

Volume and Value of Tourism

Global Tourism Solutions, National Forest Company



THE NATIONAL
FOREST

Introduction

The research

The National Forest Company (NFC) has commissioned annual volume and value of tourism studies since 2003, with the latest information in this paper relating to 2008. This includes statistics on tourism employment, visitor spending, visitor numbers and the extent of tourism accommodation in the area. This research enables the NFC to monitor visitor trends and the economic impact of tourism over time.

Why do it?

The development of The National Forest as a tourism destination and the growth of a new visitor economy have happened far quicker than expected. The NFC is working in partnership with a wide range of local authority tourism organisations, visitor attractions and accommodation providers to provide a focus for tourism development and marketing. This will be achieved through a 20-year Vision for The National Forest as a sustainable tourist destination and an accompanying five-year Action Plan (2009 - 2014). Regular monitoring of tourism impact underpins this vision, which supports strategic planning, development and investment decisions. Tourism impact monitoring also forms a key part of the broader socio-economic monitoring of the Forest's development, which is important in measuring the Forest's contribution to sustainable development.

Aims & objectives

- To monitor annual visitor numbers and spending for the Forest area.
- To assess the economic impact of tourism upon the area and the number of jobs created through it.
- To provide a common statistical basis for working with tourism partners, to plan for tourism development and visitor marketing.
- To provide comparative data on tourism trends.

The Project

Description

Volume and value research is undertaken by Global Tourism Solutions (UK) Ltd (GTS) using its Scarborough Tourism Economic Activity Monitor (STEAM) model. This is the model used across many regions including the East Midlands, allowing trend comparisons with other tourism destinations. The STEAM model quantifies the economic impact of tourism from both day and overnight visitors, and provides information on overall visitor numbers, spending and jobs created.

Approach

The STEAM model uses monthly data on accommodation bed stocks and occupancy rates, visitor footfall at visitor attractions, attendance at tourism events and Tourist Information Centre visitor figures. This information is collected by tourism destination management partnerships in the Leicestershire and Derbyshire parts of the Forest and by GTS in the Staffordshire area. The model uses postcode data to determine the destination area, so only venues inside The National Forest are included.

Timescales

Data is collected annually.

Budget

£3,877, including VAT.

Results

Outcomes

- **Tourism employment:** Tourism directly supported 4,422 jobs in 2008, representing a 12% growth in employment from 2003.
- **Visitor Spending:*** Visitor spending grew from £262.34m in 2003 to £287.12m in 2008, an increase of 9%. This includes expenditure (2008) on: accommodation (£17.24m), food and drink (£49.29m), recreation (£19.66m), shopping (£70.04m), transport (£26.88m) and indirect expenditure (£71.97). (Note: these individual figures exclude VAT).
- **Spending by category of visitor:*** The breakdown of spending by category of visitor (2008) comprised: serviced accommodation (£37.70m), non-serviced accommodation (£7.85m), staying with friends or relatives (£27.43m) and day visitors (£214.14m). Day visitors represent 75% of the total spend in the area, compared with 69% in 2003.
- **Visitor numbers:** The National Forest attracted 7.97m visitors in 2008, an increase of 18% from 2003 (6.77m). Of this, 93% (7.42m) were day visitors and 7% (0.55m) were overnight staying visitors.
- **Overnight visitors:** The percentage of overnight visitors has remained largely unchanged since 2003. Of the overnight visitors in 2008, 216,510 stayed in serviced accommodation; 26,980 stayed in non-serviced accommodation; and 303,030 stayed with friends or relatives.
- **Overnight accommodation:** An analysis of bed stock for visitors showed a maximum of 3,607 beds in The National Forest in 2008, representing a rise of 16% since 2003.

* These statistics have been indexed annually, to reflect the true increase in expenditure.

Applications

- The research provides the National Forest Tourism Partnership with strategic data for tourism development planning and visitor marketing.
- Baseline data supports commercial capital investment decisions in tourism projects and tourism funding applications.
- The data helps to inform the production of local tourism budgets.
- It also provides evidence to inform local planning policy and support tourism planning applications.

Further information

Dissemination

- NFC publicity and press releases.
- The NFC's Forest Scene newsletter.
- Sharing of data with tourism partners, principally through the National Forest Tourism Partnership.
- NFC research review seminar 2010.

Links to published work

National Forest STEAM results (2008). Global Tourism Solutions.

East Midlands Tourism oversees the STEAM stats for the region and published this on its website: www.eastmidlandstourism.co.uk/text.asp?PageId=10

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