



ECONOMIC IMPACT OF TOURISM WORCESTERSHIRE 2002-2004



THE VOLUME AND VALUE OF VISITORS TO WORCESTERSHIRE 2002 – 2004

EVENTS AND FACTORS AFFECTING VOLUME AND VALUE IN WORCESTERSHIRE

Due to the nature of the Cambridge Model it is important to put into context the data used and factors that may have affected this data during the specific year in question. Below is a summary of some of the events and factors that occurred during the period 2002-2004 worldwide, in the UK in Worcestershire and the West Midlands both positive and negative.

Worldwide

Foot and Mouth Outbreak 2001 and the Terrorist attacks on September 11th in New York continue to affect the Tourism industry in the UK over the next year effecting 2002 visitor figures.

The Iraq war – American and British presence continues in Iraq

The War on Terror – Western targets continue to be attacked worldwide of note the Madrid train bombings in March 2004.

Consequences of the above meant tourists were nervous about flying and visiting areas with potential terrorist targets which included the British Isles.

In 2003 Britain witnessed a hot summer - the sunniest since 1995 and the 2nd driest since 1766: July UKTS showed that the regions with major urban conurbations suffered as it was too hot for city breaks and day trips to urban destinations.

The Rugby World Cup autumn 2003

The Olympic games held in Athens in August 2004

European Football Championships held in Portugal in June 2004

60th Anniversary of D-Day celebrations held in France in June 2004

Quite often when a major event takes place throughout the world for example the World Cup in 2003 visitor attractions and destinations see a decline in visitors as visitors like to enjoy widely televised events and often stay closer to home.

Britain and the UK

The £ has experienced a relatively strong few years against the Euro making Europe relatively cheap for British holidaymakers. Low cost airlines were at the peak of popularity – the Heart of England in particular affected due to good access to carriers and airports.

Worcestershire and the West Midlands Region

Birmingham Bullring Shopping Centre opens in 2003 and proves a popular shopping destination for the region.

Worcester Rugby Club promoted to the Premiership in 2004 season.

Continuing success of Worcestershire County Cricket Club.

Festival and events held in a county/district also have an impact on visitor volume and value.

Many other factors affect the outputs of the Cambridge Model, for example population statistics can affect the number of visitors coming to an area to visit friends & relatives and visits to attraction figures have an impact on the day visitor market in particular.

POPULATION STATISTICS

	2001 Census Data	1991 Census Data
WORCESTERSHIRE	542,107	539,000
BROMSGROVE	87,837	85,000
MALVERN HILLS	72,172	74,000
REDDITCH	78,807	77,000
WORCESTER CITY	93,653	95,000
WYCHAVON	112,957	112,000
WYRE FOREST	96,981	96,000

Source; Office of National Statistics Census statistics

VISITOR ATTRACTION NUMBERS

The following is a list of some of the main attractions in Worcestershire whose visitor numbers have been used as one of the inputs to generate the volume and value of visitors.

Unfortunately due to confidentiality of data a full breakdown of figures is not available for publication.

ATTRACTIONS IN WORCESTERSHIRE		
Almonry (TIC) Evesham	Hanbury Hall	Webbs of Wychbold
Arrow Valley Country Park	Jinney Ring Craft Centre	West Midland Safari Park
Avoncroft Museum of Buildings	Malvern Hills	Witley Court
Bodenham Arboretum	Malvern TIC and Priory	Worcester Cathedral
Broadway Tower	Pershore Abbey	Worcester City Museum & Art Gallery
Bromsgrove Museum	Royal Worcester Porcelain	Worcester TIC/Guildhall
Clent Hills	Severn Valley Railway	Worcester Woods Country Park
Croome Landscape Park	The Commandery	Wyre Forest Visitor Centre
Droitwich TIC/Heritage Centre	Waseley Hills	
Forge Mill Needle Museum	Weavers Wharf Kidderminster	



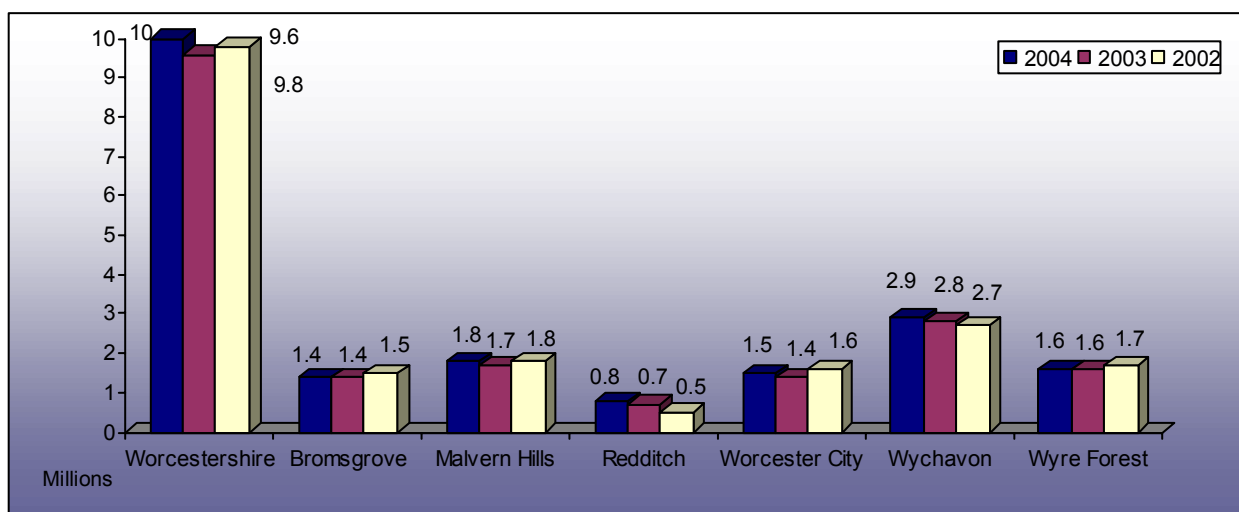
**VOLUME OF VISITORS
WORCESTERSHIRE
2002-2004**

1.0 VOLUME OF VISITORS TO WORCESTERSHIRE

The table below shows a breakdown of the number of visitors to Worcestershire from 2002 – 2004. The volume of visitors over the course of the three year period remained relatively constant with a small decline in 2003.

This trend was reflected across the 6 districts of Worcestershire with the exception of Redditch and Wychavon who saw a steady increase in the volume of visitors over the three years.

ALL VISITORS TO WORCESTERSHIRE (Millions)			
	2004	2003	2002
WORCESTERSHIRE	10	9.6	9.8
BROMSGROVE	1.4	1.4	1.5
MALVERN HILLS	1.8	1.7	1.8
REDDITCH	0.8	0.7	0.5
WORCESTER CITY	1.5	1.4	1.6
WYCHAVON	2.9	2.8	2.7
WYRE FOREST	1.6	1.6	1.7



The decline of visitors at a county level in 2003 reflected a national and regional trend. The following table shows United Kingdom Tourism Survey (UKTS) trends for the past three years a main driver of the Cambridge Model.

United Kingdom Tourism Survey (domestic visitors) (Millions)			
	2004	2003	2002
ENGLAND	***	121	135
HEART OF ENGLAND	13.1*	10.8	11.8

*****Unpublished** data in 2004 – in order for statistical reliability in the Cambridge Model a predicted figure has been used as an average. *Heart of England also a predicted figure for 2004.

1.01 OVERNIGHT VISITORS

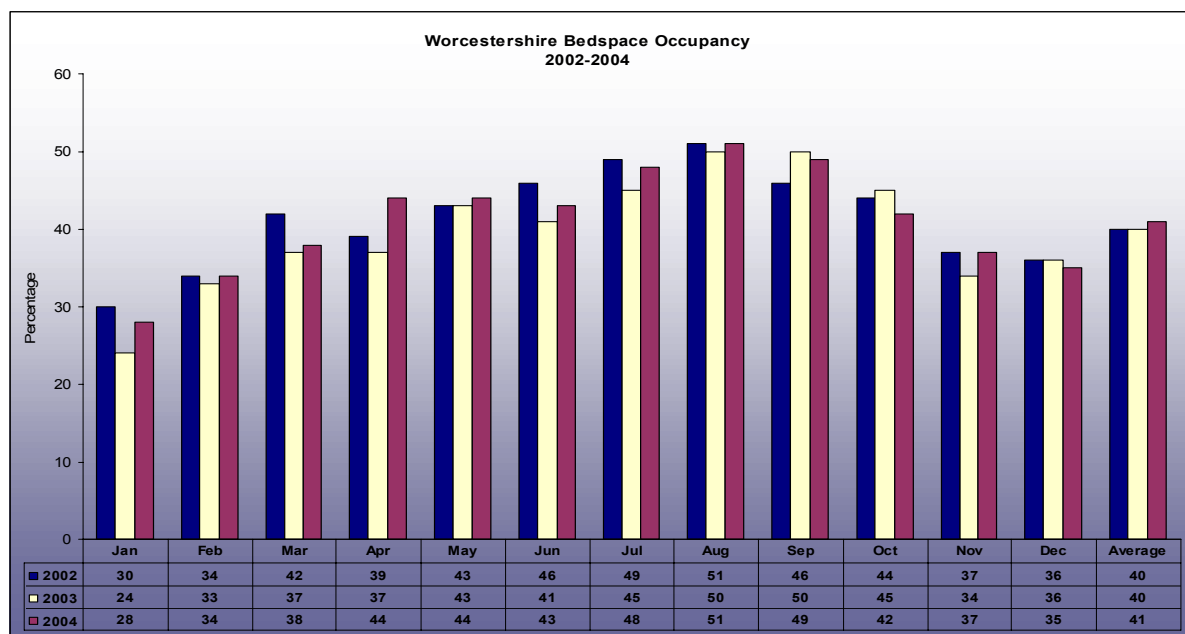
Overnight visitors are defined as visitors who spend one or more nights in Worcestershire.

This sector of the market includes those staying with friends and family as well as those using commercial accommodation.

Application of occupancy levels to known stock provides estimates of the number of visits or trips to the County, a trip being any length of time stay away from home.

OVERNIGHT VISITORS TO WORCESTERSHIRE (Millions)			
	2004	2003	2002
WORCESTERSHIRE	1.3	1.3	1.2
BROMSGROVE	0.2	0.2	0.2
MALVERN HILLS	0.3	0.3	0.3
REDDITCH	0.1	0.1	0.1
WORCESTER CITY	0.1	0.2	0.1
WYCHAVON	0.4	0.4	0.3
WYRE FOREST	0.2	0.2	0.2

The Worcestershire overnight visitor market remained relatively constant over the three year period in question at a county level. This may be due to the accommodation stock in the area remaining at the same or similar levels.



The chart above shows a breakdown of Worcestershire bedspace occupancy levels over the period 2002 – 2004. Average bedspace occupancy has risen slightly in 2004 when compared to 2002 and 2003.

1.02 DOMESTIC AND OVERSEAS OVERNIGHT VISITORS TO WORCESTERSHIRE

The proportions of domestic and overseas visitors to Worcestershire are shown in the table below, at a county level the number of overseas visitors rose to 10% in 2003 from 8% in 2002. The majority of districts followed this pattern with a slight rise in 2003 and slight fall in 2004.

	2004	2003	2002
WORCESTERSHIRE			
Domestic	92%	90%	92%
Overseas	8%	10%	8%
BROMSGROVE			
Domestic	92%	90%	91%
Overseas	8%	10%	9%
MALVERN HILLS			
Domestic	95%	91%	94%
Overseas	5%	9%	6%
REDDITCH			
Domestic	92%	89%	90%
Overseas	8%	11%	10%
WORCESTER CITY			
Domestic	91%	88%	89%
Overseas	9%	12%	11%
WYCHAVON			
Domestic	94%	90%	92%
Overseas	6%	10%	8%
WYRE FOREST			
Domestic	94%	92%	94%
Overseas	6%	8%	6%

The rise in overseas visitors in the Cambridge Model during 2003 reflected the trend at a regional level. The table below shows the number of overseas visitors to the Heart of England Region over the three year period.

International Passenger Survey (Millions)			
	2004	2003	2002
HEART OF ENGLAND	1,779	1,910	1,834

2002 was still recovering from the effects of the September 11th attacks with overseas visitors reluctant to travel; at a national level 2001/02 season witnessed a 12% drop in visitors when compared with the previous year. 2003 began to see a recovery with overseas visitors returning, this combined with a hot summer in the UK saw overseas visitor numbers rise. However, 2004 witnessed more terrorist attacks this time in mainland Europe (Madrid) and an escalation in the war with Iraq.

1.03 DAY VISITORS TO WORCESTERSHIRE

Day visitors are defined as visitors who start their journey from home outside of the County and return there on the same day. It includes independents and groups.

In the case of a destination such as Worcestershire, it is not surprising to find that all day visitors are UK residents.

DAY VISITORS TO WORCESTERSHIRE (Millions)			
	2004	2003	2002
WORCESTERSHIRE	8.6	8.3	8.6
BROMSGROVE	1.2	1.2	1.3
MALVERN HILLS	1.5	1.4	1.5
REDDITCH	0.7	0.6	0.4
WORCESTER CITY	1.4	1.2	1.5
WYCHAVON	2.5	2.4	2.4
WYRE FOREST	1.4	1.4	1.5

An estimate of the number of day visitors is made by using the ratio of resident to non-resident visitors to all attractions, numbers of visitors to attractions, local population; the distance from other population centres and other sources of day visitor behaviour based upon the 2002 United Kingdom Day Visitor Survey.

In 2004 approximately 10 million visitors came to Worcestershire, comprising around 8.6 million day visitors, showing that Worcestershire has a market profile of primarily day visitors. This is also substantiated by the 2005 Worcestershire County Visitor Survey where out of a sample of 1,645 visitors 56% were found to be on a day visit.

Certain Districts attract higher proportions of day visitors than others, for example Wychavon with 2.5 million day visitors in 2004. This could be because of a number of reasons, for example the make up of visitor attractions in the area, Wychavon incorporates Broadway and popular specialist shopping outlets such as the Jinney Ring Craft Centre and Webbs of Wychbold, these attractions are perfect for the day visitor with a travel time of 30 minutes to 2 hours, the districts in question are easily accessible to Birmingham and have good transport and road links to the M5.

VISITOR FLOW

1.04 NIGHTS SPENT IN WORCESTERSHIRE

Research into the County's visitor markets has shown that different sorts of visitors stay for different lengths of time and that their levels of expenditure vary according to the length and purpose of visit.

NIGHTS SPENT IN WORCESTERSHIRE (Millions)			
	2004	2003	2002
WORCESTERSHIRE	4.0	3.9	3.5
BROMSGROVE	0.5	0.5	0.4
MALVERN HILLS	0.8	0.9	0.8
REDDITCH	0.3	0.3	0.3
WORCESTER CITY	0.5	0.4	0.4
WYCHAVON	1.3	1.2	0.9
WYRE FOREST	0.6	0.6	0.7

Taking the days spent by day visitors together with the days (nights) spent by those staying overnight provides an overall figure for visitor flows. The 10 million visitors to Worcestershire spent approximately 4.0 million nights and 12.6 million days in Worcestershire.

The breakdown of the visitor market by trips and days spent by visitors in Worcestershire is shown below along with comparisons to the West Midlands Region.

Total Visitors to Worcestershire – Trips and Days				
	Trips made to Worcestershire	<i>Trips made to the West Midlands Region</i>	Days Spent in Worcestershire	<i>Days Spent in the West Midlands Region</i>
Day Visitors	8.6 Million	<i>92.5 Million</i>	8.6 Million	<i>92.5 Million</i>
Overnight Visitors	1.4 Million	<i>13.2 Million</i>	4 Million	<i>37.2 Million</i>
TOTAL	10 Million	<i>106 Million</i>	12.6 million	<i>130 Million</i>

Please note that the West Midlands region covers in the counties of Herefordshire, Shropshire, Staffordshire, Warwickshire, West Midlands Metropolitan Area and Worcestershire.



**VALUE OF TOURISM
WORCESTERSHIRE
2002-2004**

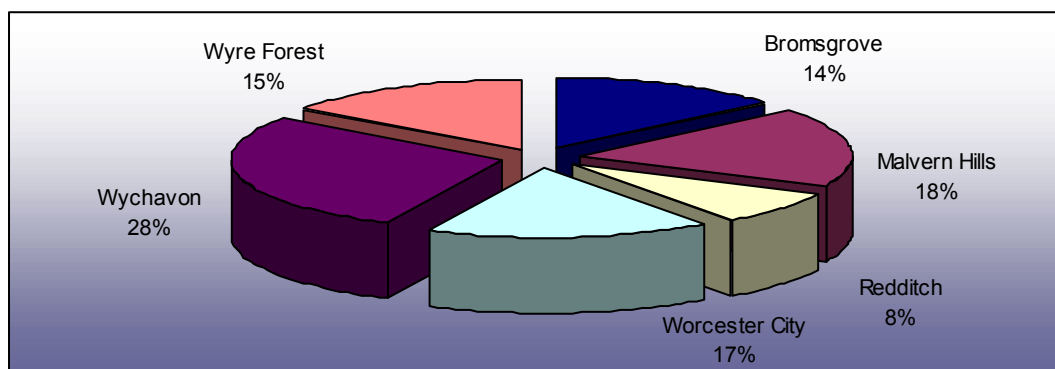
2.0 VALUE OF TOURISM IN WORCESTERSHIRE

Having established the volume of visitor days to Worcestershire, it is possible to then estimate the total value of tourism expenditure. The per head expenditure data is generated by national tourism data (UKTS/IPS) disaggregated down to regional level.

VALUE OF TOURISM IN WORCESTERSHIRE (£ Millions)			
	2004	2003	2002
WORCESTERSHIRE	£370	£359	£349
BROMSGROVE	£53	£53	£54
MALVERN HILLS	£65	£69	£67
REDDITCH	£31	£29	£21
WORCESTER CITY	£63	£53	£58
WYCHAVON	£104	£101	£92
WYRE FOREST	£54	£54	£57

The value of tourism in Worcestershire as a whole over the period 2002-2004 has seen a steady increase from £359 million in 2002 to £370 million in 2004 this is despite the slight fall in visitors in 2003.

The Chart below shows the make up of visitor spending in Worcestershire, visitors to Wychavon contribute over a quarter (28%) of the county's tourism spend.



The following table shows United Kingdom Tourism Survey (UKTS) trends for the past three years, a main driver of the Cambridge Model.

United Kingdom Tourism Survey (domestic visitors) (£ Millions)			
	2004	2003	2002
ENGLAND	***	£20.5	£20.7
HEART OF ENGLAND	£2.0*	£1.6	£1.5

*****Unpublished** data in 2004 – in order for statistical reliability in the Cambridge Model a predicted figure has been used as an average. *Heart of England also a predicted figure for 2004.

2.01 SPENDING BY OVERNIGHT VISITORS

The overnight visitor market to Worcestershire contributed 37% of the total tourism value in the county in 2004; however the amount spent by overnight visitors declined significantly in 2003 when compared with 2002. This decline followed the downward trend shown nationally but was more marked in Worcestershire.

VALUE OF OVERNIGHT VISITORS IN WORCESTERSHIRE (£ Millions)			
	2004	2003	2002
WORCESTERSHIRE	£137	£141	£125
BROMSGROVE	£18	£20	£17
MALVERN HILLS	£28	£34	£29
REDDITCH	£12	£11	£10
WORCESTER CITY	£20	£17	£15
WYCHAVON	£42	£41	£33
WYRE FOREST	£17	£18	£21

2.02 SPENDING BY DAY VISITORS

Day visitor spending in Worcestershire as a whole saw a slight decline in 2003 following the visitor volume pattern, however 2004 saw a return to pre 2002 levels with an increase of £15 million on 2003.

VALUE OF DAY VISITORS IN WORCESTERSHIRE (£ Millions)			
	2004	2003	2002
WORCESTERSHIRE	£233	£218	£224
BROMSGROVE	£35	£33	£37
MALVERN HILLS	£37	£36	£38
REDDITCH	£19	£18	£11
WORCESTER CITY	£43	£36	£43
WYCHAVON	£62	£59	£59
WYRE FOREST	£37	£36	£36

Each district with the exception of Redditch, Wychavon and Wyre Forest followed the same pattern as the county. Redditch witnessed a steady increase in day visitor spend over the three years, Wychavon and Wyre Forest both remained static until a slight rise in 2004.

2.03 DISTRIBUTION OF VISITOR SPENDING

DISTRIBUTION OF VISITOR SPENDING (£ Millions) <u>2004</u>						
	Accommodation	Retail	Catering	Entertainment	Transport	Total
WORCESTERSHIRE	£43	£113	£124	£41	£49	£370
BROMSGROVE	£6	£17	£18	£6	£7	£53
MALVERN HILLS	£9	£17	£22	£8	£9	£65
REDDITCH	£4	£10	£10	£3	£4	£31
WORCESTER CITY	£6	£23	£21	£6	£7	£63
WYCHAVON	£13	£29	£35	£12	£15	£104
WYRE FOREST	£5	£18	£18	£6	£7	£54

DISTRIBUTION OF VISITOR SPENDING (£ Millions) <u>2003</u>						
	Accommodation	Retail	Catering	Entertainment	Transport	Total
WORCESTERSHIRE	£46	£106	£119	£40	£48	£359
BROMSGROVE	£7	£16	£18	£6	£7	£53
MALVERN HILLS	£11	£18	£22	£8	£10	£69
REDDITCH	£3	£9	£9	£3	£4	£29
WORCESTER CITY	£6	£19	£17	£5	£6	£53
WYCHAVON	£14	£27	£34	£12	£14	£101
WYRE FOREST	£5	£17	£19	£6	£7	£54

DISTRIBUTION OF VISITOR SPENDING (£ Millions) <u>2002</u>						
	Accommodation	Retail	Catering	Entertainment	Transport	Total
WORCESTERSHIRE	£42	£108	£111	£34	£54	£349
BROMSGROVE	£6	£18	£17	£5	£8	£54
MALVERN HILLS	£10	£18	£21	£7	£12	£67
REDDITCH	£3	£7	£6	£2	£3	£21
WORCESTER CITY	£5	£22	£18	£6	£7	£58
WYCHAVON	£11	£27	£30	£9	£15	£92
WYRE FOREST	£7	£16	£18	£6	£10	£57

Please note that spending in specific categories is only that spent by visitors/tourists to an area and not a total figure for the county as a whole i.e. not by residents of a county.