

# visitgloucestershire

The Visit Gloucestershire Visitor Economy Roadmap is designed to unlock the hidden potential of Gloucestershire's tourism sector. Worth £966 million a year to the County in 2019, and despite the impact of COVID-19, Gloucestershire is well positioned to optimise the benefits of a reset travel and tourism industry - bringing new jobs and businesses, an improved quality of life for residents and a place that is well looked after for all to enjoy. Visit Gloucestershire, the County's tourism development body, forecasts that visitor spending will grow 17% over that 2019 baseline, reaching £1.13 billion by 2030, supporting the creation of some 2,200 jobs and 150 new businesses. But the strategy is really about achieving more sustainable growth – by encouraging our existing visitors to stay longer, by spreading the benefits of tourism to all parts of the county, and by making stronger and beneficial connections to other policy areas, such as transport, zero carbon, food and drink, digital, skills and business support. For many years Gloucestershire has not delivered on its full potential – partly as a result of its geography but also because it has not always appreciated the value of working together. Recovery from the COVID-19 pandemic demands a new approach to underpin future success. The development of the Visit Gloucestershire strategy has been supported by a wide range of partners drawn from the public, private and third sectors, all of whom have freely contributed their knowledge and insight to help redefine a different looking future.

COVID-19 has had a devastating impact on the UK's tourism industry and those who work in it. The impact on turnover was much more significant for travel and tourism businesses than for other industry sectors (with UK tourism businesses seeing just 26% of business volume in May 2020 when compared with February 2020 while the equivalent for other industries was 74%). In the second quarter of 2020, employment in UK accommodation fell by 21.5% compared with the same period in 2019 and in the travel and tourism industries overall, the age group hardest hit by a fall in employment was people aged 16 to 24 years.

However, once hospitality businesses were able to reopen in 2020, the South West of England saw the highest rates of occupancy (72% in August 2020) – as a result of a strong rise in domestic visits. Visit Britain's sentiment tracker shows that confidence in, and intention to book, a domestic break in the UK is growing.

Gloucestershire's visitor profile has historically been largely domestic and the fact that it does not rely as heavily as some regions on international visitors may be a strength in the short to medium term. For example, the South West remains the leading destination in England for a domestic overnight trip during spring (27% share of next intended trips) and summer (24%) in 2021. We see the 2021 season as providing a sea-change - providing that vaccination and lockdown easing plans remain on track.

The staycation trend coupled with a greater extent of local and VFR related tourism, presents an opportunity for Gloucestershire during 2021 to bounce back stronger.

For example, 66% of Gloucestershire residents who responded to our survey say that they will spend more time going on days out or short breaks in Gloucestershire than they did before the COVID-19 pandemic.

Globally, research by Euromonitor in January 2021 found that consumers' top travel preferences now include relaxation; a safe destination; nature and outdoor activities; quality of dining and food; immersion in local culture and a family friendly offer. This also links to the benefits of accessing green spaces in terms of mental health and wellbeing.

Recovery activity will be coordinated at a Gloucestershire level but delivered by a network of delivery partners on the ground including LDOs, supported in turn by Growth Hubs, District Councils and DMOs. The purpose of the actions in this roadmap to recovery are to add value to what is being delivered at local level. It has been informed by the stakeholder surveys undertaken as part of the development of this document. Actions will be subject to detailed review at Action Planning stage but could include: Gaining a full understanding of the effects of the pandemic on Gloucestershire's Visitor Economy, monitoring re-opening of all types of businesses and during 2021 and 2022 reporting quarterly on the performance of the industry;

Visit Gloucestershire closely connects to and supports a wider set of policies developed by our partners including:

- the LEP COVID-19 recovery plan
- the Build Back Better plan
- the County's medium term Vision 2030 and longer term 2050 Plan

The first step in creating a county-wide Recovery Roadmap has been to develop a detailed understanding of the current visitor economy 'landscape' and the assets on which it depends. The scale of the visitor economy in Gloucestershire is extensive and it is an important driver for broader economic activity in the county, creating a significant number of jobs as well as opportunities for innovation and entrepreneurship.

Prior to the COVID-19 pandemic, the county attracted around 23 million visits a year, whose collective annual spend totalled almost £1 billion. The county had well over 400 visitor attractions of many different types. There were over 1,350 places to stay. Around 850 businesses in the formal visitor economy employed almost 13,000 people.

We now look forward to working with all our partners to deliver activities that benefit the people who love living and working in, and visiting, Gloucestershire.

