



destination**research**
delivering results : measuring what matters

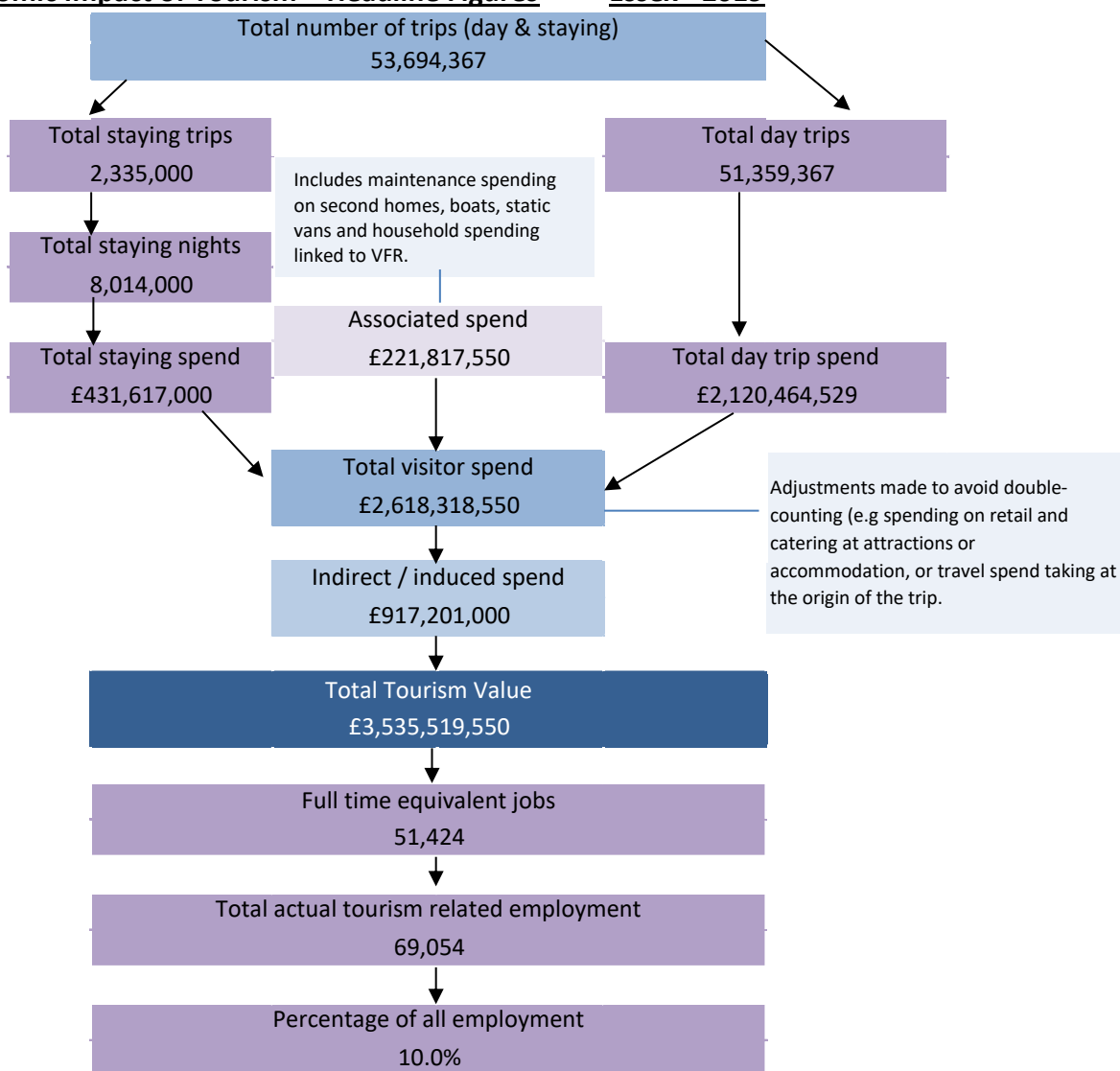


Economic Impact of Tourism

Essex - 2019

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Economic Impact of Tourism – Headline Figures Essex - 2019

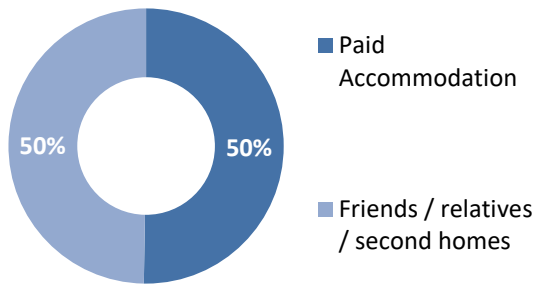


Economic Impact of Tourism – Year on year comparisons

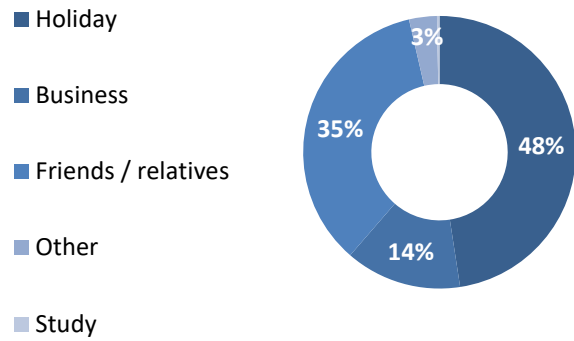
| <u>Day Trips</u> | 2018 | 2019 | Annual variation |
|------------------------|-----------------------|-----------------------|------------------|
| Day trips Volume | 53,106,003 | 51,359,367 | -3% |
| Day trips Value | £2,012,921,488 | £2,120,464,529 | 5% |
| <u>Overnight trips</u> | | | |
| Number of trip | 2,406,000 | 2,335,000 | -3% |
| Number of nights | 7,932,000 | 8,014,000 | 1% |
| Trip value | £423,756,000 | £431,617,000 | 2% |
| Total Value | £3,402,685,150 | £3,535,519,550 | 4% |
| Actual Jobs | 66,318 | 69,054 | 4% |

| | 2018 | 2019 | Variation |
|-------------------------------------|----------|----------|-----------|
| Average length stay (nights x trip) | 3.30 | 3.43 | 4.1% |
| Spend x overnight trip | £ 176.12 | £ 184.85 | 5.0% |
| Spend x night | £ 53.42 | £ 53.86 | 0.8% |
| Spend x day trip | £ 37.90 | £ 41.29 | 8.9% |

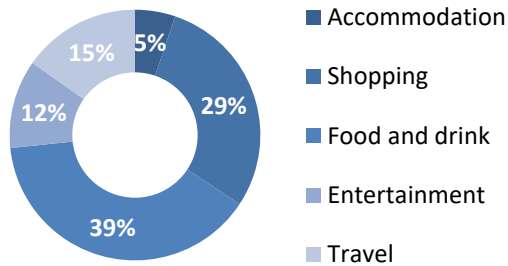
Type of Accommodation



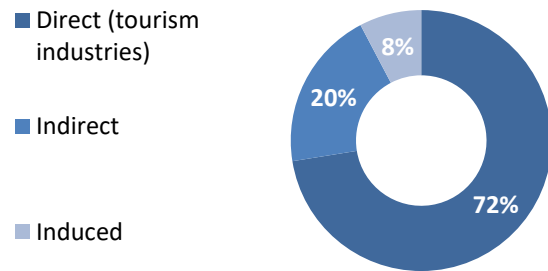
Trips by Purpose



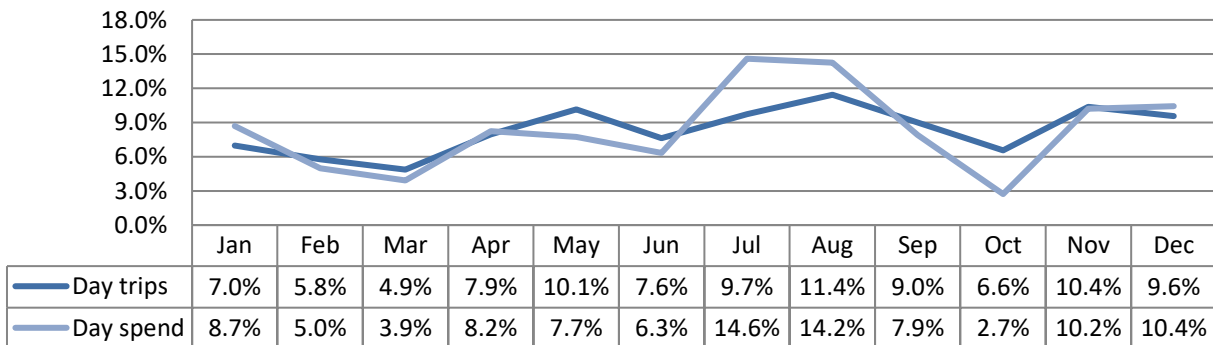
Breakdown of expenditure



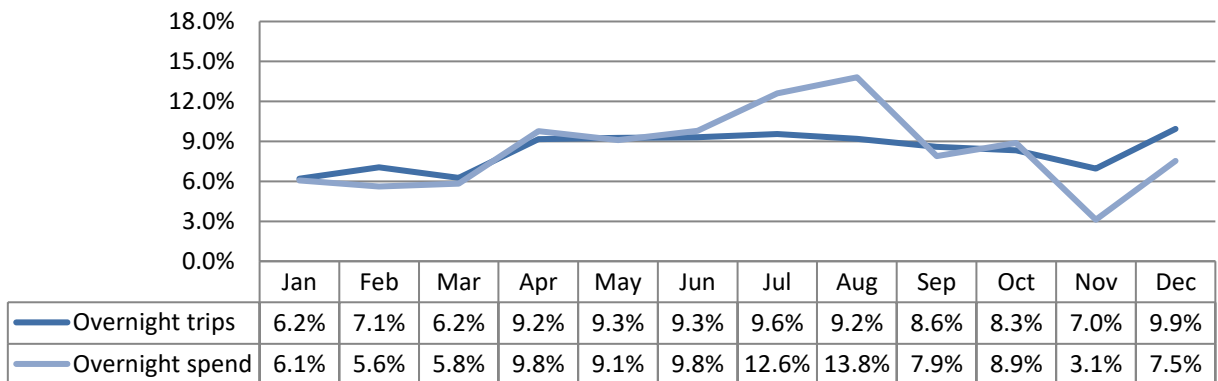
Type of employment



Seasonality - Day visitors (East of England)



Seasonality - Overnight visitors (East of England)



Contextual analysis

INTRODUCTION

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2019 and provides comparative data against previously published data. The results are derived using the Cambridge Economic Impact Model under licence by Destination Research Ltd based on the latest data from national tourism surveys and regionally/locally based data.

CONTEXTUAL ANALYSIS

The three key surveys used to measure volume and expenditure from tourism trips are the GB Tourism Survey (for domestic overnight trips), the International Passenger Survey (IPS) for visits from overseas, and the BG Day Visitor Survey (GBDVS), which measures tourism day visits.

Domestic tourism

National Performance

In 2019, British residents took 99.7 million overnight trips in England, totalling 290 million nights away from home and expenditure of £19.4 billion, with an average trip length of 2.9 nights. England saw an overall increase in trips compared to 2018 of +1.7%. Holiday Trips in England in 2019 increased by 2.6% compared to 2018, with 46.4 million trips recorded.

Regional performance

The East of England region experienced a 11% increase in overnight trips during 2019 (following a 12% drop the previous year). Bednights were also up, by 12% on 2018 (after an 8% drop the previous year) and expenditure was up by 6% (following an 8% drop in value the previous year).

The average expenditure per night in 2019 was £52.8 (from £55.9 in 2018) and the spend per trip was £170.9 (up from £179.5 in 2018). The region received more visitors in 2019 than in the previous year. Their length of stay of these trips was unchanged from 2018 but they spend less during their visit, compared average expenditure levels in 2018.

The GB Tourism Survey data is a key driver for the Cambridge model. However, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to highlight longer-term trends, whilst helping smooth out short term market fluctuations and reducing the impact of any methodological changes affecting the survey. As such, county and district level results relating to 2019 are an average of 2017, 2018 and 2019 results.

Visits from overseas

National Performance

The number of visits in 2019 reached 40.9 million, up from 40.3 million in 2018. The value of spending increased by 14%, from £26.5 billion in 2018 to £28.4 billion in 2019. Average spend per visit was £696 in 2019, up from £658 the previous year. The number of visitor nights spent in the UK was almost on 2018 (290 million nights in 2019 and 291 million nights in 2018), with the average number of nights per visit declining slightly to 7.1 in 2019 (from 7.2 the previous year).

Regional performance

The number of overseas trips to the East of England in 2019 was unchanged year-on-year, at 2.27 million trips (down on 2.4 million overnight trips in 2017). The total number of nights was up by 12% to 16.4 million nights (following a 14% drop the previous year). Spend was up to 36% to £1.02 billion, (following a 14% drop the previous year).

The International Passenger Survey (IPS) data is a key driver for the Cambridge model. However, as with the GBTS, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to highlight longer-term trends, whilst helping smooth out short term market fluctuations and reducing the impact of any methodological changes affecting the survey. As such, county and district level results relating to 2019 are an average of 2017, 2018 and 2019 results.

Tourism Day Visits

National Performance

During 2019, UK residents took a total of 1,653 million Tourism Day Visits (down from 1,703 in 2018). Around £67 billion was spent during these trips, about 4.8% up on 2018.

The largest proportion of visits were taken to destinations in England (1,390 million visits or 84% of the total). The distribution of expenditure during visits reflects this pattern, with a total value of day trips to England totalling £56.5 billion (84% of the total for GB).

Regional performance

During 2019, the volume tourism day visits in the East of England decreased by 10.5% to 123 million (following a 3% increase the previous year). Spend was also down by 7% to £4.7 billion (after a 31% increase the previous year).

The Day Visitor Survey (GBDVS) data is a key driver for the Cambridge model. However, as with the GBTS and IPS, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to highlight longer-term trends, whilst helping smooth out short term market fluctuations and reducing the impact of any methodological changes affecting the survey. As such, county and district level results relating to 2019 are an average of 2017, 2018 and 2019 results.

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

| | UK | | Overseas | | Total | |
|---------------------|-------------|------------------|----------------|-----|------------------|-----|
| Serviced | 611,000 | 33% | 147,000 | 29% | 758,000 | 32% |
| Self catering | 31,000 | 2% | 5,000 | 1% | 36,000 | 2% |
| Camping | 51,000 | 3% | 6,000 | 1% | 57,000 | 2% |
| Static caravans | 139,000 | 8% | 1,000 | 0% | 140,000 | 6% |
| Group/campus | 15,000 | 1% | 12,000 | 2% | 27,000 | 1% |
| Paying guest | 0 | 0% | 2,000 | 0% | 2,000 | 0% |
| Second homes | 22,000 | 1% | 6,000 | 1% | 28,000 | 1% |
| Boat moorings | 13,000 | 1% | 0 | 0% | 13,000 | 1% |
| Other | 30,000 | 2% | 104,000 | 21% | 134,000 | 6% |
| Friends & relatives | 916,000 | 50% | 226,000 | 45% | 1,142,000 | 49% |
| Total | 2019 | 1,828,000 | 507,000 | | 2,335,000 | |
| Comparison | 2018 | 1,887,000 | 519,000 | | 2,406,000 | |
| Difference | | -3% | -2% | | -3% | |

Nights by Accommodation

| | UK | | Overseas | | Total | |
|---------------------|-------------|------------------|------------------|-----|------------------|-----|
| Serviced | 1,097,000 | 23% | 581,000 | 18% | 1,678,000 | 21% |
| Self catering | 61,000 | 1% | 100,000 | 3% | 161,000 | 2% |
| Camping | 173,000 | 4% | 14,000 | 0% | 187,000 | 2% |
| Static caravans | 461,000 | 10% | 5,000 | 0% | 466,000 | 6% |
| Group/campus | 75,000 | 2% | 145,000 | 4% | 220,000 | 3% |
| Paying guest | 0 | 0% | 31,000 | 1% | 31,000 | 0% |
| Second homes | 67,000 | 1% | 173,000 | 5% | 240,000 | 3% |
| Boat moorings | 58,000 | 1% | 0 | 0% | 58,000 | 1% |
| Other | 92,000 | 2% | 163,000 | 5% | 255,000 | 3% |
| Friends & relatives | 2,611,000 | 56% | 2,107,000 | 64% | 4,718,000 | 59% |
| Total | 2019 | 4,696,000 | 3,318,000 | | 8,014,000 | |
| Comparison | 2018 | 4,775,000 | 3,157,000 | | 7,932,000 | |
| Difference | | -2% | 5% | | 1% | |

Spend by Accommodation Type

| | UK | | Overseas | | Total | |
|---------------------|--------------|---------------------|---------------------|-----|---------------------|-----|
| Serviced | £141,592,000 | 56% | £29,039,000 | 16% | £170,631,000 | 40% |
| Self catering | £2,973,000 | 1% | £7,524,000 | 4% | £10,497,000 | 2% |
| Camping | £5,745,000 | 2% | £660,000 | 0% | £6,405,000 | 1% |
| Static caravans | £16,476,000 | 6% | £2,000 | 0% | £16,478,000 | 4% |
| Group/campus | £813,000 | 0% | £5,785,000 | 3% | £6,598,000 | 2% |
| Paying guest | £0 | 0% | £912,000 | 1% | £912,000 | 0% |
| Second homes | £4,111,000 | 2% | £6,926,000 | 4% | £11,037,000 | 3% |
| Boat moorings | £3,126,000 | 1% | £0 | 0% | £3,126,000 | 1% |
| Other | £6,190,000 | 2% | £10,565,000 | 6% | £16,755,000 | 4% |
| Friends & relatives | £73,275,000 | 29% | £115,903,000 | 65% | £189,178,000 | 44% |
| Total | 2019 | £254,300,000 | £177,317,000 | | £431,617,000 | |
| Comparison | 2018 | £254,873,000 | £168,883,000 | | £423,756,000 | |
| Difference | | 0% | 5% | | 2% | |

Serviced accommodation includes hotels, guesthouses, inns, B&B and serviced farmhouse accommodation. Paying guest refers to overseas visitors staying in private houses, primarily language school students. Other trips includes nights spent in transit, in lorry cabs and other temporary accommodation.

Staying Visitors - Purpose of Trip

Trips by Purpose

| | UK | | Overseas | | Total | |
|---------------------|-------------|------------------|----------------|-----|------------------|-----|
| Holiday | 1,005,000 | 55% | 106,000 | 21% | 1,111,000 | 48% |
| Business | 199,000 | 11% | 123,000 | 24% | 322,000 | 14% |
| Friends & relatives | 589,000 | 32% | 229,000 | 45% | 818,000 | 35% |
| Other | 34,000 | 2% | 43,000 | 8% | 77,000 | 3% |
| Study | 0 | 0% | 7,000 | 1% | 7,000 | 0% |
| Total | 2019 | 1,828,000 | 507,000 | | 2,335,000 | |
| Comparison | 2018 | 1,887,000 | 519,000 | | 2,406,000 | |
| Difference | | -3% | -2% | | -3% | |

Nights by Purpose

| | UK | | Overseas | | Total | |
|---------------------|-------------|------------------|------------------|-----|------------------|-----|
| Holiday | 2,767,000 | 59% | 495,000 | 15% | 3,262,000 | 41% |
| Business | 441,000 | 9% | 576,000 | 17% | 1,017,000 | 13% |
| Friends & relatives | 1,393,000 | 30% | 1,942,000 | 59% | 3,335,000 | 42% |
| Other | 95,000 | 2% | 226,000 | 7% | 321,000 | 4% |
| Study | 0 | 0% | 79,000 | 2% | 79,000 | 1% |
| Total | 2019 | 4,696,000 | 3,318,000 | | 8,014,000 | |
| Comparison | 2018 | 4,775,000 | 3,157,000 | | 7,932,000 | |
| Difference | | -2% | 5% | | 1% | |

Spend by Purpose

| | UK | | Overseas | | Total | |
|---------------------|--------------|---------------------|---------------------|-----|---------------------|-----|
| Holiday | £146,142,000 | 57% | £34,406,000 | 19% | £180,548,000 | 42% |
| Business | £56,717,000 | 22% | £33,788,000 | 19% | £90,505,000 | 21% |
| Friends & relatives | £42,341,000 | 17% | £80,700,000 | 46% | £123,041,000 | 29% |
| Other | £9,099,000 | 4% | £17,474,000 | 10% | £26,573,000 | 6% |
| Study | £0 | 0% | £10,949,000 | 6% | £10,949,000 | 3% |
| Total | 2019 | £254,300,000 | £177,317,000 | | £431,617,000 | |
| Comparison | 2018 | £254,873,000 | £168,883,000 | | £423,756,000 | |
| Difference | | 0% | 5% | | 2% | |

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

| | Trips | | Spend | |
|--------------------|-------------|-------------------|-----------------------|--|
| Urban visits | 30,102,000 | | £1,348,906,000 | |
| Countryside visits | 12,886,000 | | £460,009,000 | |
| Coastal visits | 8,371,367 | | £311,549,529 | |
| Total | 2019 | 51,359,367 | £2,120,464,529 | |
| Comparison | 2018 | 53,106,003 | £2,012,921,488 | |
| Difference | | -3% | 5% | |

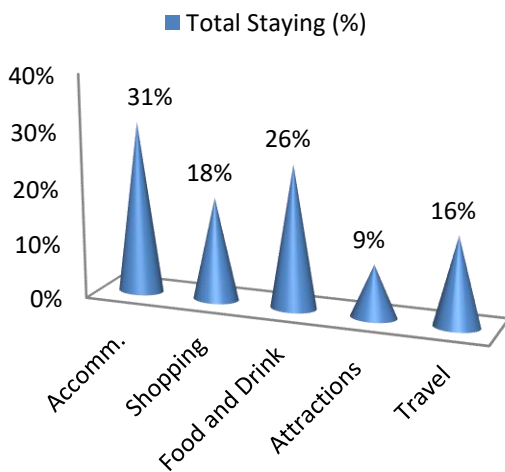
Value of Tourism

Expenditure Associated with Trips:

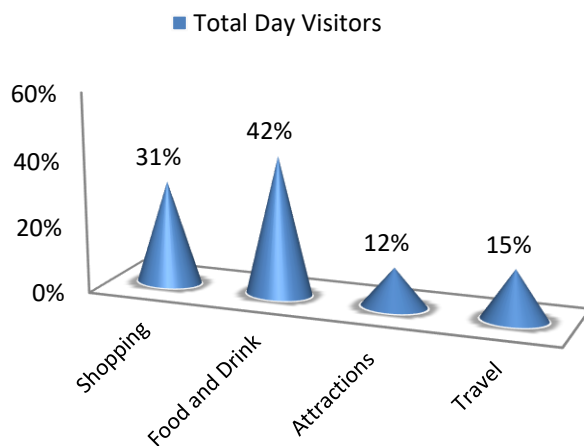
Direct Expenditure Associated with Trips

| | Accomm. | Shopping | Food and Drink | Attractions | Travel | Total |
|---------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|-----------------------|
| UK Tourists | £84,176,000 | £29,664,000 | £69,708,000 | £19,758,000 | £50,993,000 | £254,299,000 |
| Overseas tourists | £48,635,000 | £49,816,000 | £40,691,000 | £20,574,000 | £17,601,000 | £177,317,000 |
| Total Staying | £132,811,000 | £79,480,000 | £110,399,000 | £40,332,000 | £68,594,000 | £431,616,000 |
| Total Staying (%) | 31% | 18% | 26% | 9% | 16% | 100% |
| Total Day Visitors | £0 | £662,719,000 | £886,241,000 | £251,147,000 | £320,357,000 | ##### |
| Total Day Visitors | 0% | 31% | 42% | 12% | 15% | 100% |
| Total 2019 | £132,811,000 | £742,199,000 | £996,640,000 | £291,479,000 | £388,951,000 | £2,552,080,000 |
| % | 5% | 29% | 39% | 11% | 15% | 100% |
| Comparison 2018 | £123,048,000 | £758,886,000 | £934,835,000 | £280,509,000 | £339,400,000 | £2,436,678,000 |
| Difference | 8% | -2% | 7% | 4% | 15% | 5% |

Breakdown of expenditure



Breakdown of expenditure



Other expenditure associated with tourism activity

| Other expenditure associated with tourism activity - Estimated spend | | | | |
|---|-------------|-------------|---------------------|--------------|
| Second homes | Boats | Static vans | Friends & relatives | Total |
| £7,097,000 | £11,682,250 | £27,327,300 | £175,711,000 | £221,817,550 |

Spend on second homes is assumed to be an average of £2,100 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,100 on berthing charges, servicing and maintenance and upgrading of equipment. Static van spend arises in the case of vans purchased by the owner and used as a second home. Expenditure is incurred in site fees, utility charges and other spending and is estimated at £2,100. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £185 per visit has been assumed based on national research for social

Direct Turnover Derived From Trip Expenditure

Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending.

| | | Staying Visitor | Day Visitors | Total |
|---------------------|-------------|------------------------|-----------------------|-----------------------|
| Accommodation | | £135,019,000 | £17,725,000 | £152,744,000 |
| Retail | | £78,686,000 | £656,092,000 | £734,778,000 |
| Catering | | £107,087,000 | £859,654,000 | £966,741,000 |
| Attractions | | £42,231,000 | £266,637,000 | £308,868,000 |
| Transport | | £41,156,000 | £192,214,000 | £233,370,000 |
| Non-trip spend | | £221,817,550 | £0 | £221,817,550 |
| Total Direct | 2019 | £625,996,550 | £1,992,322,000 | £2,618,318,550 |
| Comparison | 2018 | £619,159,150 | £1,904,458,000 | £2,523,617,150 |
| Difference | | 1% | 5% | 4% |

Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Supplier and Income Induced Turnover

| | | Staying Visitor | Day Visitors | Total |
|-------------------|-------------|------------------------|---------------------|---------------------|
| Indirect spend | | £129,408,000 | £484,425,000 | £613,833,000 |
| Non trip spending | | £46,582,000 | £0 | £46,582,000 |
| Income induced | | £139,899,000 | £116,887,000 | £256,786,000 |
| Total | 2019 | £315,889,000 | £601,312,000 | £917,201,000 |
| Comparison | 2018 | £308,611,000 | £570,457,000 | £879,068,000 |
| Difference | | 2% | 5% | 4% |

Income induced spending arises from expenditure by employees whose jobs are supported by tourism spend.

Total Local Business Turnover Supported by Tourism Activity – Value of Tourism

| | | Staying Visitor | Day Visitors | Total |
|--------------------|-------------|------------------------|-----------------------|-----------------------|
| Direct | | £625,996,550 | £1,992,322,000 | £2,618,318,550 |
| Indirect | | £315,889,000 | £601,312,000 | £917,201,000 |
| Total Value | 2019 | £941,885,550 | £2,593,634,000 | £3,535,519,550 |
| Comparison | 2018 | £927,770,150 | £2,474,915,000 | £3,402,685,150 |
| Difference | | 2% | 5% | 4% |

Employment

Employment

The model generates estimates of full time equivalent jobs based on visitor spending. The total number of 'actual' jobs will be higher when part time and seasonal working is taken into account. Conversion of full time equivalent jobs into actual jobs relies on information from business surveys in the sectors receiving

Direct employment

| Full time equivalent (FTE) | | | | | | |
|----------------------------|-----------------|---------------|-------------|---------------|---------------|-----|
| | Staying Visitor | | Day Visitor | | Total | |
| Accommodation | 2,149 | 23% | 282 | 1% | 2,431 | 7% |
| Retailing | 729 | 8% | 6,079 | 24% | 6,808 | 20% |
| Catering | 1,668 | 18% | 13,388 | 53% | 15,056 | 43% |
| Entertainment | 664 | 7% | 4,191 | 17% | 4,854 | 14% |
| Transport | 276 | 3% | 1,290 | 5% | 1,566 | 5% |
| Non-trip spend | 4,033 | 42% | 0 | 0% | 4,033 | 12% |
| Total FTE | 2019 | 9,518 | | 25,229 | 34,748 | |
| Comparison | 2018 | 9,403 | | 24,026 | 33,429 | |
| Difference | | 1% | | 5% | 4% | |
| Estimated actual jobs | | | | | | |
| | Staying Visitor | | Day Visitor | | Total | |
| Accommodation | 3,180 | 25% | 417 | 1% | 3,597 | 7% |
| Retailing | 1,094 | 9% | 9,119 | 24% | 10,212 | 20% |
| Catering | 2,502 | 20% | 20,082 | 54% | 22,583 | 45% |
| Entertainment | 936 | 7% | 5,909 | 16% | 6,845 | 14% |
| Transport | 389 | 3% | 1,818 | 5% | 2,208 | 4% |
| Non-trip spend | 4,598 | 36% | 0 | 0% | 4,598 | 9% |
| Total Actual | 2019 | 12,698 | | 37,345 | 50,043 | |
| Comparison | 2018 | 12,512 | | 35,585 | 48,097 | |
| Difference | | 1% | | 5% | 4% | |

Indirect & Induced Employment

| Full time equivalent (FTE) | | | | | | |
|----------------------------|-----------------|--------------|--------------|---------------|---------------|--|
| | Staying Visitor | | Day Visitors | | Total | |
| Indirect jobs | 3,200 | | 8,808 | | 12,008 | |
| Induced jobs | 2,544 | | 2,125 | | 4,669 | |
| Total FTE | 2019 | 5,743 | | 10,933 | 16,676 | |
| Comparison | 2018 | 5,611 | | 10,372 | 15,983 | |
| Difference | | 2% | | 5% | 4% | |

| Estimated actual jobs | | | | | | |
|-----------------------|-----------------|--------------|--------------|---------------|---------------|--|
| | Staying Visitor | | Day Visitors | | Total | |
| Indirect jobs | 3,648 | | 10,041 | | 13,689 | |
| Induced jobs | 2,900 | | 2,423 | | 5,322 | |
| Total Actual | 2019 | 6,548 | | 12,464 | 19,011 | |
| Comparison | 2018 | 6,397 | | 11,824 | 18,221 | |
| Difference | | 2% | | 5% | 4% | |

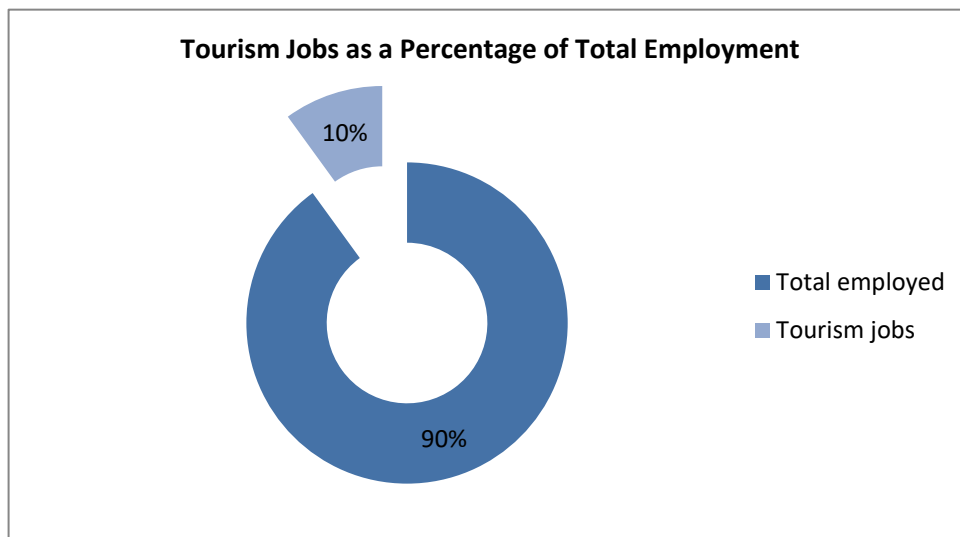
Total Jobs

Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

| Full time equivalent (FTE) | | | | | | |
|----------------------------|-----------------|---------------|-------------|---------------|--------|---------------|
| | Staying Visitor | | Day Visitor | | Total | |
| Direct | 9,518 | 62% | 25,229 | 70% | 34,748 | 68% |
| Indirect | 3,200 | 21% | 8,808 | 24% | 12,008 | 23% |
| Induced | 2,544 | 17% | 2,125 | 6% | 4,669 | 9% |
| Total FTE | 2019 | 15,262 | | 36,162 | | 51,424 |
| Comparison | 2018 | 15,014 | | 34,398 | | 49,412 |
| Difference | | 2% | | 5% | | 4% |
| Estimated actual jobs | | | | | | |
| | Staying Visitor | | Day Visitor | | Total | |
| Direct | 12,698 | 66% | 37,345 | 75% | 50,043 | 72% |
| Indirect | 3,648 | 19% | 10,041 | 20% | 13,689 | 20% |
| Induced | 2,900 | 15% | 2,423 | 5% | 5,322 | 8% |
| Total Actual | 2019 | 19,246 | | 49,809 | | 69,054 |
| Comparison | 2018 | 18,909 | | 47,409 | | 66,318 |
| Difference | | 2% | | 5% | | 4% |

Tourism Jobs as a Percentage of Total Employment

| | Staying Visitor | Day visitors | Total |
|----------------------------|-----------------|---------------|---------------|
| Total employed | 690,700 | 690,700 | 690,700 |
| Tourism jobs | 19,246 | 49,809 | 69,054 |
| Proportion all jobs | 3% | 7% | 10% |
| Comparison | 2018 | 18,909 | 47,409 |
| Difference | 2% | 5% | 4% |



Appendix I - Introduction about Cambridge Model

This report examines the volume and value of tourism and the impact of that expenditure on the local economy. The figures were derived using the Cambridge Economic Impact Model and the research was undertaken by Destination Research.

The model utilises information from national tourism surveys and regionally based data held by Destination Research. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level.

Limitations of the Model

The methodology and accuracy of the above sources vary. The results of the model should therefore be regarded as estimates which are indicative of the scale and importance of visitor activity in the local area. It is important to note that in the national tourism surveys the sample sizes for each area changes year on year. This is as a result of the random probability nature of the methodology. As such, the results of the Cambridge Model are best viewed as a snapshot in time and we would caution against year-on-year comparisons.

It should be noted that the model cannot take into account any leakage of expenditure from tourists taking day trips out of the area in which they are staying. While it is assumed that these may broadly balance each other in many areas, in locations receiving significant numbers of day visitors from London, there is likely to be an underestimate in relation to the number of overseas day visitors staying in holiday accommodation in London.

Whilst it is important to be aware of these issues, we are confident that the estimates we have produced are as reliable as is practically possible within the constraints of the information available.

Rounding

All figures used in this report have been rounded. Therefore, in some tables there may be a slight discrepancy between totals and sub totals.

Data sources

The main national surveys used as data sources in stage one include:

- Great Britain Tourism Survey (GBTS) - information on tourism activity by GB residents;
- International Passenger Survey (IPS) information on overseas visitors to the United Kingdom;
- Day Visits in the annual Great Britain Day Visitor Survey using information on visits lasting more than 3 hours and taken on an irregular basis

These surveys provide information down to a regional level. In order to disaggregate data to a local level the following information sources are used:

- Records of known local accommodation stock held by Destination Research;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions ;
- Mid- 2018 estimates of resident population as based on the 2011 Census of Population;
- Selected data from the 2011 Census of Employment;
- Selected data on the countryside and coast including, national designations and length of the coastline.

Staying Visitors

The GBTS provides information on the total number of trips to the region and the relative proportions using different types of accommodation. By matching these figures to the supply of such accommodation, the regional average number of trips per bedspace or unit of accommodation can be derived. The IPS provides information on the total number of trips by overseas visitors to the region. The model uses three year rolling averages to reduce extreme highs and lows which are due to small sample sizes, rather than being a reflection on drastic changes in demand year-on-year.

Day Visitors

Information on day trips at the regional level is available from the Day Visits in Great Britain survey. The survey includes all leisure-related trips from home. It should be noted that a large proportion are local trips made by people resident in the locality. The model uses information from the survey to estimate the number of longer day trips (defined as those lasting at least 3 hours and involving travel of more than 20 miles) and irregular trips lasting more than 3 hours.

Impact of tourism expenditure

This section examines the impact of the tourism expenditure in terms of the direct, indirect and induced expenditure as well as an estimate of the actual jobs (both direct and indirect) supported by tourism expenditure in the district.

The GBTS, IPS and Day Visits to Great Britain survey data on the breakdown of visitor spending. The impact of this initial round of expenditure will be subsequently increased by multiplier effects. These arise from the purchase of supplies and services by the businesses in receipt of visitor expenditure (indirect impacts), and by the income induced-effects arising from the spending of wages by employees in the first round of business and in subsequent expenditure in supplier business (induced impacts).

The New Earnings Survey which provides information on wage levels by industry sector and region; An internal business database which includes data on the structure of business expenditure, local linkages and multiplier ratios drawn from a wide range of business and economic studies carried out by Geoff Broom Associates, PA Cambridge Economic Consultants and others. By applying the breakdown to the estimates of visitor spending, the model generates estimates of total direct spending.

Evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover – for example, some expenditure on food and drink actually takes place in inns and hotels that fall in the accommodation sector and within attractions. More significantly, expenditure on travel costs associated with individual trips is equally likely to take place at the origin of the trip as the destination. Therefore the model assumes that only 40% of travel expenditure accrues to the destination area.

Number of full time job equivalents

Having identified the value of turnover generated by visitor spending, it is possible to estimate the employment associated with that spending. Wages for staff and drawings for the proprietors will absorb a proportion of that turnover. By applying these proportions to the overall additional turnover in each sector, the amount of money absorbed by employment costs can be calculated. The New Earnings Survey provides data from which the average costs by business sector, adjusted to take account of regional differences, can be calculated.

After allowing for additional costs such as National Insurance and pension costs, an average employment cost per full time equivalent job can be estimated. The number of such jobs in the local area can then be estimated by dividing the amount of business expenditure on wages and drawings by the average employment cost per job.

Number of Actual Jobs

The model generates estimates of full time equivalent jobs based on visitor spending. However, the total number of actual jobs will be higher when part time and seasonal working is taken into account. The full time equivalent jobs arising directly from visitor spending are converted into actual jobs using information from business surveys in the sectors receiving visitor spending (principally accommodation, food and drink, retail, attractions, transport). In general, the conversion factor between full time equivalent jobs and actual jobs varies around 1.5 in those sectors.

The indirect and induced jobs arise across a much wider range of employment sectors. Therefore, the average 1.16 for all sectors based on Census of Employment data has been used to convert full time equivalent jobs in this sector to actual jobs.

The employment estimates generated by the model include both self-employed and employed people supported by visitor expenditure. The model also includes an estimate of the additional jobs arising in the attractions sector, which are not related to visitor expenditure. However, the numbers do not include other tourism-related employment such as jobs in local authorities arising from their tourism functions, e.g. tourist information staff, additional public health, parks and gardens, public conveniences, maintenance sections and jobs arising from capital investment in tourism facilities.

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