



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

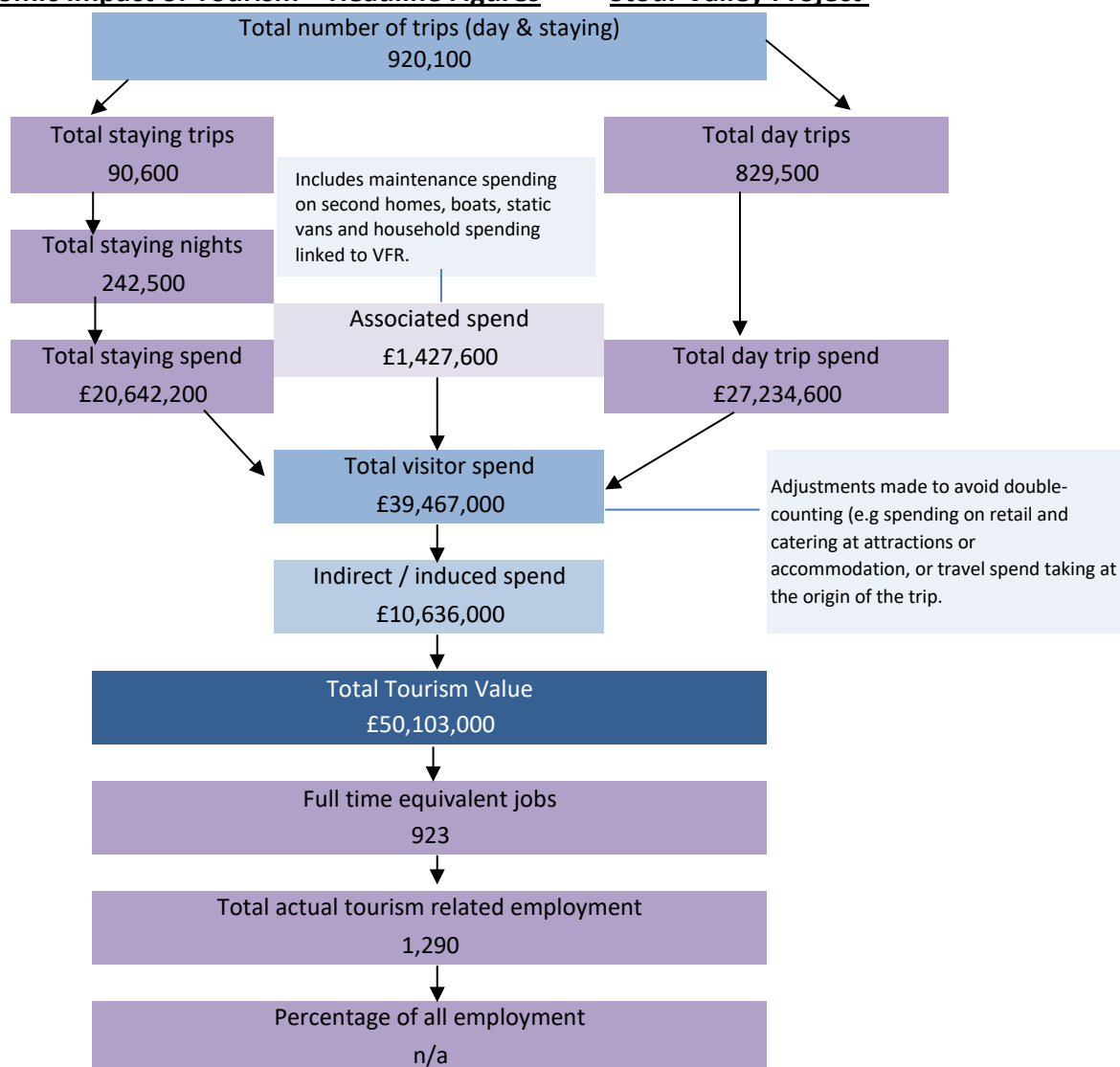


Economic Impact of Tourism  
Stour Valley Project - 2023

<b>Contents</b>	<b>Page</b>
<b><u>Summary Results</u></b>	<b><u>3</u></b>
<b><u>Contextual analysis</u></b>	<b><u>5</u></b>
<b><u>Volume of Tourism</u></b>	<b><u>8</u></b>
<b>Staying Visitors - Accommodation Type</b>	<b>9</b>
Trips by Accommodation	9
Nights by Accommodation	9
Spend by Accommodation Type	9
<b>Staying Visitors - Purpose of Trip</b>	<b>10</b>
Trips by Purpose	10
Nights by Purpose	10
Spend by Purpose	10
<b>Day Visitors</b>	<b>10</b>
Trips and Spend by Urban, Rural and Coastal Area	10
<b><u>Value of Tourism</u></b>	<b><u>11</u></b>
<b>Expenditure Associated With Trips</b>	<b>12</b>
Direct Expenditure Associated with Trips	12
Other expenditure associated with tourism activity	12
Direct Turnover Derived From Trip Expenditure	13
Supplier and Income Induced Turnover	13
Total Local Business Turnover Supported by Tourism Activity	13
<b><u>Employment</u></b>	<b><u>13</u></b>
<b>Direct</b>	<b>14</b>
Full time equivalent	14
Estimated actual jobs	14
<b>Indirect &amp; Induced Employment</b>	<b>14</b>
Full time equivalent	14
Estimated actual jobs	14
<b>Total Jobs</b>	<b>15</b>
Full time equivalent	15
Estimated actual jobs	15
<b>Tourism Jobs as a Percentage of Total Employment</b>	<b>15</b>
<b><u>Appendix I - Cambridge Model - Methodology</u></b>	<b><u>17</u></b>

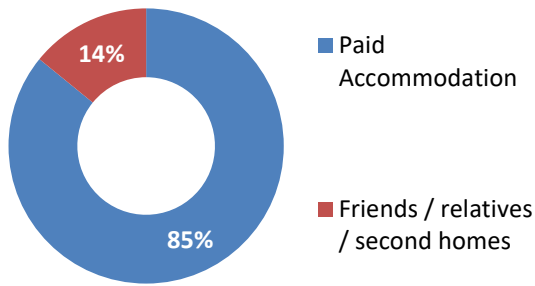
## Economic Impact of Tourism – Headline Figures

## Stour Valley Project

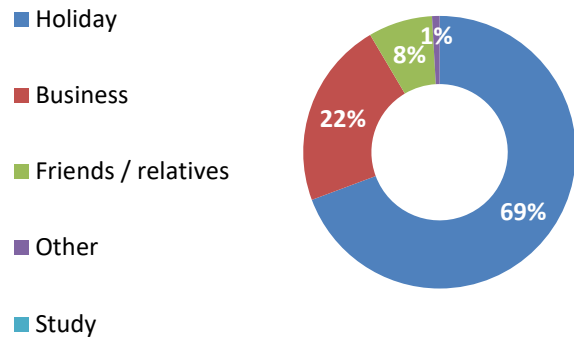


Economic Impact of Tourism – Year on year comparisons				Year-on-year comparison	Pre-pandemic levels
	2023	2022	2019	2023 v 2022	2023 v 2019
<b>Day Trips</b>					
Day trips Volume	829,500	846,000	838,800	-2%	-1%
Day trips Value	£27,234,600	£27,717,000	£26,824,500	-2%	2%
<b>Overnight trips</b>					
Number of overnight trips	90,600	83,500	95,300	9%	-5%
Number of nights	242,500	227,000	273,100	7%	-11%
Overnight trip value	£20,642,200	£20,460,400	£22,550,700	1%	-8%
<b>Total Value</b>	<b>£50,103,000</b>	<b>£50,126,300</b>	<b>£49,480,000</b>	<b>0%</b>	<b>1%</b>
<b>Actual Jobs</b>	<b>1,290</b>	<b>1,297</b>	<b>1,283</b>	<b>-1%</b>	<b>1%</b>
	<b>2023</b>	<b>2022</b>	<b>2019</b>	<b>2023 v 2022</b>	<b>2023 v 2019</b>
Average length stay (nights x trip)	2.67	2.71	2.87	-1.4%	-6.7%
Spend x overnight trip	£227.59	£244.45	£236.63	-6.9%	-3.8%
Spend x night	£85.12	£90.17	£82.57	-5.6%	3.1%
Spend x day trip	£32.83	£32.76	£31.98	0.2%	2.7%

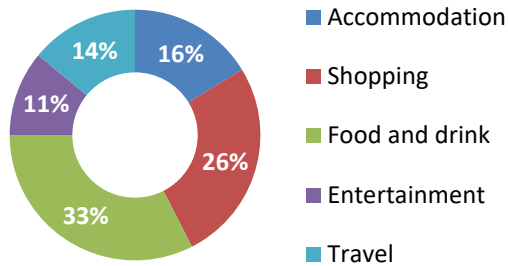
### Type of Accommodation



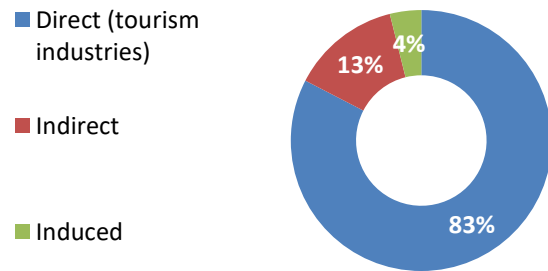
### Trips by Purpose



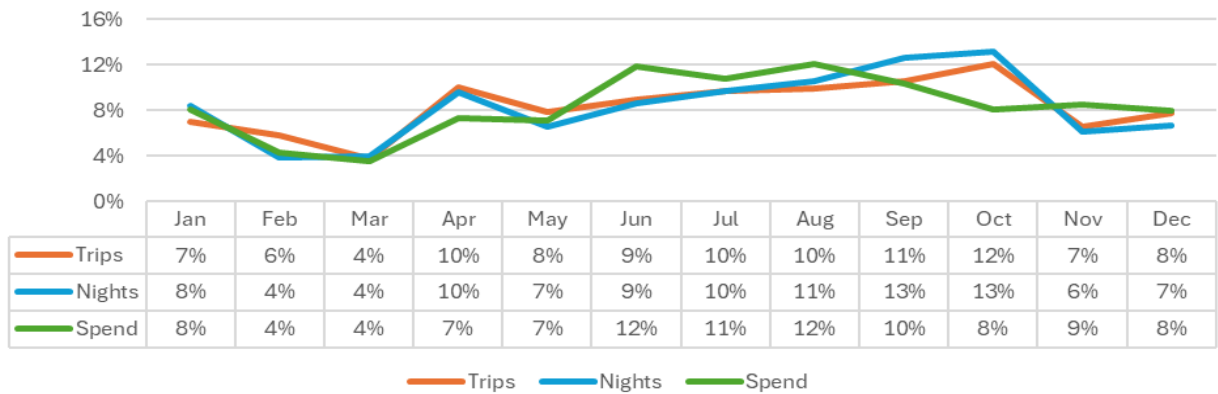
### Breakdown of expenditure



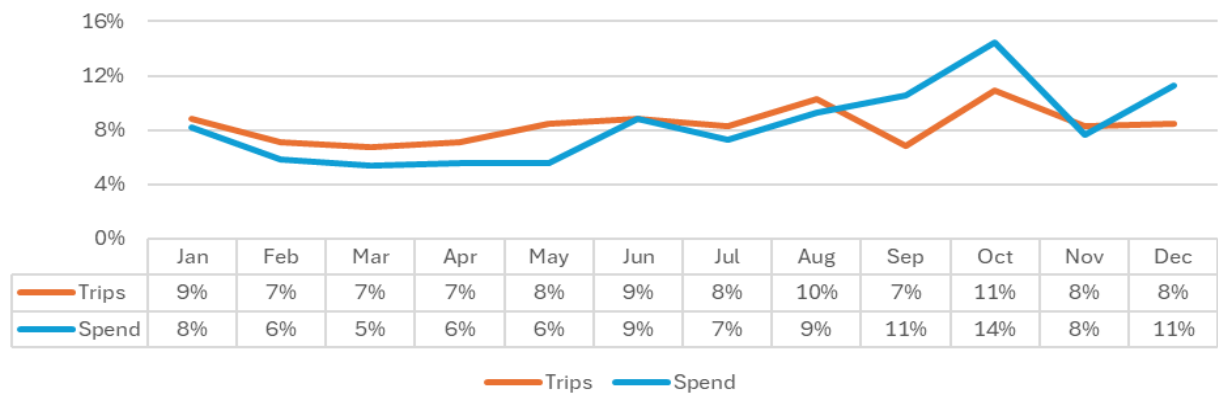
### Type of employment



### Domestic Overnight Trips - East of England - 2023



### Tourism DayTrips - East of England - 2023



## **Introduction**

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2023 and provides comparative data against the previously published data for 2022 as well as providing headline comparisons against 2019 in order to monitor the recovery from the COVID-19 pandemic.

The Cambridge Model is a constantly evolving product. During the pandemic, all data collection for the key national tourism surveys used in the model ceased. This was followed with a change in the way domestic and overseas tourism statistics were captured. Data collection for domestic tourism moved from two surveys, one for day visits (GBDVS) and one for overnight stays (GBTS) based on face-to-face interviewing, to a new combined online survey collecting data on both domestic overnight trips as well as domestic day trips. The revised methodology to 2023's data was also applied to the already published in 2022, the only other comparative full year of new data now available.

Responding to these changes, we adopted a hybrid data approach with a two-stage evaluation process. First, the Cambridge Model disaggregates regional tourism data into sub-regional areas, using a top-down approach. It then pairs this with bottom-up initiatives, including contextual and sector-specific data from third-party sources and detailed destination-level business performance data captured by or on behalf of our destination partners.

This evolving methodology has been pivotal in our ability to produce a dynamic and reliable picture of tourism trends throughout the pandemic years and beyond. It also ensures that our results are as timely, accurate, consistent, and comparable as they can be. Some examples of additional data sources introduced in the last 5 years are:

- Attractions data - ALVA (Association of Leading Visitor Attractions)
- Short-term rental stock and occupancy - Lighthouse / AirDNA
- Hotel market data and benchmarking – STR
- Tourism business counts - Inter Departmental Business Register (IDBR)
- UK inflation data - Consumer Prices Index (CPI, CPIH), Retail Prices Index (RPI)
- UK economy forecasts - Office for Budget Responsibility: Economic and fiscal outlook
- Footfall data (town centres, large retail outlets and car parks).

## **Domestic Tourism**

### **Overnights visits**

The revised 2023 data shows a decline in overnight trips by 5% compared to 2022 for Britain and England (2022, was generally viewed as a particularly good post pandemic year for domestic tourism). The total overnight trip spend was down 2% for both, Britain and England. When taking inflation into account, the total overnight trip spend was down 9%, compared to 2022.

The East of England registered 8.9 million domestic overnight trips during 2023 (down 13% from 10.3 million trips in 2022). These trips contributed a total of £2.02 billion in spend (down 9% from £2.21 billion in 2022 and down 15% in real terms, accounting for inflation).

### Accommodation occupancy

#### East of England – Serviced Accommodation Room Occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
<b>2019</b>	63%	72%	72%	74%	78%	81%	84%	79%	81%	80%	75%	67%	76%
<b>2022</b>	55%	70%	74%	76%	76%	82%	85%	81%	83%	80%	79%	73%	76%
<b>2023</b>	69%	77%	78%	80%	81%	83%	84%	81%	84%	80%	76%	71%	79%

It is possible that hotel occupancy measures overstate trips compared to previous years because of ongoing workforce shortages. Hospitality businesses' coping strategies for workforce shortages included closing on certain days or reducing the number of rooms available. This means that the number of rooms occupied could be lower while the occupancy rate was the same, due to fewer available rooms.

#### East of England – Self Catering Unit Occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
<b>2019</b>	51%	50%	49%	56%	55%	58%	53%	67%	55%	54%	47%	50%	54%
<b>2023</b>	42%	46%	44%	49%	47%	49%	53%	57%	48%	44%	39%	44%	47%

Short-term holiday rentals experienced a surge since the pandemic. However, the sector is now feeling the effects of the cost-of-living crisis, and an increasingly oversupply of holiday lets. According to AirDNA, new listings for homes in the UK jumped 22% year on year in 2023.

### Day visits

#### Visits to visitor attractions

Visitor Attraction Trends in England 2023 report (Visit England, July 2024) shows that admissions volume for participating attractions in 2023 were 11% up (196.14m) on 2022 (176.87m), but 28% down on 2019 (273.75m). The sector's growth was mainly fuelled by the return of overseas visitors and an increase in school trips in 2023.

There was an 8% increase in 2023 adult admission fees but was not sufficient to absorb the rising supplier and energy costs, a general decline in staycations and the wet weather (affecting outdoor attractions).

Overall, visitors to ALVA's top 374 sites (Association of Leading Visitor Attractions) were up 19% year-on-year in 2023 to 146.6 million as the sector continues its climb back to pre-pandemic levels. Overall, current numbers are 11% down on 2019.

The East of England experienced a 6% year-on-year raise in admissions in 2023, based on the volume of visits to the same attractions. The region was least affected by the pandemic, and has been the quickest to recover, now only 2% behind 2019 levels.

The total number of visits to ALVA (Association of Leading Visitor Attractions) sites in the East of England in 2023 was 10% up on the previous year. The 2023 figures are in line with the volume of visits to the same attractions in 2019.

### **Overseas tourism**

Visitor numbers: Official data from the Office for National Statistics (ONS) showed that there were 38.0 million overseas tourists visiting the UK last year (up 21% vs 2022). Overall, 292.9 million nights were spent in the UK in 2023, up 1% vs 2019 and up 11% vs 2022

Visitor spending: In nominal terms, spend has been setting records, although not in real terms i.e. adjusting for inflation. Spend per visit has been almost tracking inflation, therefore the total value of spend has been almost tracking the volume of visits in real terms i.e. adjusting for inflation. Inbound visitors spent a record £31.1 billion during 2023, up 17% vs 2022. Taking inflation into account, visitor spend was up 9% vs 2022.

The East of England registered 2.2 million inbound visits during 2023 (up 9% from 2.0 million trips in 2022). These trips contributed a total of £1.11 billion in spend (up 11% from £1.00 billion in 2022).

## Volume of Tourism



## Staying Visitors - Accommodation Type

### Trips by Accommodation

	UK		Overseas		Total	
Serviced	67,300	81%	5,200	67%	72,500	80%
Self catering	1,300	2%	100	1%	1,400	2%
Camping	400	0%	0	0%	400	0%
Static caravans	0	0%	0	0%	0	0%
Group/campus	0	0%	0	0%	0	0%
Paying guest	0	0%	0	0%	0	0%
Second homes	800	1%	0	0%	800	1%
Boat moorings	0	0%	0	0%	0	0%
Other	2,400	3%	500	6%	2,900	3%
Friends & relatives	10,700	13%	2,000	26%	12,700	14%
<b>Total 2023</b>	<b>82,900</b>		<b>7,800</b>		<b>90,700</b>	
<b>Comparison 2022</b>	<b>77,100</b>		<b>6,600</b>		<b>83,700</b>	
<b>Difference</b>	<b>8%</b>		<b>18%</b>		<b>8%</b>	

### Nights by Accommodation

	UK		Overseas		Total	
Serviced	128,800	69%	35,500	62%	164,300	68%
Self catering	6,600	4%	1,400	2%	8,000	3%
Camping	2,300	1%	100	0%	2,400	1%
Static caravans	0	0%	0	0%	0	0%
Group/campus	0	0%	0	0%	0	0%
Paying guest	0	0%	0	0%	0	0%
Second homes	3,900	2%	1,800	3%	5,700	2%
Boat moorings	0	0%	0	0%	0	0%
Other	8,000	4%	1,500	3%	9,500	4%
Friends & relatives	36,000	19%	16,600	29%	52,600	22%
<b>Total 2023</b>	<b>185,600</b>		<b>56,900</b>		<b>242,500</b>	
<b>Comparison 2022</b>	<b>180,300</b>		<b>46,600</b>		<b>226,900</b>	
<b>Difference</b>	<b>3%</b>		<b>22%</b>		<b>7%</b>	

### Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£15,809,300	86%	£1,348,300	60%	£17,157,600	83%
Self catering	£342,300	2%	£88,800	4%	£431,100	2%
Camping	£69,800	0%	£2,600	0%	£72,400	0%
Static caravans	£0	0%	£0	0%	£0	0%
Group/campus	£0	0%	£0	0%	£0	0%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£87,800	0%	£50,400	2%	£138,200	1%
Boat moorings	£0	0%	£0	0%	£0	0%
Other	£1,298,400	7%	£38,100	2%	£1,336,500	6%
Friends & relatives	£796,500	4%	£709,700	32%	£1,506,200	7%
<b>Total 2023</b>	<b>£18,404,100</b>		<b>£2,237,900</b>		<b>£20,642,000</b>	
<b>Comparison 2022</b>	<b>£18,446,200</b>		<b>£2,014,200</b>		<b>£20,460,400</b>	
<b>Difference</b>	<b>0%</b>		<b>11%</b>		<b>1%</b>	

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	58,400	71%	4,400	56%	62,800	69%
Business	18,500	22%	1,600	21%	20,100	22%
Friends & relatives	5,200	6%	1,700	22%	6,900	8%
Other	700	1%	100	1%	800	1%
Study	0	0%	0	0%	0	0%
<b>Total</b>	<b>2023</b>	<b>82,800</b>	<b>7,800</b>		<b>90,600</b>	
<b>Comparison</b>	<b>2022</b>	<b>77,000</b>	<b>6,500</b>		<b>83,500</b>	
<b>Difference</b>		<b>8%</b>	<b>20%</b>		<b>9%</b>	

### Nights by Purpose

	UK		Overseas		Total	
Holiday	151,100	81%	31,200	55%	182,300	75%
Business	24,400	13%	6,300	11%	30,700	13%
Friends & relatives	9,100	5%	17,600	31%	26,700	11%
Other	1,000	1%	1,800	3%	2,800	1%
Study	0	0%	0	0%	0	0%
<b>Total</b>	<b>2023</b>	<b>185,600</b>	<b>56,900</b>		<b>242,500</b>	
<b>Comparison</b>	<b>2022</b>	<b>180,400</b>	<b>46,600</b>		<b>227,000</b>	
<b>Difference</b>		<b>3%</b>	<b>22%</b>		<b>7%</b>	

### Spend by Purpose

	UK		Overseas		Total	
Holiday	£12,805,600	70%	£1,348,100	60%	£14,153,700	69%
Business	£4,912,800	27%	£288,200	13%	£5,201,000	25%
Friends & relatives	£592,500	3%	£520,600	23%	£1,113,100	5%
Other	£93,200	1%	£81,200	4%	£174,400	1%
Study	£0	0%	£0	0%	£0	0%
<b>Total</b>	<b>2023</b>	<b>£18,404,100</b>	<b>£2,238,100</b>		<b>£20,642,200</b>	
<b>Comparison</b>	<b>2022</b>	<b>£18,446,100</b>	<b>£2,014,300</b>		<b>£20,460,400</b>	
<b>Difference</b>		<b>0%</b>	<b>11%</b>		<b>1%</b>	

## Day Visitors

### Trips and Spend by Urban, Rural and Coastal Area

	Trips		Spend	
Urban visits	518,800		£18,633,800	
Countryside visits	310,700		£8,600,800	
Coastal visits	0		£0	
<b>Total</b>	<b>2023</b>	<b>829,500</b>	<b>£27,234,600</b>	
<b>Comparison</b>	<b>2022</b>	<b>846,000</b>	<b>£27,717,000</b>	
<b>Difference</b>		<b>-2%</b>	<b>-2%</b>	

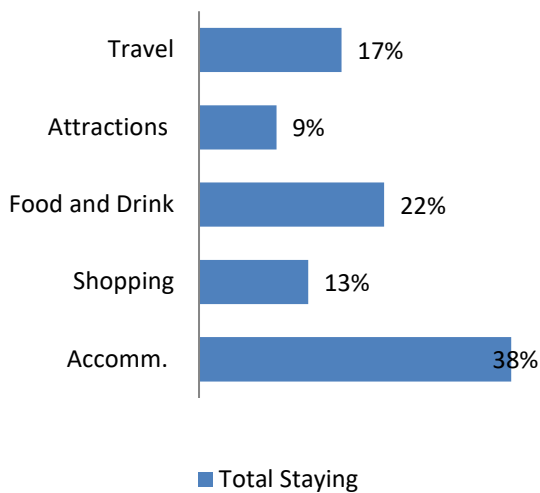
## Value of Tourism

**Expenditure Associated with Trips:**

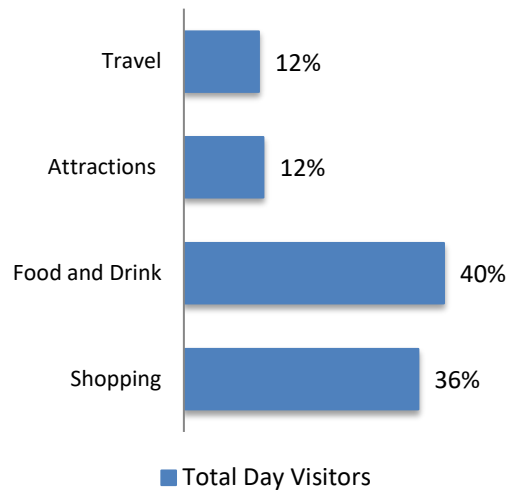
**Direct Expenditure Associated with Trips**

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£7,096,000	£2,109,000	£4,118,000	£1,742,000	£3,340,000	£18,405,000
Overseas tourists	£697,000	£616,000	£507,000	£196,000	£223,000	£2,239,000
<b>Total Staying</b>	<b>£7,793,000</b>	<b>£2,725,000</b>	<b>£4,625,000</b>	<b>£1,938,000</b>	<b>£3,563,000</b>	<b>£20,644,000</b>
<b>Total Staying</b>	<b>38%</b>	<b>13%</b>	<b>22%</b>	<b>9%</b>	<b>17%</b>	<b>100%</b>
<b>Total Day Visitors</b>	<b>£0</b>	<b>£9,830,000</b>	<b>£10,915,000</b>	<b>£3,341,000</b>	<b>£3,148,000</b>	<b>£27,234,000</b>
<b>Total Day Visitors</b>	<b>0%</b>	<b>36%</b>	<b>40%</b>	<b>12%</b>	<b>12%</b>	<b>100%</b>
<b>Total 2023</b>	<b>£7,793,000</b>	<b>£12,555,000</b>	<b>£15,540,000</b>	<b>£5,279,000</b>	<b>£6,711,000</b>	<b>£47,878,000</b>
<b>%</b>	<b>16%</b>	<b>26%</b>	<b>32%</b>	<b>11%</b>	<b>14%</b>	<b>100%</b>
<b>Comparison 2022</b>	<b>£7,738,000</b>	<b>£12,594,000</b>	<b>£15,724,000</b>	<b>£5,318,000</b>	<b>£6,806,000</b>	<b>£48,180,000</b>
<b>Difference</b>	<b>1%</b>	<b>0%</b>	<b>-1%</b>	<b>-1%</b>	<b>-1%</b>	<b>-1%</b>

**Breakdown of expenditure**



**Breakdown of expenditure**



**Other expenditure associated with tourism activity**

<b>Other expenditure associated with tourism activity - Estimated spend</b>				
Second homes	Boats	Static vans	Friends & relatives	Total
£265,200	£0	£0	£1,162,400	£1,427,600

Spend on second homes is assumed to be an average of £2,200 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,300 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 £2,300. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £190 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.

		<b>Staying Visitor</b>	<b>Day Visitors</b>	<b>Total</b>
Accommodation		£7,885,700	£0	£7,885,700
Retail		£2,697,700	£8,196,300	£10,894,000
Catering		£4,531,700	£6,915,600	£11,447,300
Attractions		£2,010,700	£1,792,900	£3,803,600
Transport		£2,279,900	£1,728,900	£4,008,800
Non-trip spend		£1,427,600	£0	£1,427,600
<b>Total Direct</b>	<b>2023</b>	<b>£20,833,300</b>	<b>£18,633,700</b>	<b>£39,467,000</b>
<b>Comparison</b>	<b>2022</b>	<b>£20,676,400</b>	<b>£18,754,000</b>	<b>£39,430,400</b>
<b>Difference</b>		<b>1%</b>	<b>-1%</b>	<b>0%</b>

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

		<b>Staying Visitor</b>	<b>Day Visitors</b>	<b>Total</b>
Indirect spend		£4,092,700	£3,955,900	£8,048,600
Non trip spending		£214,100	£0	£214,100
Income induced		£1,145,200	£1,228,100	£2,373,300
<b>Total</b>	<b>2023</b>	<b>£5,452,000</b>	<b>£5,184,000</b>	<b>£10,636,000</b>
<b>Comparison</b>	<b>2022</b>	<b>£5,413,500</b>	<b>£5,282,400</b>	<b>£10,695,900</b>
<b>Difference</b>		<b>1%</b>	<b>-2%</b>	<b>-1%</b>

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

		<b>Staying Visitor</b>	<b>Day Visitors</b>	<b>Total</b>
Direct		£20,833,300	£18,633,700	£39,467,000
Indirect		£5,452,000	£5,184,000	£10,636,000
<b>Total Value</b>	<b>2023</b>	<b>£26,285,300</b>	<b>£23,817,700</b>	<b>£50,103,000</b>
<b>Comparison</b>	<b>2022</b>	<b>£26,089,900</b>	<b>£24,036,400</b>	<b>£50,126,300</b>
<b>Difference</b>		<b>1%</b>	<b>-1%</b>	<b>0%</b>

# 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	153	44%	4	1%	157	22%
Retailing	32	9%	114	30%	145	20%
Catering	82	24%	192	50%	275	38%
Entertainment	31	9%	54	14%	85	12%
Transport	20	6%	17	4%	37	5%
Non-trip spend	26	8%	0	0%	26	4%
<b>Total FTE</b>	<b>2023</b>	<b>344</b>	<b>382</b>		<b>726</b>	
<b>Comparison</b>	<b>2022</b>	<b>342</b>	<b>388</b>		<b>730</b>	
<b>Difference</b>		<b>1%</b>	<b>-2%</b>		<b>-1%</b>	
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Accommodation	226	45%	6	1%	233	22%
Retailing	47	9%	171	30%	218	20%
Catering	123	25%	288	51%	412	39%
Entertainment	43	9%	77	14%	120	11%
Transport	29	6%	24	4%	52	5%
Non-trip spend	30	6%	0	0%	30	3%
<b>Total Actual</b>	<b>2023</b>	<b>499</b>	<b>566</b>		<b>1,065</b>	
<b>Comparison</b>	<b>2022</b>	<b>496</b>	<b>576</b>		<b>1,072</b>	
<b>Difference</b>		<b>1%</b>	<b>-2%</b>		<b>-1%</b>	

### Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	80	73	153
Induced jobs	21	23	44
<b>Total FTE</b>	<b>2023</b>	<b>101</b>	<b>197</b>
<b>Comparison</b>	<b>2022</b>	<b>100</b>	<b>198</b>
<b>Difference</b>		<b>1%</b>	<b>-1%</b>

Estimated actual jobs			
	Staying Visitor	Day Visitors	Total
Indirect jobs	91	84	174
Induced jobs	24	26	50
<b>Total Actual</b>	<b>2023</b>	<b>115</b>	<b>225</b>
<b>Comparison</b>	<b>2022</b>	<b>114</b>	<b>226</b>
<b>Difference</b>		<b>1%</b>	<b>-1%</b>

## 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	344	77%	382	80%	726	79%
Indirect	80	18%	73	15%	153	17%
Induced	21	5%	23	5%	44	5%
<b>Total FTE</b>	<b>2023</b>	<b>445</b>	<b>478</b>		<b>923</b>	
<b>Comparison</b>	<b>2022</b>	<b>442</b>	<b>486</b>		<b>928</b>	
<b>Difference</b>		<b>1%</b>	<b>-2%</b>		<b>-1%</b>	
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Direct	499	81%	566	84%	1,065	83%
Indirect	91	15%	84	12%	174	14%
Induced	24	4%	26	4%	50	4%
<b>Total Actual</b>	<b>2023</b>	<b>614</b>	<b>675</b>		<b>1,290</b>	
<b>Comparison</b>	<b>2022</b>	<b>610</b>	<b>688</b>		<b>1,297</b>	
<b>Difference</b>		<b>1%</b>	<b>-2%</b>		<b>-1%</b>	



## **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.

### **Data sources**

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

- Domestic tourism statistics: An online survey collecting data on both domestic overnight trips as well as domestic day trips.
- International Passenger Survey (IPS) information on overseas visitors to the UK.

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;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions;
- Attractions data supplied by ALVA (Association of Leading Visitor Attractions)
- Short-term rental stock and occupancy - Lighthouse / AirDNA
- Hotel market data and benchmarking – STR
- Latest estimates of resident population as based on the Census of Population;
- Selected data from ONS employment-related surveys;
- Selected data on the countryside and coast including, national designations and length of the coastline (where relevant).

The model also includes contextual and sector-specific data from third-party sources and destination-level business performance data captured by or on behalf of our destination partners. Data sources include:

- Tourism business counts - Inter Departmental Business Register (IDBR)
- UK inflation data - Consumer Prices Index (CPI, CPIH), Retail Prices Index (RPI)
- UK economy forecasts - Office for Budget Responsibility: Economic and fiscal outlook
- Footfall data (town centres, large retail outlets and car parks).

### **Limitations of the Model**

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.

### **Staying Visitors**

Data on domestic overnight visits is based on a new combined online survey that replaced the separate Great Britain Tourism Survey and Great Britain Day Visits Survey. It 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 International Passenger Survey (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 a new combined online survey that replaced the separate Great Britain Tourism Survey and Great Britain Day Visits Survey. The new 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 above-mentioned surveys offer a 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.

**Produced by:**



Registered in England No. 9096970  
VAT Registration No. GB 192 3576 85

45 Colchester Road  
Manningtree  
CO11 2BA

Sergi Jarques  
Director  
Tel: 01206 392528  
[info@destinationresearch.co.uk](mailto:info@destinationresearch.co.uk)  
[www.destinationresearch.co.uk](http://www.destinationresearch.co.uk)