Commissioned by:

Visit Kent

Economic Impact of Tourism

Medway - 2015 Results

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Destination Research
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Introduction

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2015 and provides comparative data against the other districts in Kent as well as against the previously published data (2013).

The results are derived using the Cambridge Economic Impact Model. The 2013 figures were produced by Tourism South East (TSE) and the report compiled by The South West Research Company (TSWRC). Destination Research was commissioned by Visit Kent to replicate the 2013 model template and to produce 2015 results based on the latest data from national tourism surveys and regionally/locally based data.

In its basic form, the model distributes regional activity as measured in national surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level. Whenever possible, results have been enhanced by building in additional local-level data gathered by the district (e.g. local attractions data, boat moorings, language schools in the area, car parking data, accommodation stock, etc.).

Contextual analysis

Domestic tourism

In 2015, British residents took 102.7 million overnight trips in England, totalling 300 million nights away from home, with an expenditure of £19.6 billion. £191 was spent per trip, and with an average trip length of 2.92 nights, the average spend per night was £65. The number of domestic trips was 1% higher than in 2013, and the amount spent also increased, up 5% higher than in 2013, reaching an all-time high in nominal terms.

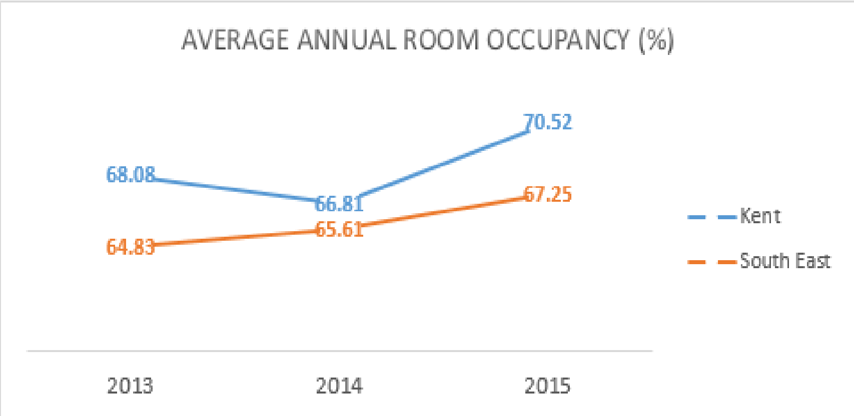
The South East region experienced a 6% drop in overnight trips between 2013 and 2015. Bednights were down 8% on 2013 and expenditure was down by 3%. The region received slightly less visitors in 2015 than in 2013. However, those who did visit spent more per night than in 2013. The average spend per night was up from £53.2 per night in 2013 to £56.53 in 2015.

Domestic visits to Kent

The domestic tourism results for Kent used in this model combine a mixture of supply and demand data. We do this because extracting county level data from national surveys can sometimes lead to inaccurate results due to low sample sizes. According to the GB Tourism Survey (demand side), Kent experienced a 4% decrease in the volume of trips between 2013 and 2015. Nights were down 8% and expenditure was also down by 6%.

However, the supply analysis, based on serviced accommodation occupancy data shows an increase of 2.4% in room occupancy between 2013 (68.1%) and 2015 (70.5). By combining the supply and demand results we estimate that trips to Kent were up by a marginal rate of 0.5%, nights per trip were down by 3% and expenditure stayed unchanged.

Please note that the Cambridge Model uses three year rolling averages to reduce some of the more extreme fluctuations which are due to small sample sizes and high margins or error.



Visits from overseas

At national level, the number of visits in 2015 grew by 5% to a record 36.1 million, after several years of growth since 2010. Average spend per visit was £611 in 2015, down from the peak of £650 per visit in 2013 and reflecting the relative strength of sterling in 2015. The number of visitor nights spent in the UK increased by 3% in 2015 to 273 million, with the average number of nights per visit standing at 7.6.

Overseas trips to the South England region were 13% up on 2013 to reach 5.1 million overnight trips. The total number of nights was down by 18% to reach 37.35 million in 2015. Spend was also up 12% to £2.24bn in 2015.

Kent also experienced growth between 2013 and 2015. Trips were up 8%, nights per trip went up 16% and expenditure was also up by 3%. As with domestic tourism, the Cambridge Model uses three year averages. The percentage change between 2013 and 2015 used in the model is as follows: trips up 8%, nights per trip up 16% and expenditure up by 4%.

The International Passenger Survey (IPS) is conducted by Office for National Statistics and is based on face- to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland.

The number of interviews conducted in England in 2015 was around 35,000. This large sample size allows reliable estimates to be produced for various groups of passengers despite the low proportion of travellers interviewed. The IPS provides headline figures, based on the county or unitary authority, for the volume and value of overseas trips to the UK.

How accurate is the Regional data?

The regional data extracted from national surveys has to be interpreted with lots of caution, as it has never been designed to be able to produce highly accurate results at regional level or be disaggregated to County level. Whilst the survey gives good precision at the national level, regional breakdowns of the data will almost inevitably lead to less reliable results as margins of error for visits can be as high as 40%. The national survey data is a key driver for the Cambridge model and as outlined above, needs to be used with caution when looking at regional level data. We have applied a 3 year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends. We also combine the demand data with supply-side results (occupancy levels, visits to visitor attractions).

Day visitors

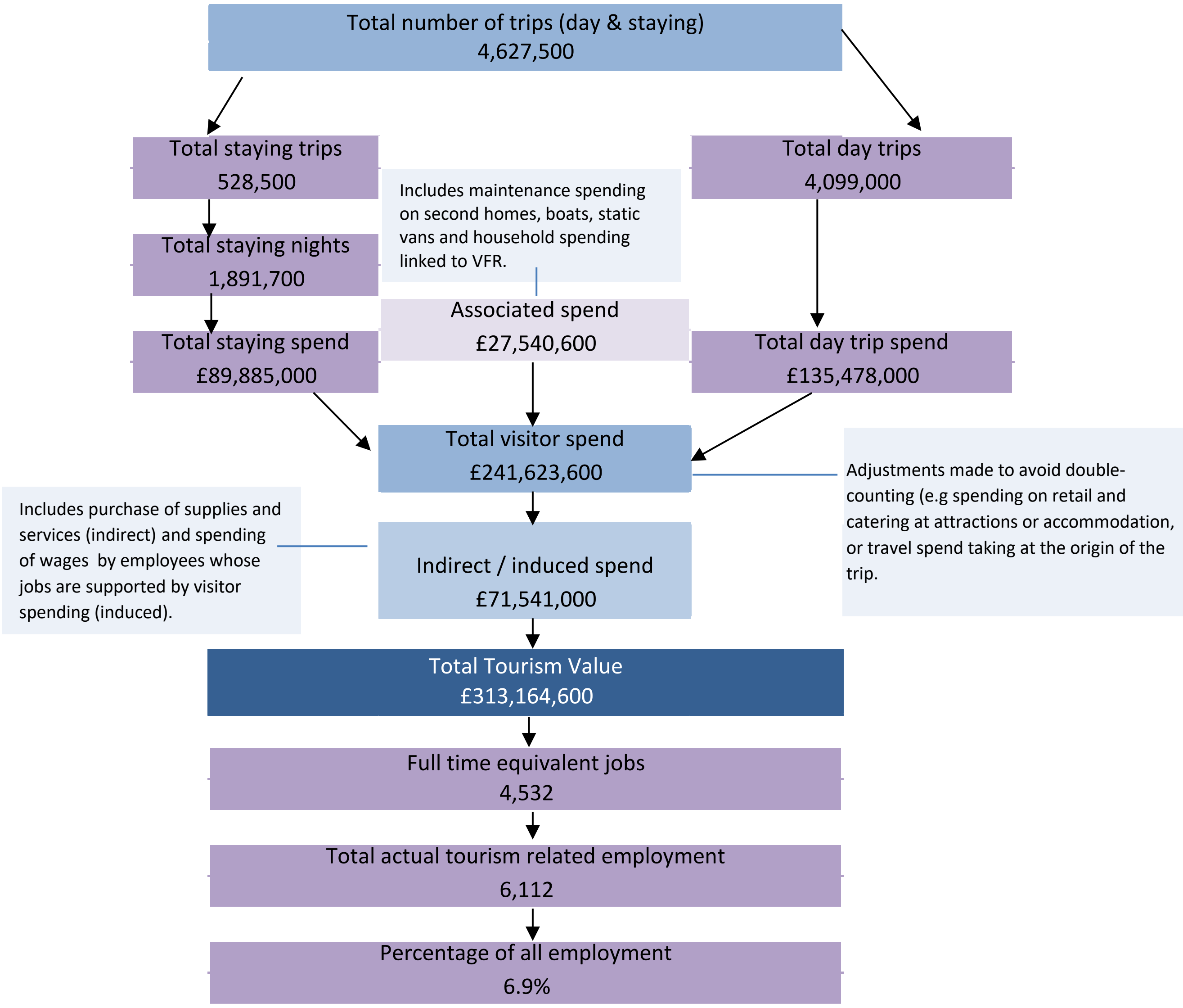
During 2015, GB residents took a total of 1,525 million Tourism Day Visits to destinations in England, Scotland or Wales. Around £54 billion was spent during these trips. The largest proportion of visits were taken to destinations in England (1,298 million visits or 85% of the total) while 8% of visits (124 million) were taken to Scottish destinations and 5% to places in Wales (75 million). The distribution of expenditure during visits broadly reflects this pattern.

The regional distribution of visits generally reflects the population distribution with the notable exception of London which is the destination for 18% of visits but place of residence for just 13% of the population. Within the English regions, the highest volume of visits was taken in London (280 million visits) where the total value of day visits during 2015 was around £11.6 billion.

The volume and value of Tourism Day Visits in the South East of England decreased between 2013 and 2015 from 219 million to 216 million with a 7% decrease in expenditure (down to £6.6 billion). The same survey would indicate that tourism day trips to Kent were up 3% between 2013 and 2015. Expenditure shows a decrease of 11%. The Visits to Visitor Attractions Survey shows that the volume of visitors to fee paying attractions in the South East was up by 5% between 2013 and 2015. Results for Kent show an increase of 3%.

We have used changes in admission charges as well as gross revenue levels to estimate likely visitor expenditure levels. The results show an approximate 5% increase in both admission fees and gross revenue. Based on these results the model assumes day trips to be up 3% and expenditure to remain relatively unchanged at +0.5%, meaning that expenditure per trip has decreased between 2013 and 2015.

Economic Impact of Tourism – Headline Figures   Medway - 2015 Results



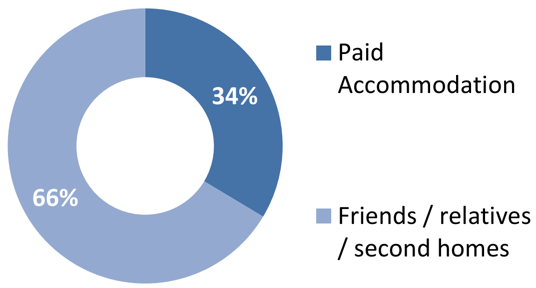
Economic Impact of Tourism – Year on year comparisons   Medway

Day Trips	2013	2015	Annual variation
Day trips Volume	3,980,000	4,099,000	3.0%
Day trips Value	£134,590,000	£135,478,000	0.7%
Overnight trips			
Number of trip	517,000	528,500	2.2%
Number of nights	1,872,000	1,891,700	1.1%
Trip value	£89,332,000	£89,885,000	0.6%
Total Value	£303,583,000	£313,164,600	3.2%
Actual Jobs	5,812	6,112	5.2%

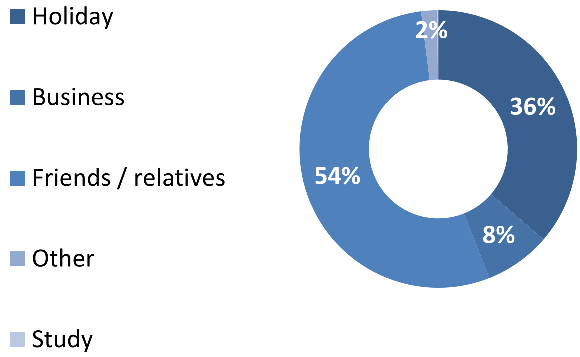
Medway	2013	2015	Variation
Average length stay (nights x trip)	3.62	3.59	-0.9%
Spend x overnight trip	£ 172.79	£ 170.38	-1.4%
Spend x night	£ 47.72	£ 47.50	-0.5%
Spend x day trip	£ 33.82	£ 33.05	-2.3%

Economic Impact of Tourism – Headline Figures Medway - 2015 Results

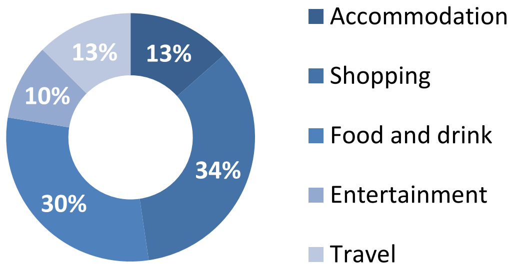
Trips by type of accommodation



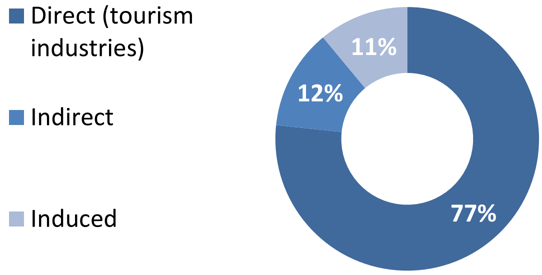
Trips by Purpose



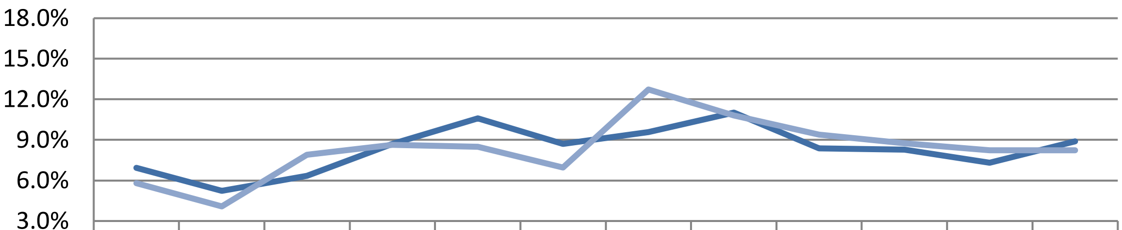
Breakdown of expenditure



Type of employment

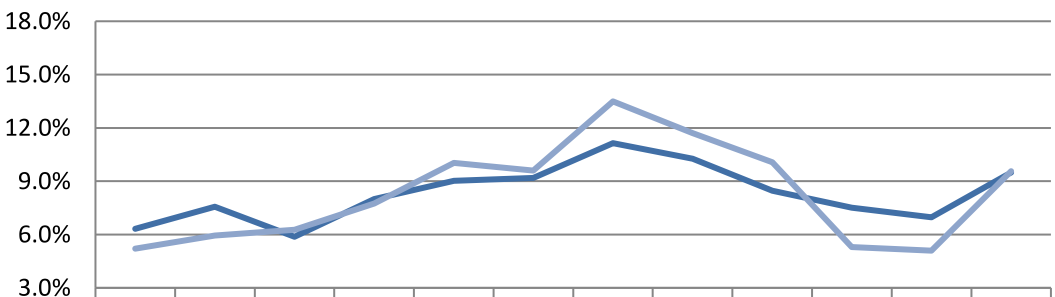


Seasonality - Day visitors (County level)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day trips	6.9%	5.2%	6.3%	8.7%	10.6%	8.7%	9.6%	11.0%	8.4%	8.3%	7.3%	8.9%
Day spend	5.8%	4.1%	7.9%	8.6%	8.5%	7.0%	12.7%	10.8%	9.4%	8.8%	8.2%	8.2%

Seasonality - Overnight visitors (County level)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overnight trips	6.3%	7.6%	5.9%	8.0%	9.0%	9.2%	11.1%	10.3%	8.5%	7.5%	7.0%	9.5%
Overnight spend	5.2%	5.9%	6.3%	7.7%	10.0%	9.6%	13.5%	11.7%	10.1%	5.3%	5.1%	9.6%

Volume of Tourism

Staying visits in the county context

Staying trips in the county context

District	Domestic trips ('000)	Overseas trips ('000)
Ashford	286	106
Canterbury	470	179
Dartford	137	44
Dover	341	83
Gravesham	151	38
Maidstone	293	80
Medway	430	98
Sevenoaks	170	61
Shepway	400	73
Swale	358	41
Thanet	351	143
Tonbridge&Malling	193	47
Tunbridge Wells	251	62

Staying nights in the county context

District	Domestic nights ('000)	Overseas nights ('000)
Ashford	771	457
Canterbury	1,438	1,233
Dartford	392	215
Dover	976	479
Gravesham	396	219
Maidstone	761	480
Medway	1,272	620
Sevenoaks	441	317
Shepway	1,004	394
Swale	1,262	290
Thanet	993	1,066
Tonbridge&Malling	554	281
Tunbridge Wells	765	400

Expenditure in the county context

District	Domestic spend (millions)	Overseas spend (millions)
Ashford	£44	£28
Canterbury	£77	£69
Dartford	£19	£11
Dover	£64	£25
Gravesham	£16	£9
Maidstone	£39	£28
Medway	£61	£29
Sevenoaks	£23	£18
Shepway	£62	£20
Swale	£45	£11
Thanet	£54	£68
Tonbridge&Malling	£25	£12
Tunbridge Wells	£41	£20

Staying Visitors - Accommodation Type

Medway - 2015 Results

Trips by Accommodation

	UK		Overseas		Total	
Serviced	101,000	23%	30,000	31%	131,000	25%
Self catering	1,000	0%	0	0%	1,000	0%
Camping	15,000	3%	2,000	2%	17,000	3%
Static caravans	14,000	3%	0	0%	14,000	3%
Group/campus	1,000	0%	3,000	3%	4,000	1%
Paying guest	0	0%	2,000	2%	2,000	0%
Second homes	7,000	2%	1,000	1%	8,000	2%
Boat moorings	5,000	1%	0	0%	5,000	1%
Other	1,000	0%	1,000	1%	2,000	0%
Friends & relatives	286,000	67%	57,000	58%	343,000	65%
Total 2015	**430,000**		**97,500**		**527,500**	
Comparison 2013	**425,000**		**92,000**		**517,000**	
Difference	**1%**		**6%**		**2%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	324,000	25%	75,000	12%	399,000	21%
Self catering	5,000	0%	5,000	1%	10,000	1%
Camping	84,000	7%	11,000	2%	95,000	5%
Static caravans	68,000	5%	0	0%	68,000	4%
Group/campus	6,000	0%	25,000	4%	31,000	2%
Paying guest	0	0%	11,000	2%	11,000	1%
Second homes	23,000	2%	10,000	2%	33,000	2%
Boat moorings	24,000	2%	0	0%	24,000	1%
Other	6,000	0%	2,000	0%	8,000	0%
Friends & relatives	733,000	58%	480,000	77%	1,213,000	64%
Total 2015	**1,272,000**		**620,000**		**1,892,000**	
Comparison 2013	**1,290,000**		**582,000**		**1,872,000**	
Difference	**-1%**		**7%**		**1%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£36,425,000	60%	£8,532,000	30%	£44,957,000	50%
Self catering	£235,000	0%	£188,000	1%	£423,000	0%
Camping	£2,214,000	4%	£472,000	2%	£2,686,000	3%
Static caravans	£1,844,000	3%	£0	0%	£1,844,000	2%
Group/campus	£63,000	0%	£1,426,000	5%	£1,489,000	2%
Paying guest	£0	0%	£797,000	3%	£797,000	1%
Second homes	£417,000	1%	£367,000	1%	£784,000	1%
Boat moorings	£445,000	1%	£0	0%	£445,000	0%
Other	£329,000	1%	£47,000	0%	£376,000	0%
Friends & relatives	£19,132,000	31%	£16,952,000	59%	£36,084,000	40%
Total 2015	**£61,104,000**		**£28,772,000**		**£89,876,000**	
Comparison 2013	**£61,275,000**		**£28,057,000**		**£89,332,000**	
Difference	**0%**		**3%**		**1%**	

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		161,000	37%	30,400	31%	191,400	36%
Business		36,000	8%	4,700	5%	40,700	8%
Friends & relatives		228,000	53%	56,800	58%	284,800	54%
Other		5,000	1%	4,900	5%	9,900	2%
Study		0	0%	600	1%	600	0%
Total	**2015**	**431,000**		**97,500**		**528,500**	
Comparison	**2013**	**425,000**		**92,000**		**517,000**	
Difference		**1%**		**6%**		**2%**	

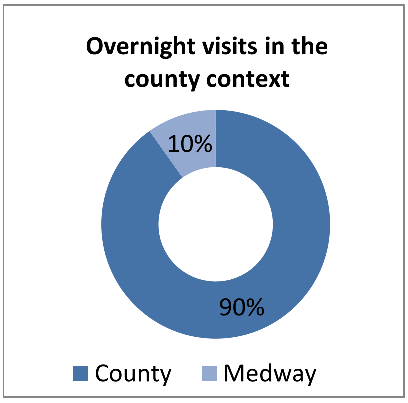
Nights by Purpose

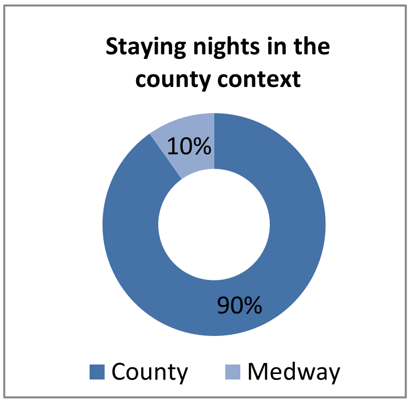
		UK		Overseas		Total	
Holiday		619,000	49%	141,700	23%	760,700	40%
Business		130,000	10%	15,700	3%	145,700	8%
Friends & relatives		507,000	40%	425,700	69%	932,700	49%
Other		16,000	1%	21,000	3%	37,000	2%
Study		0	0%	15,600	3%	15,600	1%
Total	**2015**	**1,272,000**		**619,700**		**1,891,700**	
Comparison	**2013**	**1,290,000**		**582,000**		**1,872,000**	
Difference		**-1%**		**6%**		**1%**	

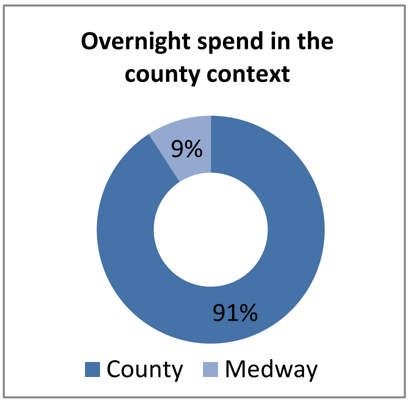
Spend by Purpose

		UK		Overseas		Total	
Holiday		£34,513,000	56%	£13,665,000	47%	£48,178,000	54%
Business		£17,998,000	29%	£1,652,000	6%	£19,650,000	22%
Friends & relatives		£8,136,000	13%	£9,996,000	35%	£18,132,000	20%
Other		£456,000	1%	£2,100,000	7%	£2,556,000	3%
Study		£0	0%	£1,368,000	5%	£1,368,000	2%
Total	**2015**	**£61,104,000**		**£28,781,000**		**£89,885,000**	
Comparison	**2013**	**£61,275,000**		**£28,057,000**		**£89,332,000**	
Difference		**0%**		**3%**		**1%**	

Proportion of staying visits in the county context





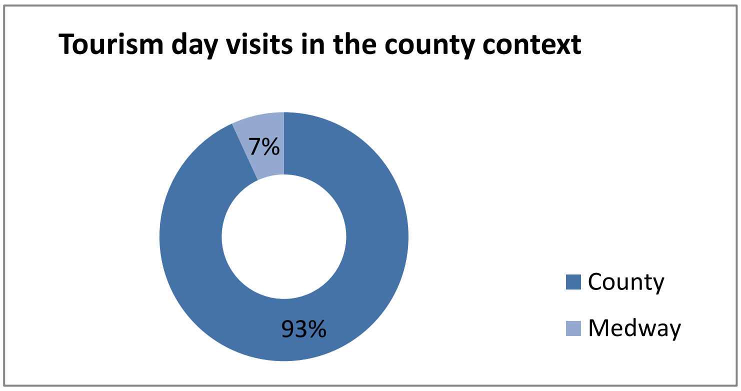


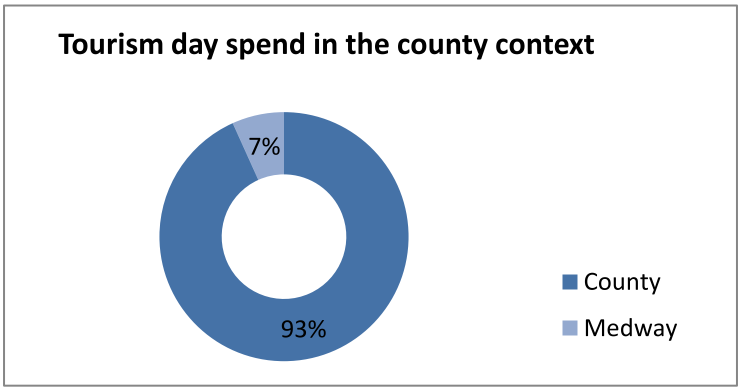
Total Volume and Value of Day Trips

		Trips	Spend
Total	**2015**	**4,099,000**	**£135,478,000**
Comparison	2013	3,980,000	£134,590,000
Difference		3%	1%

Day Visitors in the county context

District	Day Visits (millions)	Day visit Spend (millions)
Ashford	3.9	£133.9
Canterbury	6.6	£215.2
Dartford	9.7	£380.8
Dover	3.9	£116.0
Gravesham	1.7	£49.7
Maidstone	3.8	£122.0
Medway	4.1	£135.5
Sevenoaks	3.7	£134.0
Shepway	4.1	£122.9
Swale	4.6	£137.3
Thanet	3.4	£119.4
Tonbridge&Malling	2.6	£81.4
Tunbridge Wells	4.1	£146.5



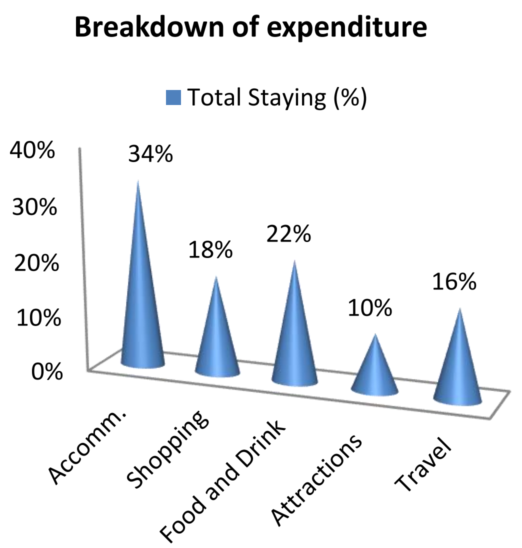


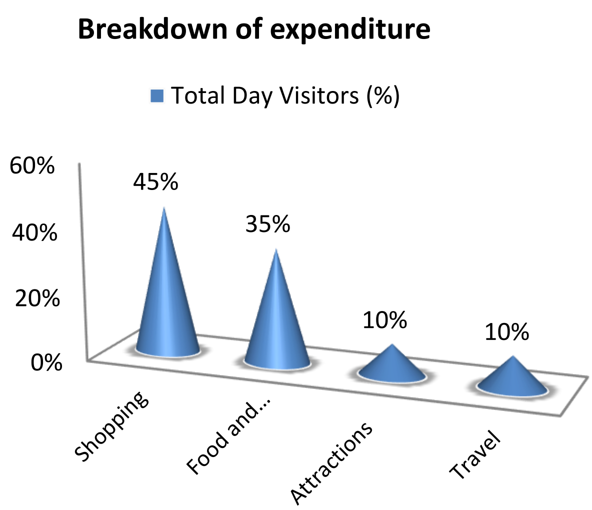
Value of Tourism

Expenditure Associated with Trips Medway - 2015 Results

Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£22,386,000	£7,498,000	£13,227,000	£6,169,000	£11,824,000	£61,104,000
Overseas tourists	£7,965,000	£8,479,000	£6,464,000	£3,044,000	£2,829,000	£28,781,000
Total Staying	£30,351,000	£15,977,000	£19,691,000	£9,213,000	£14,653,000	£89,885,000
Total Staying (%)	34%	18%	22%	10%	16%	100%
Total Day Visitors	£0	£61,101,000	£47,688,000	£13,141,000	£13,548,000	£135,478,000
Total Day Visitors (%)	0%	45%	35%	10%	10%	100%
Total 2015	**£30,351,000**	**£77,078,000**	**£67,379,000**	**£22,354,000**	**£28,201,000**	**£225,363,000**
%	**13%**	**34%**	**30%**	**10%**	**13%**	**100%**
Comparison 2013	**£29,908,000**	**£76,601,000**	**£67,017,000**	**£22,303,000**	**£28,093,000**	**£223,922,000**
Difference	**1%**	**1%**	**1%**	**0%**	**0%**	**1%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£362,000	£2,062,500	£2,100	£25,114,000	£27,540,600

Spend on second homes is assumed to be an average of £2,000 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,000 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 £2,000. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £175 per visit has been assumed based on national research for social and personal visits.

Direct Turnover Derived From Trip

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		£30,745,000	£954,000	£31,699,000
Retail		£15,817,000	£60,490,000	£76,307,000
Catering		£19,100,000	£46,258,000	£65,358,000
Attractions		£9,569,000	£14,229,000	£23,798,000
Transport		£8,792,000	£8,129,000	£16,921,000
Non-trip spend		£27,540,600	£0	£27,540,600
Total Direct	**2015**	**£111,563,600**	**£130,060,000**	**£241,623,600**
Comparison	**2013**	**£102,909,000**	**£131,501,000**	**£234,410,000**
Difference		**8%**	**-1%**	**3%**

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		£14,639,000	£20,853,000	£35,492,000
Non trip spending		£4,131,000	£0	£4,131,000
Income induced		£16,263,000	£15,655,000	£31,918,000
Total	**2015**	**£35,033,000**	**£36,508,000**	**£71,541,000**
Comparison	**2013**	**£34,279,000**	**£34,894,000**	**£69,173,000**
Difference		**2%**	**5%**	**3%**

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		£111,563,600	£130,060,000	£241,623,600
Indirect		£35,033,000	£36,508,000	£71,541,000
Total Value	**2015**	**£146,596,600**	**£166,568,000**	**£313,164,600**
Comparison	**2013**	**£142,554,000**	**£161,029,000**	**£303,583,000**
Difference		**3%**	**3%**	**3%**

Employment

Employment

Medway - 2015 Results

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 visitor spending.

Direct employment

Full time equivalent (FTE)						
	Staying Visitor		Day Visitor		Total	
Accommodation	529	31%	16	1%	546	17%
Retailing	154	9%	589	37%	743	23%
Catering	312	18%	755	48%	1,067	33%
Entertainment	104	6%	155	10%	260	8%
Transport	75	4%	70	4%	145	4%
Non-trip spend	520	31%	0	0%	520	16%
Total FTE 2015	**1,695**		**1,585**		**3,280**	
Comparison 2013	**1,635**		**1,575**		**3,210**	
Difference	**4%**		**1%**		**2%**	

Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Accommodation	784	34%	24	1%	808	17%
Retailing	231	10%	883	37%	1,114	24%
Catering	468	20%	1,133	48%	1,600	34%
Entertainment	147	6%	219	9%	366	8%
Transport	106	5%	98	4%	204	4%
Non-trip spend	593	25%	0	0%	593	13%
Total Actual 2015	**2,328**		**2,357**		**4,686**	
Comparison 2013	**2,257**		**2,342**		**4,599**	
Difference	**3%**		**1%**		**2%**	

Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	313	348	660
Induced jobs	301	290	591
Total FTE 2015	**614**	**637**	**1,251**
Comparison 2013	**509**	**555**	**1,064**
Difference	**21%**	**15%**	**18%**

Estimated actual jobs			
	Staying Visitor	Day Visitors	Total
Indirect jobs	357	396	753
Induced jobs	343	330	674
Total Actual 2015	**700**	**727**	**1,427**
Comparison 2013	**580**	**633**	**1,213**
Difference	**21%**	**15%**	**18%**

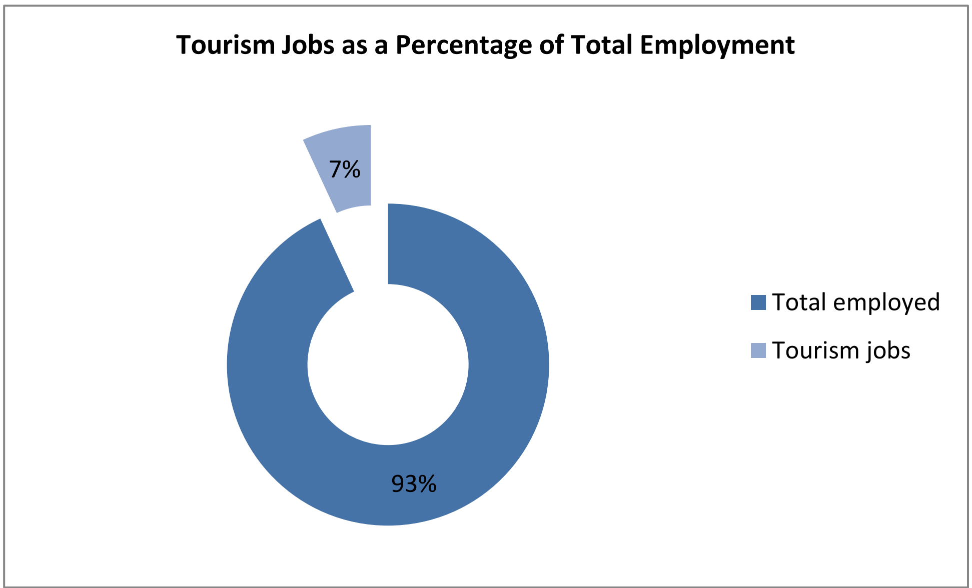
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Direct		1,695	73%	1,585	71%	3,280	72%
Indirect		313	14%	348	16%	660	15%
Induced		301	13%	290	13%	591	13%
Total FTE	**2015**	**2,309**		**2,223**		**4,532**	
Comparison	2013	2,144		2,130		4,274	
Difference		8%		4%		6%	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Direct		2,328	77%	2,357	76%	4,686	77%
Indirect		357	12%	396	13%	753	12%
Induced		343	11%	330	11%	674	11%
Total Actual	**2015**	**3,028**		**3,084**		**6,112**	
Comparison	2013	2,837		2,975		5,812	
Difference		7%		4%		5%	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day visitors	Total
Total employed		88,500	88,500	88,500
Tourism jobs		3,028	3,084	6,112
Proportion all jobs		**3%**	**3%**	**7%**
Comparison	2013	2,837	2,975	5,812
Difference		7%	4%	5%



Economic Impact of Tourism – Headline Figures Medway - 2015 Results

The key 2015 results of the Economic Impact Assessment are:

4.6 million trips were undertaken in the area
4.1 million day trips
0.5 million overnight visits

1.9 million nights in the area as a result of overnight trips

£242 million spent by tourists during their visit to the area
£20 million spent on average in the local economy each month.

£90 million generated by overnight visits
£135 million generated from day trips.

£313 million spent in the local area as result of tourism, taking into account multiplier effects.

6,112 jobs supported, both for local residents from those living nearby.
4,686 tourism jobs directly supported
1,427 non-tourism related jobs supported linked to multiplier spend from tourism.

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 varies. 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. In some tables there may therefore 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- 2014 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, attrcations, 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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