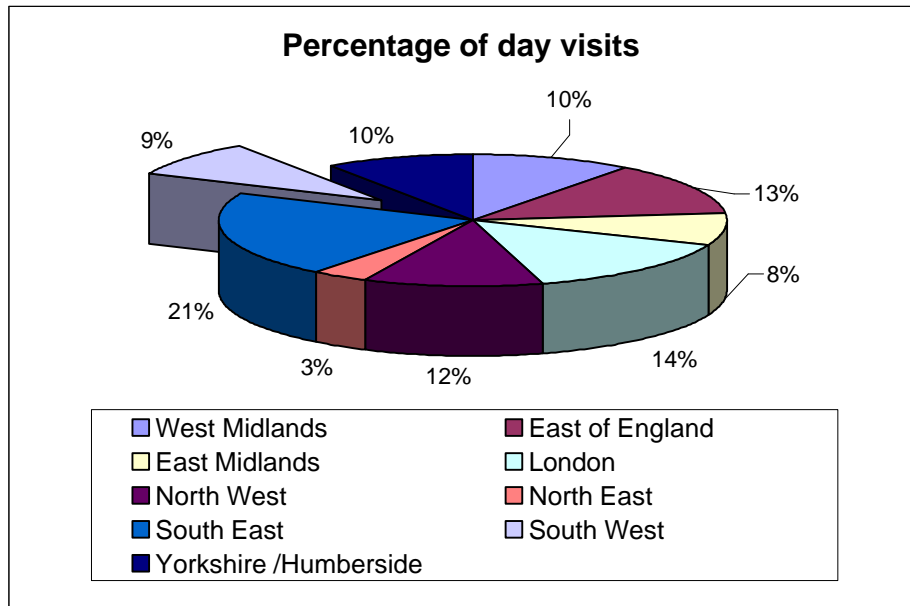
	Trips	Nights	Spend
Holiday	17,303,000	76,051,000	£3,340,116,000
Business	1,843,000	3,764,000	£403,489,000
VFR	3,928,000	9,774,000	£323,041,000
Other	424,000	2,208,000	£171,091,000
Study	0	0	£0
Total	23,499,000	91,798,000	£4,237,738,000

Trips, nights and spend by purpose (Overseas Tourists)

	Trips	Nights	Spend
Holiday	871,000	4,252,000	£202,505,000
Business	354,000	1,725,000	£135,892,000
VFR	756,000	5,699,000	£169,529,000
Other	95,000	1,428,000	£27,657,000
Study	112,000	3,134,000	£127,419,000
Total	2,191,000	16,236,000	£663,000,000

- Ø The South West region relies heavily on the domestic holiday market, with 74% of domestic trips, 83% of domestic nights and 79% of domestic spend being generated from this sector.
- Ø Overseas business and study trips combined account for 21% of overseas trips and account for a combined 39% of overseas spend.

The South West region: Day visits in context



	Trips	Spend
West Midlands	93,000,000	£2,550,000,000
East of England	120,000,000	£2,930,000,000
East Midlands	71,000,000	£2,370,000,000
London	130,000,000	£3,690,000,000
North West	106,000,000	£2,800,000,000
North East	31,000,000	£800,000,000
South East	194,000,000	£6,120,000,000
South West	79,000,000	£2,100,000,000
Yorkshire /Humberside	87,000,000	£1,900,000,000

The South West region: Day visits in detail

KEY FACTS:

- ***Day trips to urban areas around the South West region and the expenditure generated from these trips account for 55% of day visits in the region.***

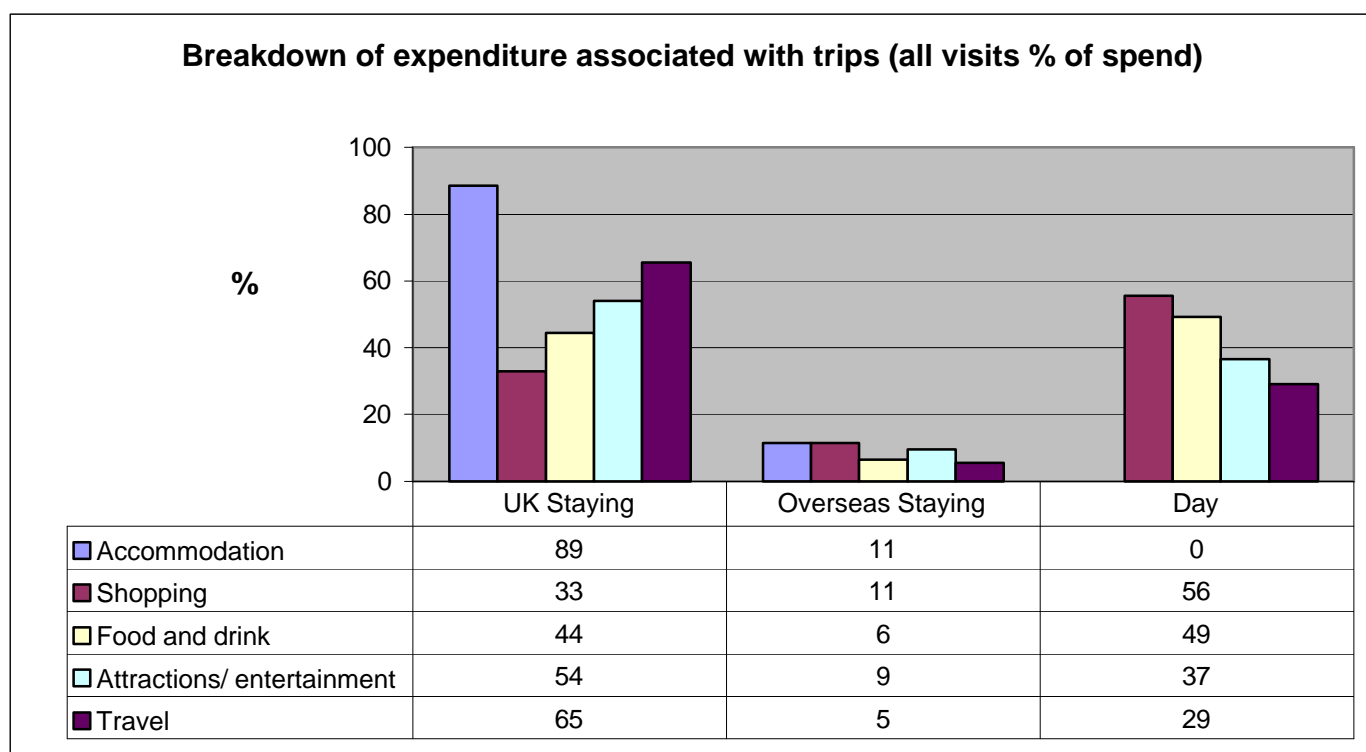
	Trips	Spend
Urban visits	52,610,000	£1,699,660,000
Countryside visits	31,237,000	£675,031,000
Coastal visits	11,336,000	£213,003,790
Total	95,183,000	£2,587,694,790

- ∅ Day trips to urban areas account for two thirds of all day trip expenditure.
- ∅ Day trips to the countryside around the South West accounted for 33% of trips and 26% of expenditure.
- ∅ Coastal day trips accounted for 12% and 8% of all day trips and spending in the region respectively.
- ∅ The average spend per trip for all day visits in the region was £27.19.

The South West Region: Expenditure in detail

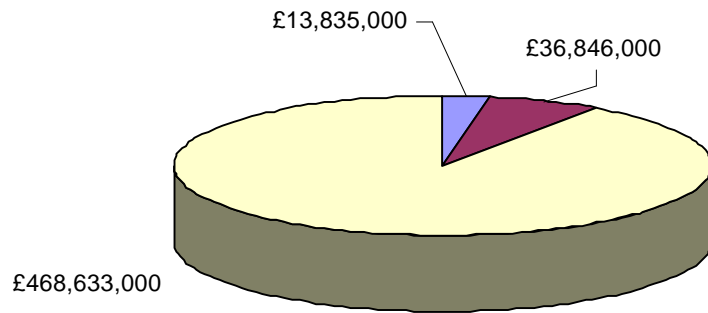
KEY FACTS:

- **Approximately three quarters of all tourism spend is spread between food and drink (29%), accommodation (24%) and shopping (22%).**
- **UK staying visitors generated 57% of all tourism spend in the region, day visits a further 34% and overseas visitors 9%.**
- **Overseas staying visitors generated 11% of accommodation expenditure.**
- **A further £468 million is generated as associated tourism spend by those visiting friends and relatives in the region. Apart from the actual visitor spend, this additional spend is generated by residents due to the fact that they were entertaining visiting friends and relatives.**



	UK staying	Overseas staying	Day visitors	TOTAL
Accommodation	£1,560,405,000	£200,344,000	£0	£1,760,749,000
Shopping	£533,066,000	£184,225,000	£897,292,000	£1,614,583,000
Food & drink	£952,676,000	£137,605,000	£1,055,359,000	£2,145,640,000
Attractions/entertainment	£455,205,000	£79,586,000	£307,655,000	£842,446,000
Travel	£736,384,000	£61,244,000	£327,389,000	£1,125,017,000
TOTAL	£4,237,737,000	£663,002,000	£2,587,695,000	£7,488,434,000

Other expenditure associated with tourism activity



Total additional expenditure =



The South West region: Employment in detail

KEY FACTS:

- ***Direct employment in businesses in receipt of visitor expenditure was highest in the catering sector, followed by the accommodation sector and retailing.***
- ***A total of 125,500 full time equivalent jobs (FTE's) are directly supported by visitor expenditure in the South West region equating to 182,623 actual jobs.***
- ***A further 63,005 full time equivalent jobs are supported indirectly or are induced – equivalent to 71,825 actual jobs.***
- ***A total of 188,505 full time equivalent jobs are supported (directly and indirectly) by tourism spending in the South West region – equivalent to 254,448 actual jobs.***

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

	Staying visitors	Day visitors	TOTAL
Accommodation	36,997	424	37,421
Retailing	8,505	10,257	18,763
Catering	20,830	19,556	40,386
Attractions/entertainment	9,082	5,226	14,308
Transport	4,435	1,759	6,194
Arising from non trip spend	8,428	0	8,428
Total Direct	88,278	37,222	125,500

Direct employment in businesses in receipt of visitor expenditure (Actual jobs)

	Staying visitors	Day visitors	TOTAL
Accommodation	54,755	628	55,383
Retailing	12,758	15,386	28,144
Catering	31,246	29,333	60,579
Attractions/entertainment	12,806	7,369	20,175
Transport	6,253	2,481	8,734
Arising from non trip spend	9,608	0	9,608
Total Direct	127,426	55,196	182,623

Total employment related to tourism spending (FTE's)

	Staying visitors	Day visitors	TOTAL
Direct	88,278	37,222	125,500
Indirect	26,353	9,682	36,035
Induced	22,926	4,044	26,970
TOTAL	137,557	50,948	188,505

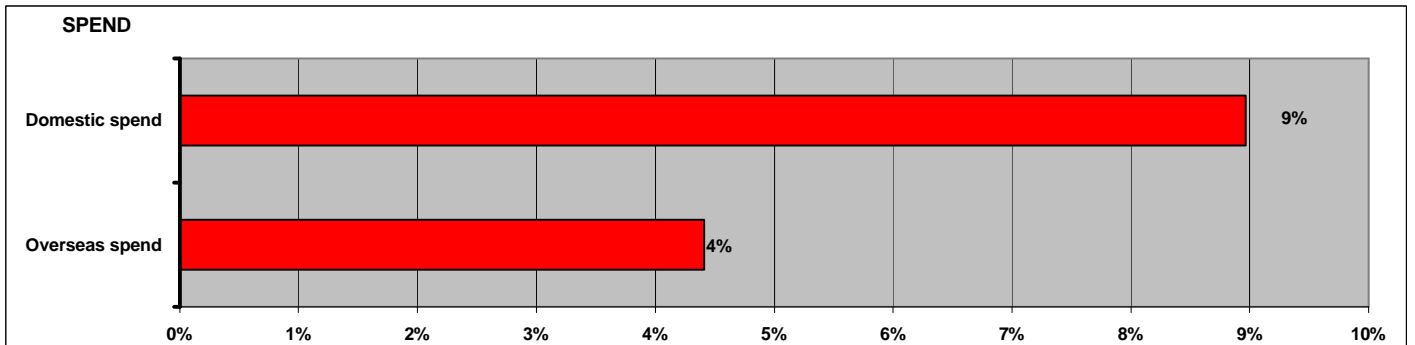
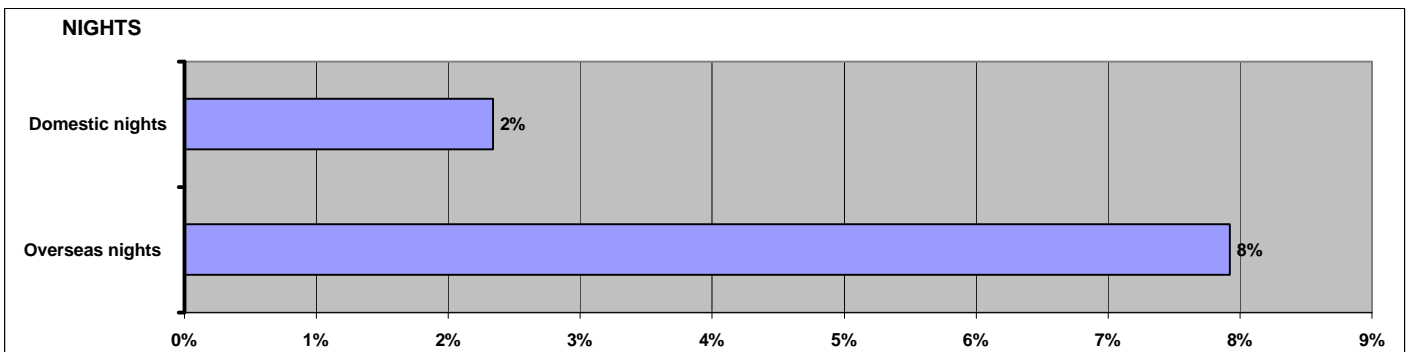
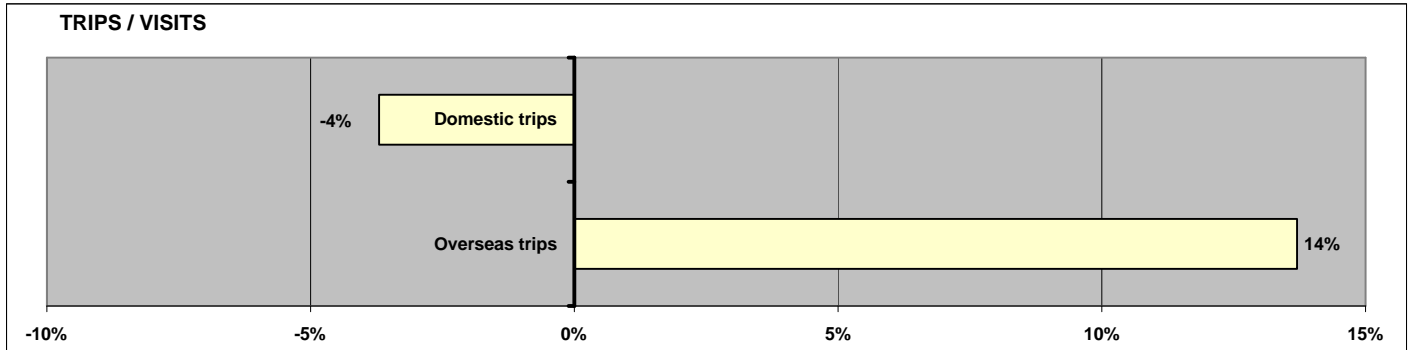
Total employment related to tourism spending (Actual)

	Staying visitors	Day visitors	TOTAL
Direct	127,426	55,196	182,623
Indirect	30,042	11,038	41,080
Induced	26,136	4,610	30,746
TOTAL	183,605	70,844	254,448

South west Summary Briefing 2003

Trend data - Change between 2001 and 2003

The trend data below is displayed in chart format showing the 2003 figures and the percentage increase/decrease against the base year of 2001. Actual figures for both 2001 and 2003 are shown at the bottom of the page. Day visits information is not included in this section as data for 2001 and 2003 is not strictly comparable. For a full explanation of this please refer to the FAQ's section of this report.



Key facts for comparison

	2001	2003	% difference
Domestic trips	24,400,000	23,499,000	-4%
Domestic nights	89,700,000	91,798,000	2%
Domestic spend	£3,889,000,000	£4,237,738,000	9%
Overseas trips	1,927,000	2,191,000	14%
Overseas nights	15,044,000	16,236,000	8%
Overseas spend	£635,000,000	£663,000,000	4%
Other tourism related spend	£549,938,000	£519,312,000	-6%
Tourism related jobs (Estimated actual)	307,032	254,448	-17%
% of employment supported by tourism	13%	11%	-2%

For more information on comparisons between 2001 and 2003 and trends analysis please see the FAQ's and Guidance Notes sections of this report.