Economic Impact of Tourism

2022 Results

Commissioned by:

Visit Kent

Economic Impact of Tourism

Kent - 2022 Results

November 2023

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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 2022 and provides comparative data against the previously published data for 2021, as well as providing headline comparisons against 2019 in order to monitor the recovery from the COVID-19 pandemic.

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 districts.

Results for 2022

After two years where there was very limited access to data, the 2022 results are based on the key national tourism surveys, which have recently been fully operational and upgraded.

Overall, the balance of domestic versus overseas travel is becoming closer to pre-pandemic levels, but financial pressures mean that domestic trips were preferred, so an element of staycation preference still remains. Inbound visits to the UK continued to recover to pre-pandemic levels. Overall, the 2022 results will show significant improvements compared to 2021, although they are still behind the level of spending seen in 2019.

Domestic tourism

GB Day Visits Survey (Day visits)

Overall in 2022, there were 945 million Tourism Day Visits in England with Q3 and Q4 seeing the highest volume of visits. Throughout all 12 months of 2022, visitors spent £38.7 billion. The last two quarters of 2022 accounted for the highest spent.

In the latter 9 months of 2021, British residents took a total of 545 million tourism day visits within England and spent £21.19 billion on these trips. In 2022, as COVID-19 restrictions came to a halt in all nations, domestic day trips picked up 41% to reach 772 million Tourism Day Visits from April to December 2022, whilst spend was up 46% to £31.2 billion. The average spend on Tourism Day Visits in England in the last 9 months of 2021 was £39, increasing by 4% in 2022 to £40.

GB Day Visits Survey (Day visits) - Continued

The South East of England registered 162 million tourism day trips made by British residents between January to December 2022. These trips accounted for a total of £5.86 billion in spend.

The South East of England as a destination shows an increase in both volume and value in the latter 9 months of 2022 vs 2021. The volume of trips increased by 41% and the total spend by 47%.

GB Tourism Survey (Overnight visits)

England registered 107 million overnight trips made by British residents between January to December 2022. These trips accounted for a total of 316 million nights and contributed a total of £27.6 billion in spend.

In 2022, overnight trips in England had an average length of 3 nights, with an average spend per trip of £258 and average spend of £87 per night. England shows an increase in both volume and value in the latter 9 months of 2022 vs 2021. The volume of trips increased by 16% and the total spend by 36%.

South East of England registered 15.8 million overnight trips made by British residents between January to December 2022. These trips accounted for a total of 46 million nights and contributed a total of £3.52 billion in spend. The South East of England as a destination shows an increase in both volume and value in 2022 vs 2021. The volume of trips increased by 12% and the total spend by 41%.

International Passenger Survey (Overseas tourism)

Visits to England

Inbound visits to England continued to recover to pre-pandemic levels (i.e. 2019), following two years of extremely low visits due to the impact of COVID-19. England hosted a little over 29.3 million international visits in 2022, 24% fewer than in 2019. Visitors spent £22.6 billion in 2022 in nominal terms, without taking inflation into account, 9% below the record spend set in 2019 (18% in real terms).

South East

Visits to the South East made by international visitors in 2022 were down 32% on 2019 results at 3.6 million. Visitors spent £2.3 billion in the region in 2022, 11% below the record spend set in 2019 (in nominal terms, and 21% real terms).

Comparability

The cost of living increased sharply across the UK during 2022 and the average annual inflation rate for 2022 was 8.0%. The Cambridge Model normally reports expenditure levels in nominal terms (not taking inflation into account). However, due to the unusually high levels of inflation, we have also considered real terms values (adjusted for inflation) when preparing the results, in order to provide a more accurate assessment of the post-pandemic tourism recovery levels.

The domestic tourism statistics are based on a new combined online survey that replaces the separate Great Britain Tourism Survey and Great Britain Day Visits Survey that ran until 2019. From 2021 definition and survey methodology changes have been introduced meaning that results published for April 2021 onwards are not directly comparable with data published for 2019 and previous years. In order to gain as complete a picture of domestic tourism as possible, we have used data from a number of different information sources:

Visits to Visitor Attractions

An audit of English visitor attractions, recording visitor numbers since 2000.

England - Admissions volume	2019	2020	2021	2022
Number of visits (million)	257.52	90.13	117.17	166.52
% difference from 2019 visit volume		-65%	-55%	-35%
South East				
% difference from 2019 visit volume		-58%	-51%	-41%

Accommodation Occupancy

Every month, the England Occupancy Survey (EOS) measures bedroom and bedspace occupancy across the serviced accommodation sector. It is possible that hotel occupancy measures overstate trips compared to previous years because of ongoing workforce shortages: As a result, some establishments closed on certain days or reduced 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.

Accommodation Occupancy - Room Occupancy - England		
Year	**Average annual room occupancy**	**Difference from 2019**
2019	78%	
2021	52%	-26%
2022	73%	-4%

Economic Impact of Tourism – Headline Figures Kent - 2022 Results

Total number of trips (day & staying)
60,805,800

Total staying trips
4,287,800

Total staying nights
15,255,500

Total staying spend
£819,298,000

Includes maintenance spending on second homes, boats, static vans and household spending linked to VFR.

Associated spend
£259,033,000

Total day trips
56,518,000

Total day trip spend
£2,048,030,000

Total visitor spend
£2,961,503,000

Adjustments made to avoid double-counting (e.g spending on retail and catering at attractions or accommodation, or travel spend taking at the origin of the trip.

Includes purchase of supplies and services (indirect) and spending of wages by employees whose jobs are supported by visitor spending (induced).

Indirect / induced spend
£814,224,000

Total Tourism Value
£3,775,727,000

Full time equivalent jobs
54,129

Total actual tourism related employment
74,462

Is it estimated that 3,686 actual jobs are supported by Bluewater, raising the total employment in that area to 9,451, or 14% of all employment in Dartford.

Percentage of all employment
10%

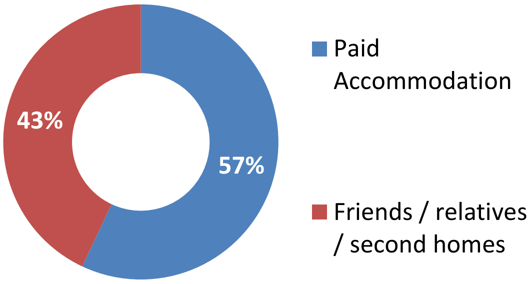
Economic Impact of Tourism – Year on year comparisons

Day Trips	2022	2021	2019	Year-on-year comparison 2022 v 2021	Pre-pandemic levels 2022 v 2019
Day trips Volume	56,518,000	48,270,000	61,660,000	17%	-8%
Day trips Value	£2,048,030,000	£1,451,539,000	£2,249,146,000	41%	-9%
Overnight trips					
Number of trips	4,287,800	3,212,200	4,862,000	33%	-12%
Number of nights	15,255,500	10,890,600	17,156,000	40%	-11%
Trip value	£819,298,000	£567,175,000	£899,379,000	44%	-9%
Total Value	**£3,775,727,000**	**£2,580,025,000**	**£4,148,318,200**	**46%**	**-9%**
Actual Jobs	**74,462**	**58,791**	**81,458**	**27%**	**-9%**

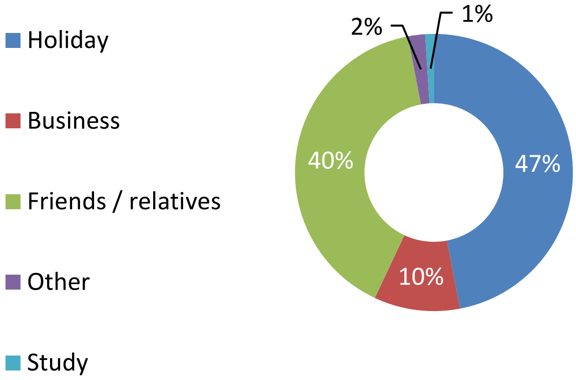
	2022	2021	2019	2022 v 2021	2022 v 2019
Average length stay (nights x trip)	3.56	3.39	3.53	5.0%	0.9%
Spend x overnight trip	£191.08	£176.57	£184.98	8.2%	3.3%
Spend x night	£53.71	£52.08	£52.42	3.1%	2.4%
Spend x day trip	£36.24	£30.07	£36.48	20.5%	-0.7%

Economic Impact of Tourism – Headline Figures   Kent - 2022 Results

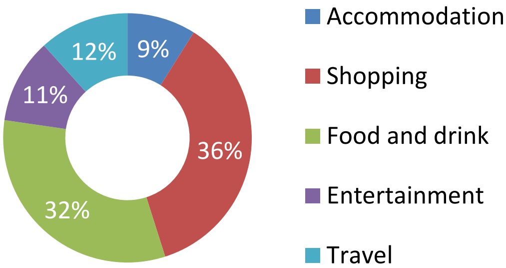
Trips by type of accommodation



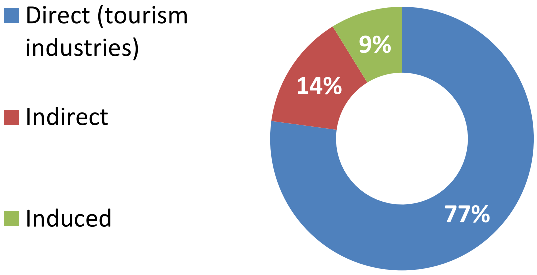
Trips by purpose



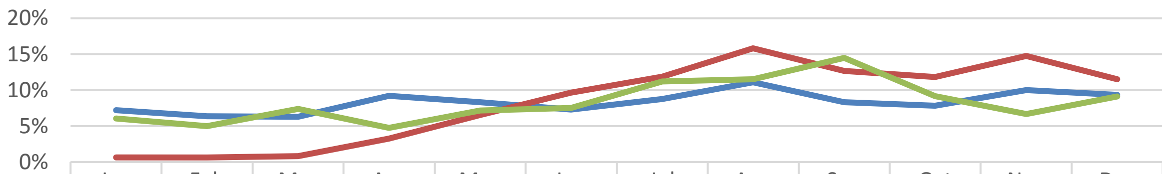
Breakdown of expenditure



Type of employment



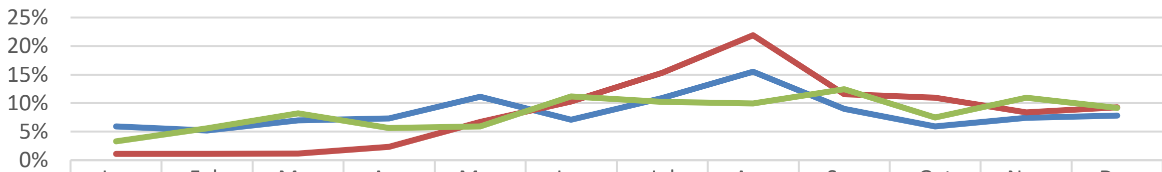
Seasonality - Day Trip Expenditure



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	7%	6%	6%	9%	8%	7%	9%	11%	8%	8%	10%	9%
2021	1%	1%	1%	3%	7%	10%	12%	16%	13%	12%	15%	12%
2022	6%	5%	7%	5%	7%	8%	11%	12%	14%	9%	7%	9%

2019 2021 2022

Seasonality - Overnight Expenditure



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	6%	5%	7%	7%	11%	7%	11%	16%	9%	6%	7%	8%
2021	1%	1%	1%	2%	7%	10%	15%	22%	12%	11%	8%	9%
2022	3%	6%	8%	6%	6%	11%	10%	10%	12%	7%	11%	9%

2019 2021 2022

Source: VisitBritain. Reference: South East England

Volume of Tourism

Staying visits in the county context   Kent - 2022 Results

All figures have been rounded and some tables may show a slight discrepancy between totals and sub totals.

Staying trips in the county context	Domestic trips ('000)	Overseas trips ('000)
Ashford	278	93.6
Canterbury	428	146.0
Dartford	134	25.4
Dover	300	83.0
Folkestone & Hythe	326	71.0
Gravesham	126	32.0
Maidstone	271	69.0
Medway	359	84.9
Sevenoaks	142	57.5
Swale	295	37.5
Thanet	319	115.1
Tonbridge and Malling	177	36.5
Tunbridge Wells	226	54.9
Kent	**3,381**	**906.4**

Staying nights - county context	Domestic nights ('000)	Overseas nights ('000)
Ashford	799	402.2
Canterbury	1,319	823.0
Dartford	424	73.0
Dover	913	389.0
Folkestone & Hythe	1,008	356.0
Gravesham	402	138.0
Maidstone	865	430.0
Medway	1,235	306.0
Sevenoaks	371	295.0
Swale	1,132	215.0
Thanet	955	756.3
Tonbridge and Malling	552	198.0
Tunbridge Wells	657	242.0
Kent	**10,632**	**4,623.5**

Staying spend - county context	Domestic spend (millions)	Overseas spend (millions)
Ashford	£48.7	£23.1
Canterbury	£67.7	£43.0
Dartford	£20.0	£5.1
Dover	£56.6	£21.7
Folkestone & Hythe	£61.4	£17.8
Gravesham	£17.6	£7.6
Maidstone	£42.5	£24.4
Medway	£51.1	£20.0
Sevenoaks	£22.4	£15.4
Swale	£44.3	£10.4
Thanet	£54.4	£55.2
Tonbridge and Malling	£25.2	£11.8
Tunbridge Wells	£36.7	£15.2
Kent	**£548.6**	**£270.7**

Staying Visitors - Accommodation Type   Kent - 2022 Results

Trips by Accommodation

	UK		Overseas		Total	
Serviced	1,119,600	33%	432,700	48%	1,552,300	36%
Self catering	233,500	7%	60,200	7%	293,700	7%
Camping	197,300	6%	43,900	5%	241,200	6%
Static caravans	146,100	4%	31,400	3%	177,500	4%
Group/campus	38,000	1%	21,300	2%	59,300	1%
Paying guest	0	0%	8,600	1%	8,600	0%
Second homes	55,400	2%	19,300	2%	74,700	2%
Boat moorings	34,000	1%	0	0%	34,000	1%
Other	65,800	2%	15,400	2%	81,200	2%
Friends & relatives	1,491,600	44%	273,600	30%	1,765,200	41%
Total 2022	**3,381,300**		**906,400**		**4,287,700**	
Comparison 2021	**2,889,800**		**322,400**		**3,212,200**	
Difference	**17%**		**181%**		**33%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	2,860,200	27%	1,035,600	22%	3,895,800	26%
Self catering	479,900	5%	688,900	15%	1,168,800	8%
Camping	623,700	6%	155,600	3%	779,300	5%
Static caravans	894,200	8%	95,200	2%	989,400	6%
Group/campus	123,200	1%	159,300	4%	282,500	2%
Paying guest	0	0%	130,200	3%	130,200	1%
Second homes	214,800	2%	158,200	3%	373,000	2%
Boat moorings	259,100	3%	0	0%	259,100	2%
Other	244,800	2%	83,000	2%	327,800	2%
Friends & relatives	4,932,100	46%	2,117,500	46%	7,049,600	46%
Total 2022	**10,632,000**		**4,623,500**		**15,255,500**	
Comparison 2021	**9,241,000**		**1,649,600**		**10,890,600**	
Difference	**15%**		**180%**		**40%**	

Spend by Accommodation

	UK		Overseas		Total	
Serviced	£317,560,200	58%	£110,489,400	41%	£428,049,600	52%
Self catering	£32,423,100	6%	£31,447,100	12%	£63,870,200	8%
Camping	£15,705,100	3%	£6,617,000	3%	£22,322,100	3%
Static caravans	£28,448,100	5%	£5,319,000	2%	£33,767,100	4%
Group/campus	£3,265,000	1%	£8,867,100	3%	£12,132,100	1%
Paying guest	£0	0%	£9,309,100	3%	£9,309,100	1%
Second homes	£8,266,000	1%	£6,149,000	2%	£14,415,000	2%
Boat moorings	£6,616,000	1%	£0	0%	£6,616,000	1%
Other	£21,115,100	4%	£9,032,000	3%	£30,147,100	4%
Friends & relatives	£115,239,400	21%	£83,430,300	31%	£198,669,700	24%
Total 2022	**£548,638,000**		**£270,660,000**		**£819,298,000**	
Comparison 2021	**£477,085,000**		**£90,090,000**		**£567,175,000**	
Difference	**15%**		**200%**		**44%**	

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

Kent - 2022 Results

Trips by Purpose

		UK		Overseas		Total	
Holiday		1,690,700	50%	344,400	38%	2,035,100	47%
Business		236,600	7%	190,200	21%	426,900	10%
Friends & relatives		1,386,400	41%	317,200	35%	1,703,600	40%
Other		67,600	2%	18,300	2%	85,900	2%
Study		0	0%	36,300	4%	36,300	1%
Total	**2022**	**3,381,400**		**906,400**		**4,287,800**	
Comparison	**2021**	**2,889,800**		**322,400**		**3,212,200**	
Difference		**17%**		**181%**		**33%**	

Nights by Purpose

		UK		Overseas		Total	
Holiday		6,273,000	59%	1,340,800	29%	7,613,800	50%
Business		744,000	7%	508,600	11%	1,252,600	8%
Friends & relatives		3,402,000	32%	1,988,100	43%	5,390,100	36%
Other		213,000	2%	138,700	3%	351,700	2%
Study		0	0%	647,300	14%	647,300	4%
Total	**2022**	**10,632,000**		**4,623,500**		**15,255,500**	
Comparison	**2021**	**9,241,000**		**1,649,600**		**10,890,600**	
Difference		**15%**		**180%**		**40%**	

Spend by Purpose

		UK		Overseas		Total	
Holiday		£351,129,000	64%	£97,438,000	36%	£448,567,000	55%
Business		£76,809,000	14%	£32,478,000	12%	£109,287,000	13%
Friends & relatives		£87,782,000	16%	£97,438,000	36%	£185,220,000	23%
Other		£32,918,000	6%	£13,533,000	5%	£46,451,000	6%
Study		£0	0%	£29,773,000	11%	£29,773,000	3%
Total	**2022**	**£548,638,000**		**£270,660,000**		**£819,298,000**	
Comparison	**2021**	**£477,085,000**		**£90,090,000**		**£567,175,000**	
Difference		**15%**		**200%**		**44%**	

Overseas Overnight Visitors to Kent - National ranking by volume and value of visits

Top 10 nations by volume of Visits (000s)		Top 10 nations by volume of spend (£m)	
France	69.7	USA	£51.37
Germany	67.9	Germany	£26.63
Netherlands	61.8	France	£25.00
USA	59.3	Spain	£20.39
Poland	50.9	Switzerland	£15.63
Spain	31.6	Netherlands	£15.41
Irish Republic	27.6	Australia	£14.30
Belgium	25.6	Qatar	£14.02
Romania	24.0	UAE	£11.24
Switzerland	22.0	Nigeria	£10.73

Source: International Passenger Survey - Kent, 2022

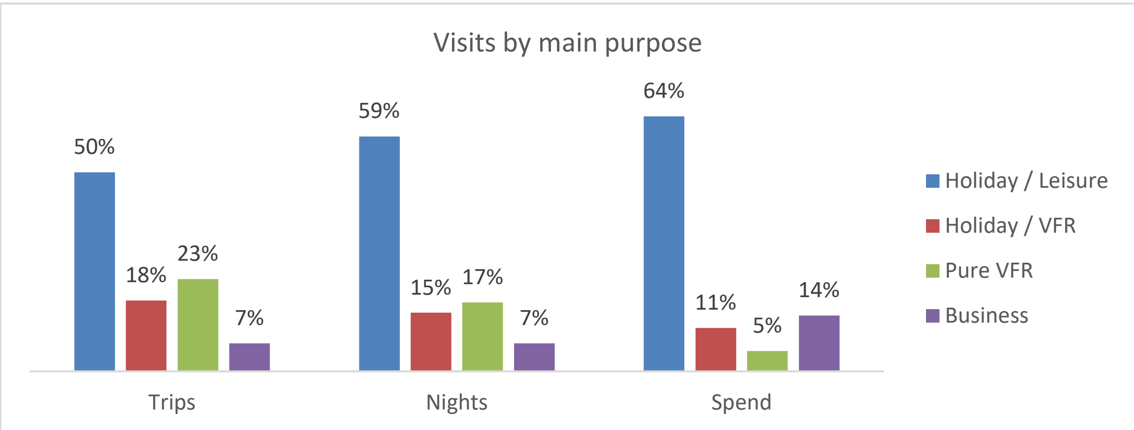
Domestic Overnight Visitors - Purpose of Trip   Kent - 2022 Results

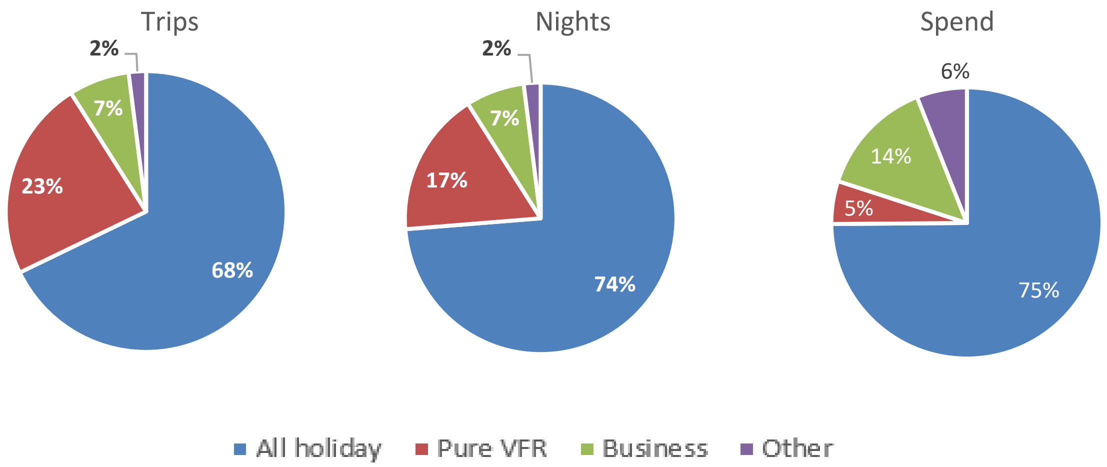
Total holiday trips include visits to destinations in Kent for pleasure / leisure purposes staying with friends and relatives. Pure VFR are visits to friends and relatives for social and personal reasons, and do not include holiday trips staying with friends and relatives.

	Trips		Nights		Expenditure	
Holiday / Leisure	1,690,700	50%	6,273,000	59%	£351,129,000	64%
Holiday / VFR	603,000	18%	1,565,000	15%	£59,692,000	11%
Pure VFR	783,300	23%	1,837,000	17%	£28,090,000	5%
Business	236,700	7%	744,000	7%	£76,809,000	14%
Other	67,700	2%	213,000	2%	£32,918,000	6%
Total	**3,381,400**		**10,632,000**		**£548,638,000**	

Holiday trips involving paid accommodation make up the largest proportion of domestic trips and incur the highest average spend per trip and night. Pure VFR trips (i.e. for social and personal reasons excluding holiday) are the shortest in length and are subject to the lowest levels of expenditure.

	Holiday / Leisure	Holiday / VFR	Pure VFR	Business
Average length stay (nights x trip)	3.7	2.6	2.3	3.1
Spend x overnight trip	£207.68	£98.99	£35.86	£324.50
Spend x night	£55.97	£38.14	£15.29	£103.24





Day Visitors   Kent - 2022 Results

Total Volume and Value of Day Trips

		Trips		Spend	
Urban visits		26,241,000	46%	£1,125,754,000	55%
Countryside visits		17,802,000	32%	£538,783,000	26%
Coastal visits		12,475,000	22%	£383,493,000	19%
Total	**2022**	**56,518,000**	**100%**	**£2,048,030,000**	**100%**
Comparison	**2021**	**48,270,000**		**£1,451,539,000**	
Difference		**17%**		**41%**	

Day Visitors in the county context

District	Day Visits (millions)	Day Visit Spend (millions)
Ashford	3.8	£140.2
Canterbury	7.2	£257.5
Dartford	8.7	£341.9
Dover	3.8	£124.9
Folkestone & Hythe	4.1	£136.2
Gravesham	1.9	£60.5
Maidstone	4.0	£152.6
Medway	4.1	£153.3
Sevenoaks	3.7	£142.5
Swale	4.8	£150.0
Thanet	3.8	£135.5
Tonbridge and Malling	2.6	£97.9
Tunbridge Wells	4.0	£155.0
Kent	**56.5**	**£2,048.0**

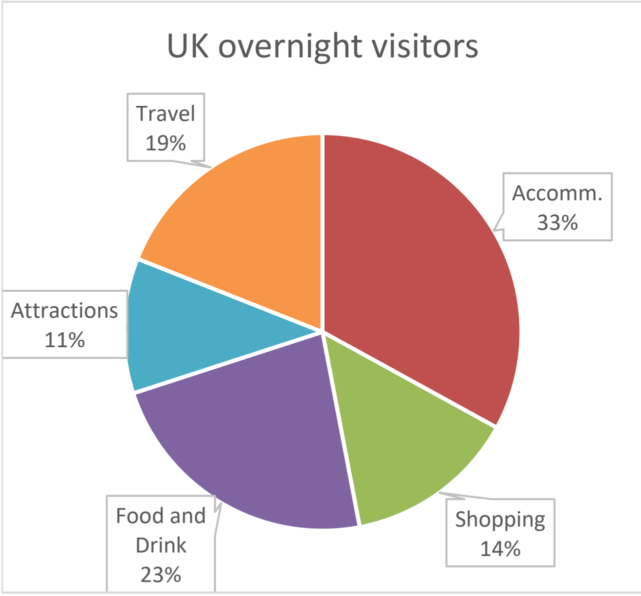
Value of Tourism

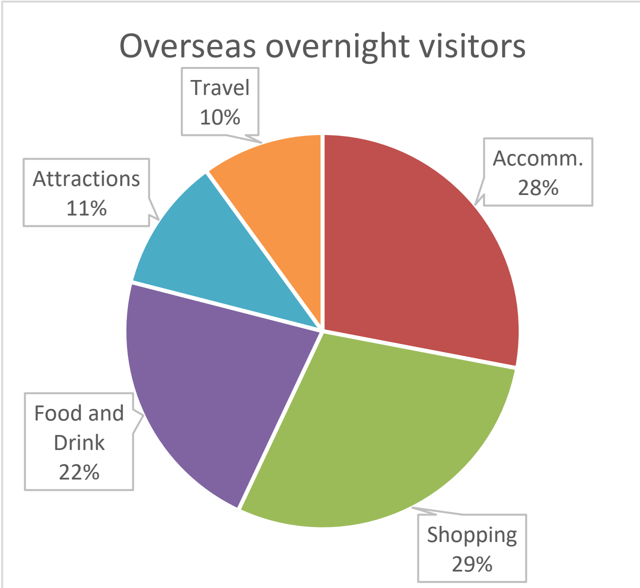
Expenditure Associated with Trips

Kent - 2022 Results

Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK visitors		£181,050,500	£76,809,100	£126,186,700	£60,350,500	£104,241,200	£548,638,000
Overseas visitors		£75,784,800	£78,491,400	£59,545,200	£29,772,600	£27,066,000	£270,660,000
Total Staying		£256,835,300	£155,300,500	£185,731,900	£90,123,100	£131,307,200	£819,298,000
Total Staying (%)		31%	19%	23%	11%	16%	100%
Total Day Visitors		£0	£880,653,000	£737,291,000	£225,283,000	£204,803,000	£2,048,030,000
Total Day Visitors (%)		0%	43%	36%	11%	10%	100%
Total	**2022**	**£256,835,300**	**£1,035,953,500**	**£923,022,900**	**£315,406,100**	**£336,110,200**	**£2,867,328,000**
%		**9%**	**36%**	**32%**	**11%**	**12%**	**100%**
Comparison	**2021**	**£168,617,100**	**£631,789,000**	**£706,993,100**	**£208,444,100**	**£302,870,700**	**£2,018,714,000**
Difference		**52%**	**64%**	**31%**	**51%**	**11%**	**42%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£4,013,000	£4,105,000	£92,000	£250,823,000	£259,033,000

Spend on second homes is assumed to be an average of £2,050 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,050 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 £2,050. 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 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 Visitors	Day Visitors	Total
Accommodation		£261,514,000	£19,355,000	£280,869,000
Retail		£153,636,000	£832,270,000	£985,906,000
Catering		£177,139,000	£716,139,000	£893,278,000
Attractions		£95,186,000	£251,616,000	£346,802,000
Transport		£79,484,000	£116,131,000	£195,615,000
Non-trip spend		£259,033,000	£0	£259,033,000
Total Direct	**2022**	**£1,025,992,000**	**£1,935,511,000**	**£2,961,503,000**
Comparison	**2021**	**£695,135,000**	**£1,373,809,000**	**£2,068,944,000**
Difference		**48%**	**41%**	**43%**

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 Visitors	Day Visitors	Total
Indirect spend		£159,107,000	£308,135,000	£467,242,000
Non trip spending		£38,329,000	£0	£38,329,000
Income induced		£117,207,000	£191,446,000	£308,653,000
Total	**2022**	**£314,643,000**	**£499,581,000**	**£814,224,000**
Comparison	**2021**	**£182,601,000**	**£328,480,000**	**£511,081,000**
Difference		**72%**	**52%**	**59%**

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 Visitors	Day Visitors	Total
Direct		£1,025,992,000	£1,935,511,000	£2,961,503,000
Indirect		£314,643,000	£499,581,000	£814,224,000
Total Value	**2022**	**£1,340,635,000**	**£2,435,092,000**	**£3,775,727,000**
Comparison	**2021**	**£877,736,000**	**£1,702,289,000**	**£2,580,025,000**
Difference		**53%**	**43%**	**46%**

Employment

Employment

Kent - 2022 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. A new Full Time Equivalent tourism job is created with every £54,000 increase in tourism revenue.

Direct employment

Full time equivalent (FTE)							
		Staying Visitors		Day Visitor		Total	
Accommodation		4,351	29%	229	1%	4,580	12%
Retailing		1,537	10%	9,365	39%	10,902	28%
Catering		2,793	18%	9,378	39%	12,171	31%
Entertainment		1,249	8%	2,882	12%	4,131	10%
Transport		658	4%	2,161	9%	2,819	7%
Non-trip spend		4,739	31%	0	0%	4,739	12%
Total FTE	**2022**	**15,327**		**24,015**		**39,342**	
Comparison	**2021**	**12,092**		**20,180**		**32,272**	
Difference		**27%**		**19%**		**22%**	

Estimated actual jobs							
		Staying Visitors		Day Visitor		Total	
Accommodation		6,435	29%	355	1%	6,790	12%
Retailing		2,309	11%	14,182	40%	16,491	28%
Catering		4,212	19%	13,473	38%	17,685	31%
Entertainment		1,784	8%	4,609	13%	6,393	11%
Transport		941	4%	2,836	8%	3,777	7%
Non-trip spend		6,300	29%	0	0%	6,300	11%
Total Actual	**2022**	**21,981**		**35,454**		**57,435**	
Comparison	**2021**	**17,411**		**29,799**		**47,210**	
Difference		**26%**		**19%**		**22%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitors	Day Visitors	Total
Indirect jobs		3,529	5,543	9,072
Induced jobs		2,170	3,545	5,715
Total FTE	**2022**	**5,699**	**9,088**	**14,787**
Comparison	**2021**	**3,586**	**6,480**	**10,066**
Difference		**59%**	**40%**	**47%**

Estimated actual jobs				
		Staying Visitors	Day Visitors	Total
Indirect jobs		4,145	6,326	10,471
Induced jobs		2,520	4,036	6,556
Total Actual	**2022**	**6,665**	**10,362**	**17,027**
Comparison	**2021**	**4,193**	**7,388**	**11,581**
Difference		**59%**	**40%**	**47%**

Total Tourism Jobs   Kent - 2022 Results

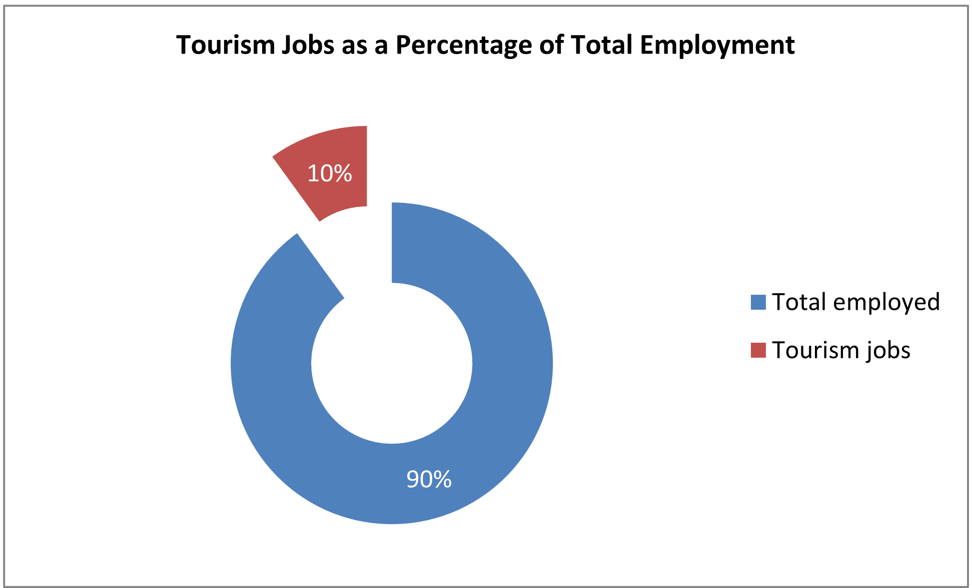
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitors		Day Visitor		Total	
Direct		15,327	73%	24,015	73%	39,342	73%
Indirect		3,529	17%	5,543	17%	9,072	17%
Induced		2,170	10%	3,545	10%	5,715	10%
Total FTE	**2022**	**21,026**		**33,103**		**54,129**	
Comparison	2021	15,678		26,660		42,338	
Difference		34%		24%		28%	

Estimated actual jobs							
		Staying Visitors		Day Visitor		Total	
Direct		21,981	77%	35,454	77%	57,435	77%
Indirect		4,145	14%	6,326	14%	10,471	14%
Induced		2,520	9%	4,036	9%	6,556	9%
Total Actual	**2022**	**28,646**		**45,816**		**74,462**	
Comparison	2021	21,604		37,187		58,791	
Difference		33%		23%		27%	

Tourism Jobs as a Percentage of Total Employment (*)

		Staying Visitors	Day visitors	Total
Total employed		752,400	752,400	752,400
Tourism jobs		28,646	45,816	74,462
Proportion all jobs		**4.0%**	**6.0%**	**10.0%**
Comparison	2021	21,604	37,187	58,791
Difference		33%	23%	27%



(*) Is it estimated that 3,686 actual jobs are supported by Bluewater, raising the total employment in that area to 9,451, or 14% of all employment in Dartford.

The key 2022 results of the Economic Impact Assessment are:

60.8 million trips were undertaken in the area
56.5 million day trips
4.3 million overnight visits

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

£2,962 million spent by tourists during their visit to the area
£247 million spent on average in the local economy each month.

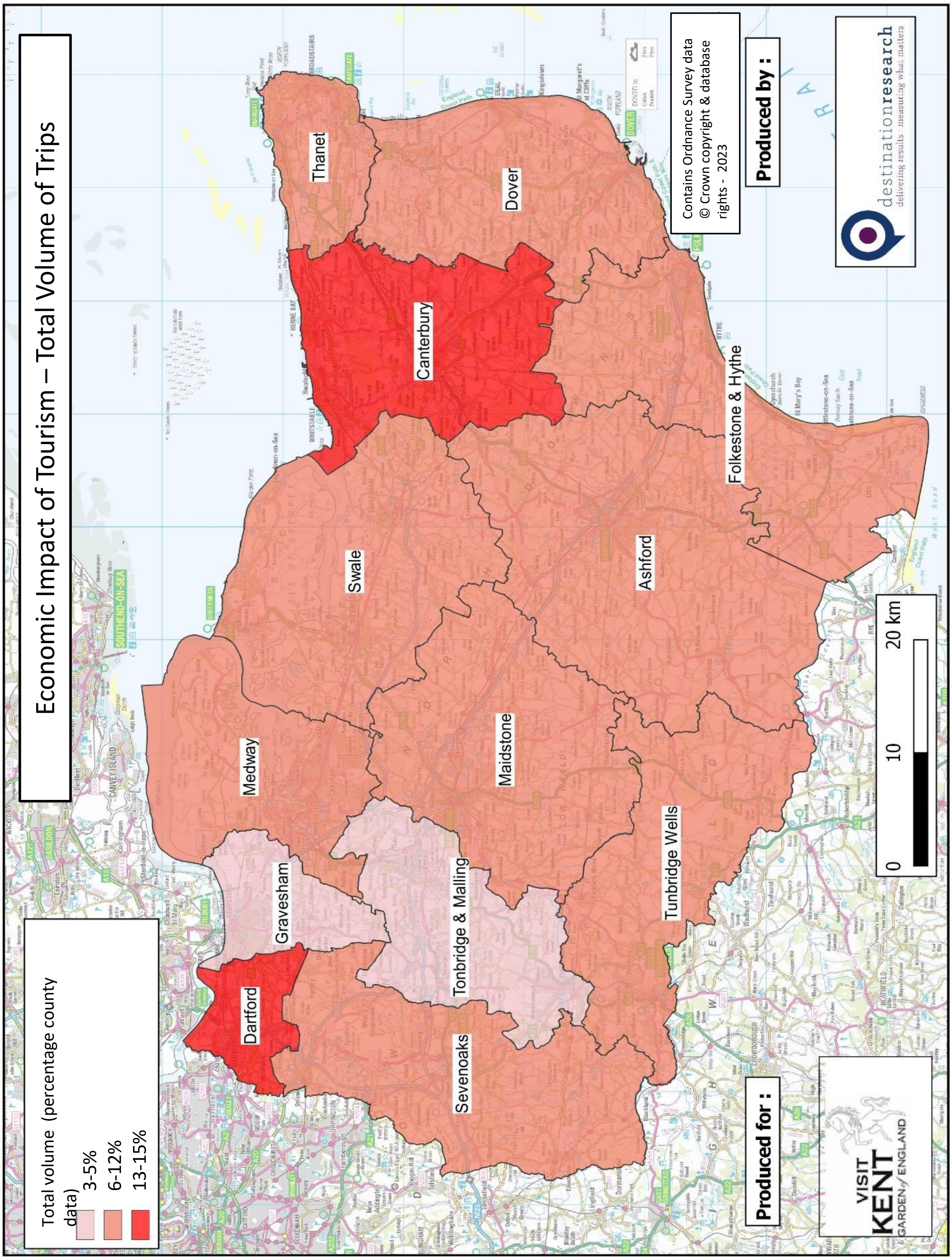
£819 million generated by overnight visits
£2,048 million generated from day trips.

£3,776 million spent in the local area as result of tourism, taking into account multiplier effects.

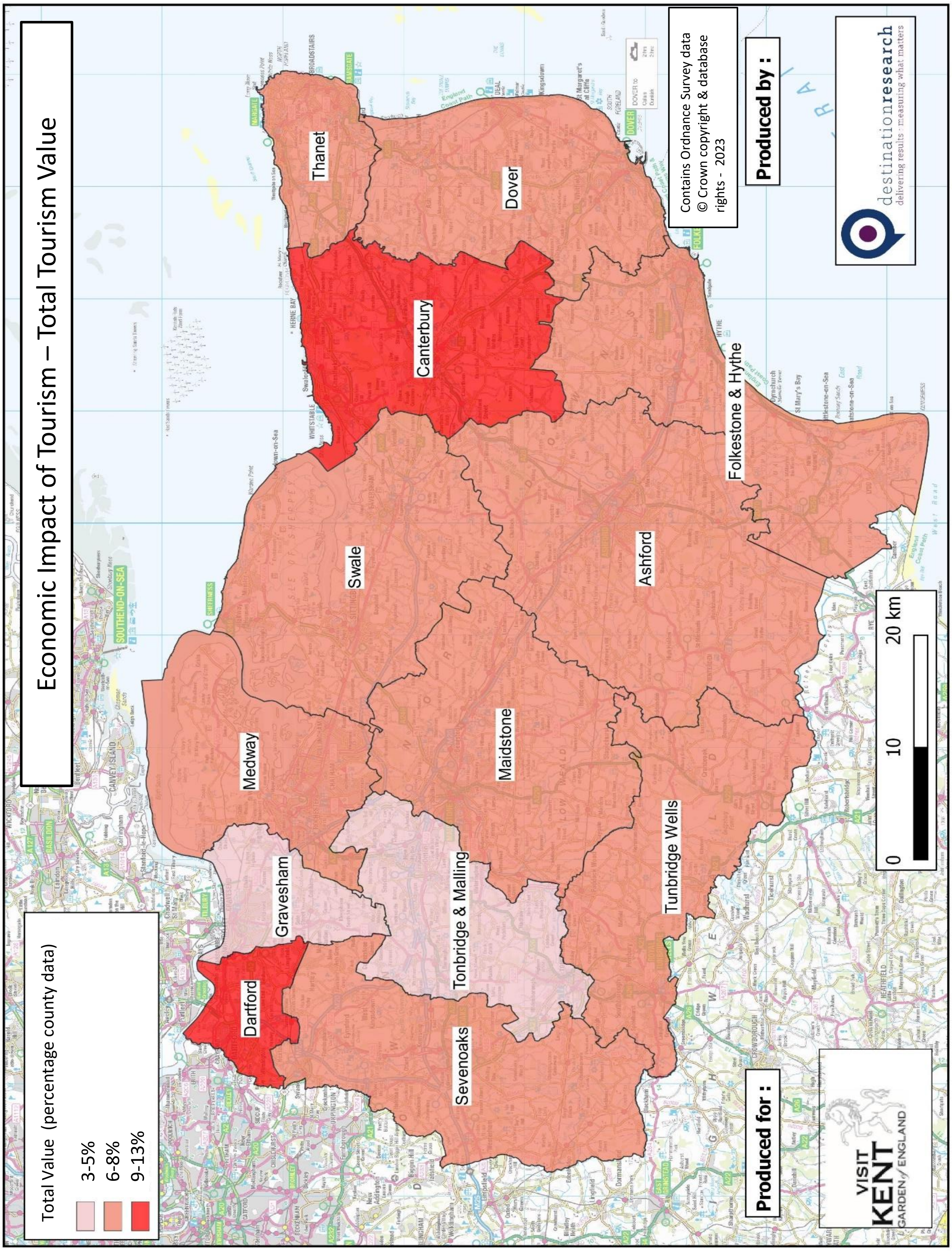
74,462 jobs supported, both for local residents and from those living nearby.
57,435 tourism jobs directly supported
17,027 non-tourism related jobs supported linked to multiplier spend from tourism.

Note: The figues have been rounded. For a full set of results, please refer to the main report.

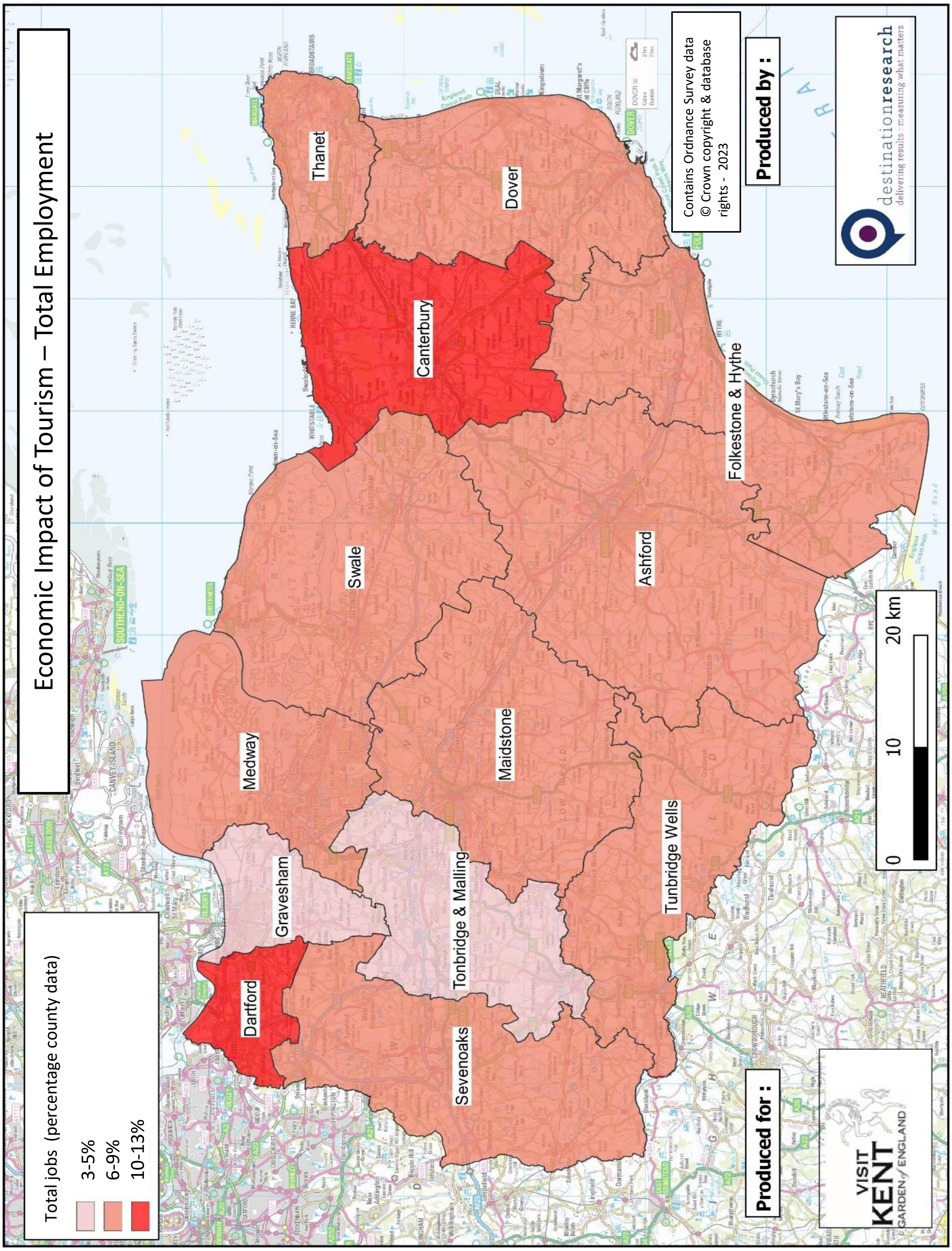
Thematic maps - Total Volume of Trips



Thematic maps - Total Tourism Value



Thematic maps - Total Tourism Employment



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;
- Latest estimates of resident population as based on the 2021 Census of Population;
- Selected data from the 2021 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 (GBDVS). A day visitor is defined as someone making a day trip to and from home for leisure purposes. The report excludes trips undertaken for business or study purposes. This report presents data on those who took trips of at least 3 hours duration on an irregular basis as defined by the GBDVS. These are identified as tourism day trips by the Department for Digital, Culture, Media and Sport

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 county.

The GBTS, IPS and Day Visits to Great Britain survey provides 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.

Local level data for Kent EIA Reports 2022

The Cambridge Model allows for the use of local visitor related data. Local data from visitor surveys and other sources is not always sufficiently detailed or available regularly enough to make the results consistent. We have also used data from the Visit Kent's Business Barometer and headline STR and country and district AirDNA figures (monthly/yearly occupancy and supply and demand).

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