Interreg France (Channel Manche) England
EXPERIENCE
European Regional Development Fund

EUROPEAN UNION

Commissioned by:

Swale Borough Council

Economic Impact of Tourism

Swale - 2021 Results

November 2022

Visit Kent Garden of England

destinationresearch
delivering results : measuring what matters

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Introduction

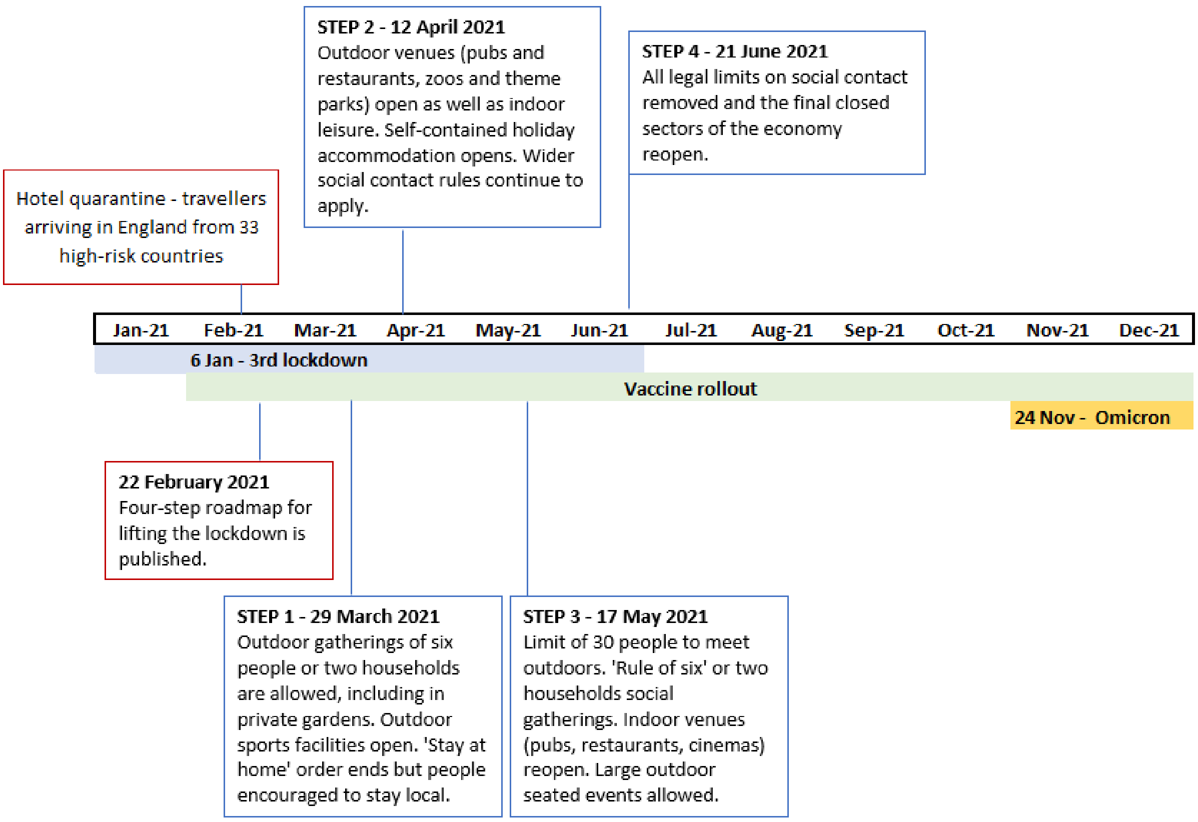
This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2021 and provides comparative data against the previously published data for 2020 as well as providing headline comparisons against 2019 in order to monitor the ongoing impact of the pandemic.

Part of the Interreg Channel EXPERIENCE project, Destination Research was commissioned by Visit Kent, in partnership with Swale Borough Council, to produce 2021 results based on the latest data from national tourism surveys and regionally/locally based data. The results are derived using the Cambridge Economic Impact Model.

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.

Summary of national lockdown laws during 2021

Our analysis assumes an initial lockdown starting in January, followed by a four-step roadmap for a gradual lifting of movement and travel restrictions.



Cambridge Model 2021 results – Key methodology changes

The Cambridge Model examines the volume and value of tourism and the impact of that expenditure on the local economy. The model utilises information from national tourism surveys among other sources of information. 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 Visits Survey using information on visits lasting more than 3 hours and taken on an irregular basis.

The above reports are not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we usually apply a 3-year rolling average to this data to highlight longer-term trends, whilst helping smooth out short-term market fluctuations and reducing the impact of any methodological changes affecting the survey. For example, published results relating to 2019 were, in fact, an average of 2017, 2018 and 2019 results.

The ongoing Covid-19 pandemic has caused global disruption to the visitor economy with activity re-starting at a slow pace. There is a consensus that tourism recovery will be segmented and gradual. In order to reflect the impact of the pandemic, the 2021 results incorporate the following methodological changes:

- Results for the three key surveys (GBTS, IPS and GBDVS) were suspended in March 2020 because of the coronavirus (Covid-19) pandemic.
- Fieldwork for the GBTS and GBDVS resumed in April 2021 and national-level 2021 data (April – December) will be published during the last quarter of 2022.
- During 2021, the IPS survey restarted at the majority of ports but did not operate at Dover until Q3 and there were no interviews at the Eurotunnel through the entirety of 2021 due to COVID-19 restrictions. Therefore, the published data does not represent the total inbound market for 2021 and is not directly comparable with historical UK total data.
- Therefore, the full 2021 results presented in this report are based on a range of administrative sources, consumer travel insights published by national agencies and modelling work, using the published 2019 Cambridge Model data as a starting point.
- Domestic tourism estimates produced by VisitBritain for each of the four journey purposes for domestic overnight tourism (holidays, business, visiting friends and relatives and miscellaneous journeys), 17 categories of spending for leisure day trips.
- Whenever available, we have included locally sourced data supplied by destinations in our calculations, including (but not limited to) local business performance (e.g. accommodation occupancy), car parking data, annual footfall and visits to visitor attractions.

SEASONALITY: The figures assume a step change in mid-May as restrictions eased, followed by a continued recovery in the summer and autumn. Towards the end of the year there was a dip from late November, intensifying in December, due to the Omicron variant.

TRIPS AND WEIGHTING FACTORS: Our model uses a set of weighting factors to reflect the fact that different journey purposes and trip types recovered at different rates, and there were different patterns of recovery by type of destination. Holidays and trips to friends and family performed above 2019 and 2020 levels whereas business -related visits continued to fall.

Furthermore, urban and coastal resort areas attracted proportionately higher levels of expenditure from day trippers due to the shopping opportunities, whereas countryside, villages and rural coastal areas experienced a proportionately stronger overnight visitor market, due to the availability of self-catering accommodation and the wider offer of socially distanced holidays.

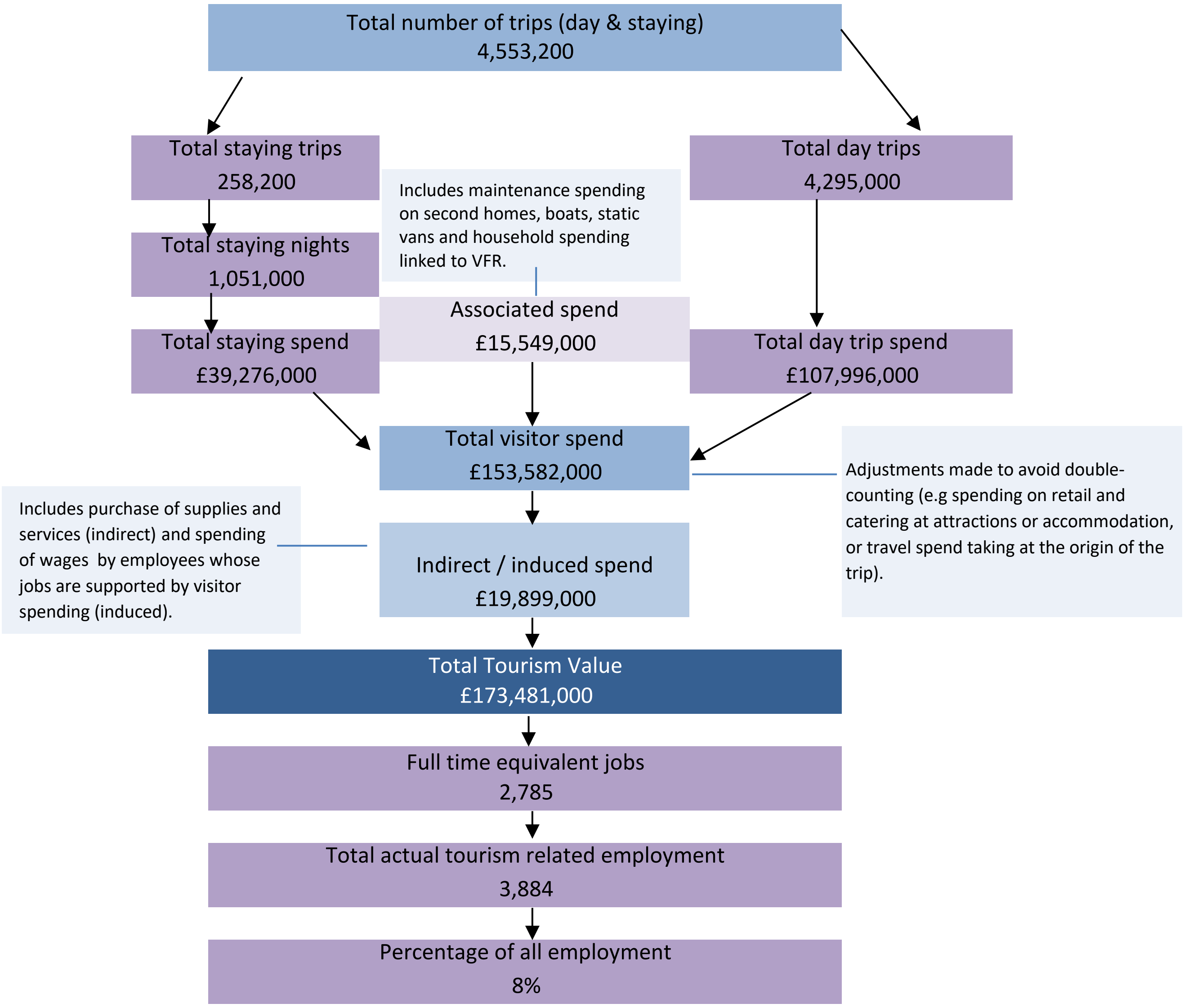
EMPLOYMENT:
The Government's Job Retention Scheme, known as furlough was first launched in April 2020 and lasted until 30 September 2021. Initially, employees continued to receive 80% of current salary for hours not worked, capped at £2,500 per month. From 1 July 2021, the Government paid 70% of wages up to a maximum cap of £2,187.50 for the hours the employee was on furlough. Employers had to top up employees' wages so that they received 80% of their wages (up to £2,500) for the hours they were on furlough. From 1 August 2021, the Government paid 60% of wages up to a maximum cap of £1,875 for the hours the employee was on furlough.

As coronavirus restrictions came to an end, industries in the UK experienced the effects of the pandemic in different ways. Employment fell in the accommodation and food sectors. Data from the Office for National Statistics (ONS) shows that from October to December 2021, employment in the accommodation and food sector was still 11% below pre-pandemic levels.

2021 National forecast
As was the case with the 2020 results, the model will make use of the latest forecast from VisitBritain, relating to 2021. This assumes an estimated £16.0bn in domestic overnight tourism spending (64% growth on 2020 and 65% of the 2019 level) and £41.0bn in leisure day trip spending (69% growth on 2020 and 61% of the 2019 level).

Inbound tourism for the full year 2021 is estimated at 6.4 million visits, 42% down on 2020 and 16% of the 2019 level (or 84% down on 2019). Expenditure by inbound visitors reached £5.6bn, 10% down on 2020 and 20% of the 2019 level (or 80% down on 2019).

Economic Impact of Tourism – Headline Figures   Swale - 2021 Results



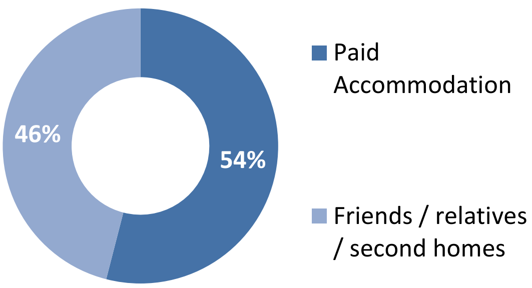
Economic Impact of Tourism – year on year comparisons

				Year-on-year comparison	Pre-pandemic levels
Day Trips	**2021**	**2020**	**2019**	**2021 v 2020**	**2021 v 2019**
Day trips volume	4,295,000	3,085,000	4,994,000	39%	-14%
Day trips value	£107,996,000	£61,969,000	£156,793,000	74%	-31%
Overnight trips					
Number of trips	258,200	180,000	395,000	43%	-35%
Number of nights	1,051,000	701,000	1,526,000	50%	-31%
Trip value	£39,276,000	£24,905,000	£55,860,000	58%	-30%
Total value	£173,481,000	£102,310,000	£262,675,000	**70%**	**-34%**
Actual jobs	3,884	3,264	5,307	**19%**	**-27%**

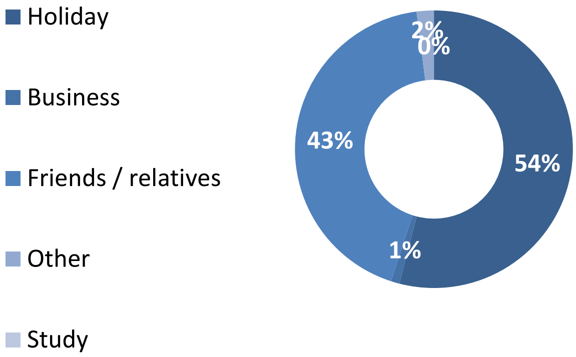
	2021	**2020**	**2019**	**2021 v 2020**	**2021 v 2019**
Average length stay (nights x trip)	4.07	3.89	3.86	4.5%	5.4%
Spend x overnight trip	£152.11	£138.36	£141.35	9.9%	7.6%
Spend x night	£37.37	£35.53	£36.61	5.2%	2.1%
Spend x day trip	£25.14	£20.09	£31.40	25.2%	-19.9%

Economic Impact of Tourism – Headline Figures   Swale - 2021 Results

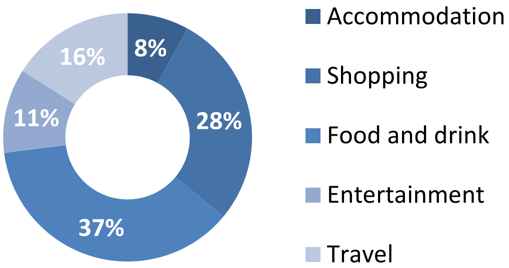
Trips by type of accommodation



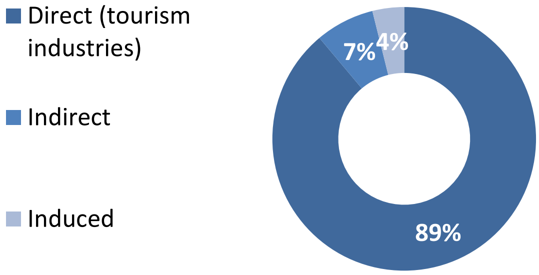
Trips by Purpose



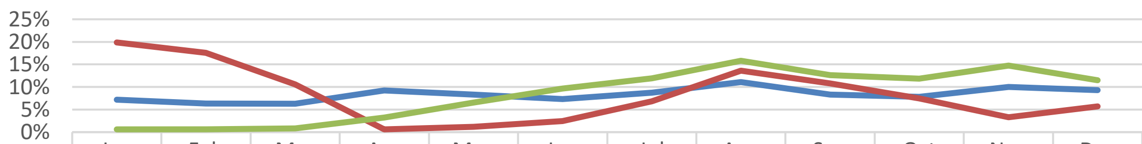
Breakdown of Expenditure



Type of Employment



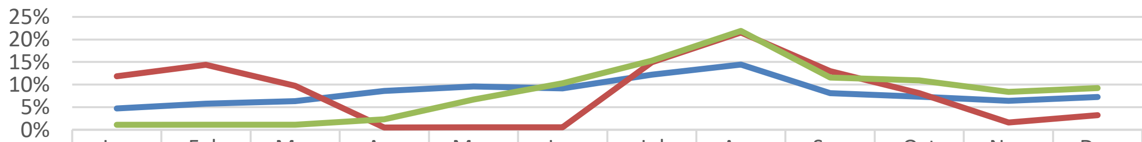
Seasonality - Day trip expenditure (England)



	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%
2020	20%	18%	11%	1%	1%	2%	7%	14%	11%	7%	3%	6%
2021	1%	1%	1%	3%	7%	10%	12%	16%	13%	12%	15%	12%

2019 2020 2021

Seasonality - Overnight expenditure (England)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	5%	6%	6%	9%	10%	9%	12%	14%	8%	7%	6%	7%
2020	12%	14%	10%	1%	1%	1%	15%	22%	13%	8%	2%	3%
2021	1%	1%	1%	2%	7%	10%	15%	22%	12%	11%	8%	9%

2019 2020 2021

Source: VisitBritain

Volume of Tourism

Staying visits in the county context **Swale - 2021 Results**

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

Staying trips in the county context	Domestic trips ('000)	Overseas trips ('000)
Ashford	236	27.5
Canterbury	368	48.0
Dartford	111	11.0
Dover	257	23.1
Folkestone & Hythe	282	34.0
Gravesham	104	9.0
Maidstone	229	27.9
Medway	286	31.7
Sevenoaks	137	15.2
Swale	239	19.2
Thanet	291	39.2
Tonbridge and Malling	154	14.9
Tunbridge Wells	196	21.7
Kent	**2,890**	**322.4**

Staying nights in the county context	Domestic nights ('000)	Overseas nights ('000)
Ashford	675	118.8
Canterbury	1,136	259.0
Dartford	351	44.8
Dover	778	102.0
Folkestone & Hythe	875	136.0
Gravesham	330	48.0
Maidstone	736	164.0
Medway	996	174.0
Sevenoaks	430	76.0
Swale	962	89.0
Thanet	924	260.0
Tonbridge and Malling	482	69.0
Tunbridge Wells	566	109.0
Kent	**9,241**	**1,649.6**

Expenditure in the county context	Domestic spend (millions)	Overseas spend (millions)
Ashford	£42.1	£5.4
Canterbury	£59.5	£13.6
Dartford	£16.9	£2.3
Dover	£48.9	£6.0
Folkestone & Hythe	£53.6	£8.3
Gravesham	£14.8	£2.1
Maidstone	£36.7	£8.1
Medway	£40.8	£8.3
Sevenoaks	£22.0	£4.0
Swale	£35.1	£4.1
Thanet	£51.9	£18.4
Tonbridge and Malling	£22.5	£4.4
Tunbridge Wells	£32.3	£6.0
Kent	**£477.1**	**£90.1**

Staying Visitors - Accommodation Type   Swale - 2021 Results

Trips by Accommodation

	UK		Overseas		Total	
Serviced	27,000	11%	3,100	16%	30,100	12%
Self catering	9,000	3%	300	1%	9,300	3%
Camping	21,000	9%	1,300	7%	22,300	9%
Static caravans	65,000	27%	5,500	29%	70,500	27%
Group/campus	0	0%	0	0%	0	0%
Paying guest	0	0%	0	0%	0	0%
Second homes	4,000	2%	400	2%	4,400	2%
Boat moorings	4,000	2%	0	0%	4,000	1%
Other	4,000	2%	200	1%	4,200	2%
Friends & relatives	105,000	44%	8,400	44%	113,400	44%
Total 2021	**239,000**		**19,200**		**258,200**	
Comparison 2020	**164,000**		**16,000**		**180,000**	
Difference	**46%**		**20%**		**43%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	69,000	7%	7,000	8%	76,000	7%
Self catering	18,000	2%	4,000	5%	22,000	2%
Camping	59,000	6%	4,000	5%	63,000	6%
Static caravans	397,000	41%	11,000	12%	408,000	39%
Group/campus	1,000	0%	1,000	1%	2,000	1%
Paying guest	0	0%	0	0%	0	0%
Second homes	15,000	2%	3,000	3%	18,000	2%
Boat moorings	30,000	3%	0	0%	30,000	3%
Other	15,000	2%	1,000	1%	16,000	1%
Friends & relatives	358,000	37%	58,000	65%	416,000	39%
Total 2021	**962,000**		**89,000**		**1,051,000**	
Comparison 2020	**604,000**		**97,000**		**701,000**	
Difference	**59%**		**-8%**		**50%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£7,702,000	22%	£727,000	18%	£8,429,000	21%
Self catering	£1,257,000	4%	£187,000	4%	£1,444,000	4%
Camping	£1,545,000	4%	£179,000	4%	£1,724,000	4%
Static caravans	£13,015,000	37%	£569,000	14%	£13,584,000	35%
Group/campus	£25,000	0%	£38,000	1%	£63,000	0%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£614,000	2%	£105,000	3%	£719,000	2%
Boat moorings	£798,000	2%	£0	0%	£798,000	2%
Other	£1,408,000	4%	£95,000	2%	£1,503,000	4%
Friends & relatives	£8,770,000	25%	£2,242,000	54%	£11,012,000	28%
Total 2021	**£35,134,000**		**£4,142,000**		**£39,276,000**	
Comparison 2020	**£20,830,000**		**£4,075,000**		**£24,905,000**	
Difference	**69%**		**2%**		**58%**	

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 | Swale - 2021 Results

Trips by Purpose

		UK		Overseas		Total	
Holiday		134,000	56%	5,400	28%	139,400	54%
Business		2,000	1%	0	0%	2,000	1%
Friends & relatives		98,000	41%	12,800	67%	110,800	43%
Other		5,000	2%	1,000	5%	6,000	2%
Study		0	0%	0	0%	0	0%
Total	**2021**	**239,000**		**19,200**		**258,200**	
Comparison	**2020**	**164,000**		**16,000**		**180,000**	
Difference		**46%**		**20%**		**43%**	

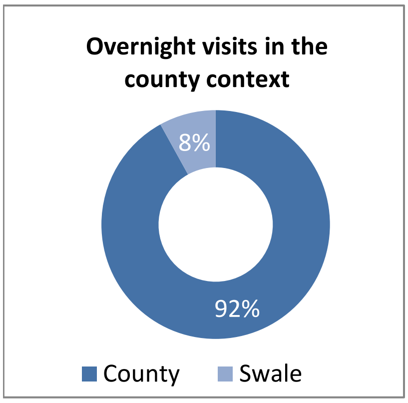
Nights by Purpose

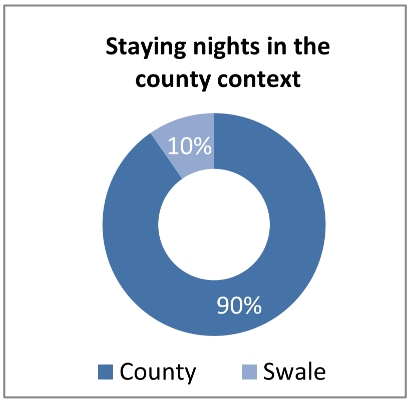
		UK		Overseas		Total	
Holiday		625,300	65%	16,900	19%	642,200	61%
Business		5,800	1%	900	1%	6,700	0%
Friends & relatives		311,700	32%	62,300	70%	374,000	36%
Other		19,200	2%	8,900	10%	28,100	3%
Study		0	0%	0	0%	0	0%
Total	**2021**	**962,000**		**89,000**		**1,051,000**	
Comparison	**2020**	**604,000**		**97,000**		**701,000**	
Difference		**59%**		**-8%**		**50%**	

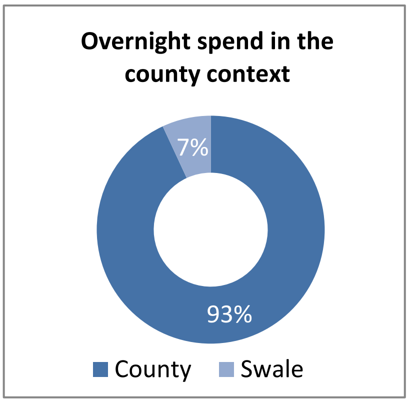
Spend by Purpose

		UK		Overseas		Total	
Holiday		£28,458,500	81%	£994,100	24%	£29,452,600	75%
Business		£702,700	2%	£41,400	1%	£744,100	2%
Friends & relatives		£4,216,100	12%	£2,485,200	60%	£6,701,300	17%
Other		£1,756,700	5%	£621,300	15%	£2,378,000	6%
Study		£0	0%	£0	0%	£0	0%
Total	**2021**	**£35,134,000**		**£4,142,000**		**£39,276,000**	
Comparison	**2020**	**£20,830,000**		**£4,075,000**		**£24,905,000**	
Difference		**69%**		**2%**		**58%**	

Proportion of staying visits in the county context







Day Visitors

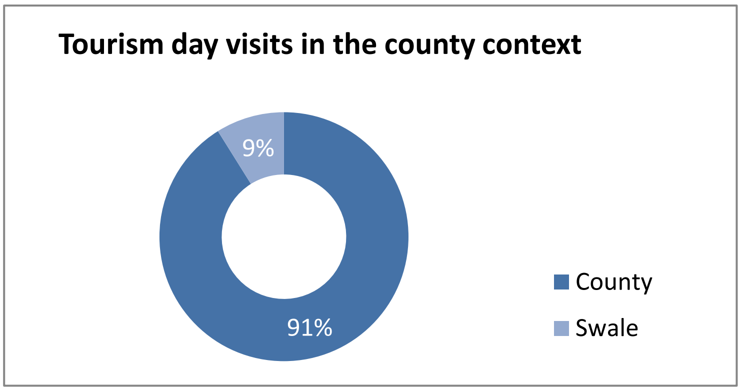
Swale - 2021 Results

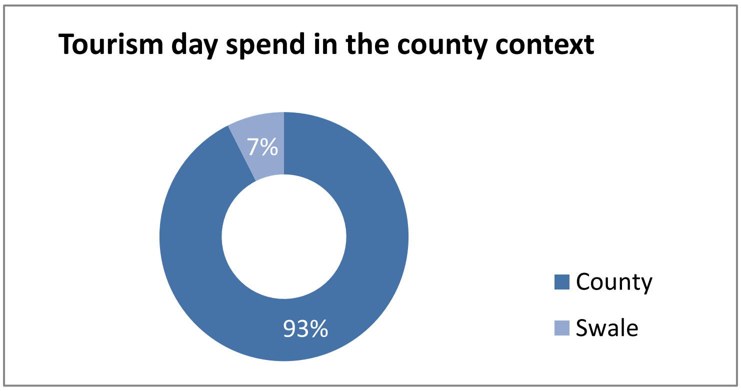
Total Volume and Value of Day Trips

		Trips	Spend
Total	**2021**	**4,295,000**	**£107,996,000**
Comparison	2020	3,085,000	£61,969,000
Difference		39%	74%

Day Visitors in the county context

District	Day Visits (millions)	Day visits Spend (millions)
Ashford	3.1	£99.5
Canterbury	6.8	£184.8
Dartford	6.2	£211.4
Dover	3.7	£99.6
Folkestone & Hythe	4.0	£107.3
Gravesham	1.4	£37.4
Maidstone	3.0	£100.8
Medway	3.2	£102.7
Sevenoaks	3.2	£109.2
Swale	4.3	£108.0
Thanet	3.6	£98.9
Tonbridge and Malling	2.4	£77.5
Tunbridge Wells	3.3	£114.7
Kent	**48.3**	**£1,451.5**





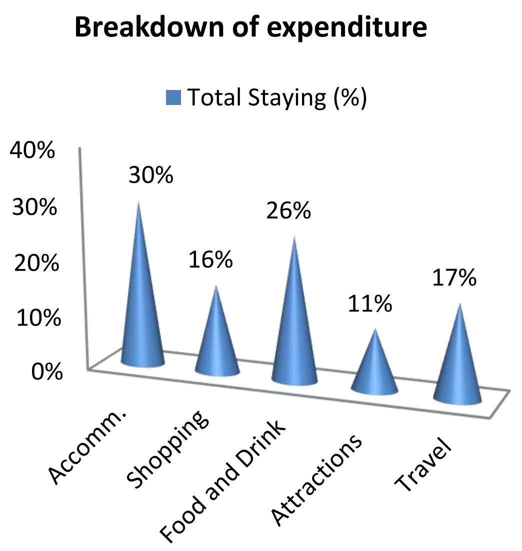
Value of Tourism

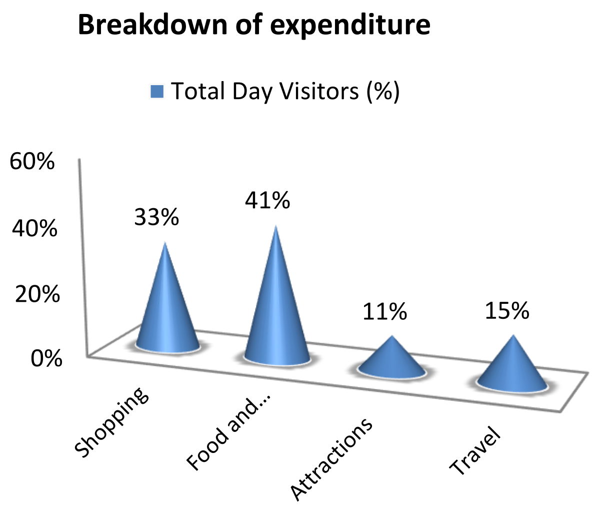
Expenditure Associated with Trips

Swale - 2021 Results

Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£10,891,500	£4,918,800	£9,134,800	£3,864,700	£6,324,200	£35,134,000
Overseas tourists	£952,700	£1,284,000	£994,100	£497,000	£414,200	£4,142,000
Total Staying	£11,844,200	£6,202,800	£10,128,900	£4,361,700	£6,738,400	£39,276,000
Total Staying (%)	30%	16%	26%	11%	17%	100%
Total Day Visitors	£0	£35,638,700	£44,278,400	£11,879,700	£16,199,200	£107,996,000
Total Day Visitors (%)	0%	33%	41%	11%	15%	100%
Total 2021	**£11,844,200**	**£41,841,500**	**£54,407,300**	**£16,241,400**	**£22,937,600**	**£147,272,000**
%	**8%**	**28%**	**37%**	**11%**	**16%**	**100%**
Comparison 2020	£7,357,000	£16,098,000	£32,734,000	£13,922,000	£16,763,000	£86,874,000
Difference	61%	160%	66%	17%	37%	70%





Other Expenditure Associated with Tourism Activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£250,000	£306,000	£37,000	£14,956,000	£15,549,000

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

Swale - 2021 Results

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	£11,983,000	£885,000	£12,868,000
Retail	£5,979,000	£34,904,000	£40,883,000
Catering	£9,794,000	£42,935,000	£52,729,000
Attractions	£4,631,000	£13,066,000	£17,697,000
Transport	£4,133,000	£9,723,000	£13,856,000
Non-trip spend	£15,549,000	£0	£15,549,000
Total Direct 2021	**£52,069,000**	**£101,513,000**	**£153,582,000**
Comparison 2020	**£32,823,000**	**£57,011,000**	**£89,834,000**
Difference	**59%**	**78%**	**71%**

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	£2,798,000	£8,327,000	£11,125,000
Non trip spending	£2,332,000	£0	£2,332,000
Income induced	£2,458,000	£3,984,000	£6,442,000
Total 2021	**£7,588,000**	**£12,311,000**	**£19,899,000**
Comparison 2020	**£5,062,000**	**£7,414,000**	**£12,476,000**
Difference	**50%**	**66%**	**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 Visitor	Day Visitors	Total
Direct	£52,069,000	£101,513,000	£153,582,000
Indirect	£7,588,000	£12,311,000	£19,899,000
Total Value 2021	**£59,657,000**	**£113,824,000**	**£173,481,000**
Comparison 2020	**£37,885,000**	**£64,425,000**	**£102,310,000**
Difference	**57%**	**77%**	**70%**

Employment

Employment   Swale - 2021 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 £48,600 increase in tourism revenue.

Direct Employment

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Accommodation		229	25%	17	1%	246	10%
Retailing		72	8%	423	28%	495	21%
Catering		178	20%	779	52%	957	40%
Entertainment		63	7%	177	12%	240	10%
Transport		44	5%	103	7%	147	6%
Non-trip spend		320	35%	0	0%	320	13%
Total FTE	**2021**	**906**		**1,499**		**2,405**	
Comparison	**2020**	**787**		**1,276**		**2,063**	
Difference		**15%**		**18%**		**17%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Accommodation		339	27%	25	1%	364	10%
Retailing		109	9%	633	28%	742	21%
Catering		266	22%	1,168	53%	1,434	42%
Entertainment		89	7%	250	11%	339	10%
Transport		62	5%	146	7%	208	6%
Non-trip spend		365	30%	0	0%	365	11%
Total Actual	**2021**	**1,230**		**2,222**		**3,452**	
Comparison	**2020**	**1,085**		**1,881**		**2,966**	
Difference		**13%**		**18%**		**16%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitor	Day Visitors	Total
Indirect jobs		106	141	247
Induced jobs		51	82	133
Total FTE	**2021**	**157**	**223**	**379**
Comparison	**2020**	**118**	**144**	**262**
Difference		**33%**	**55%**	**45%**

Estimated actual jobs				
		Staying Visitor	Day Visitors	Total
Indirect jobs		120	161	281
Induced jobs		58	93	151
Total Actual	**2021**	**178**	**254**	**432**
Comparison	**2020**	**134**	**164**	**299**
Difference		**33%**	**55%**	**44%**

Total Tourism Jobs

Swale - 2021 Results

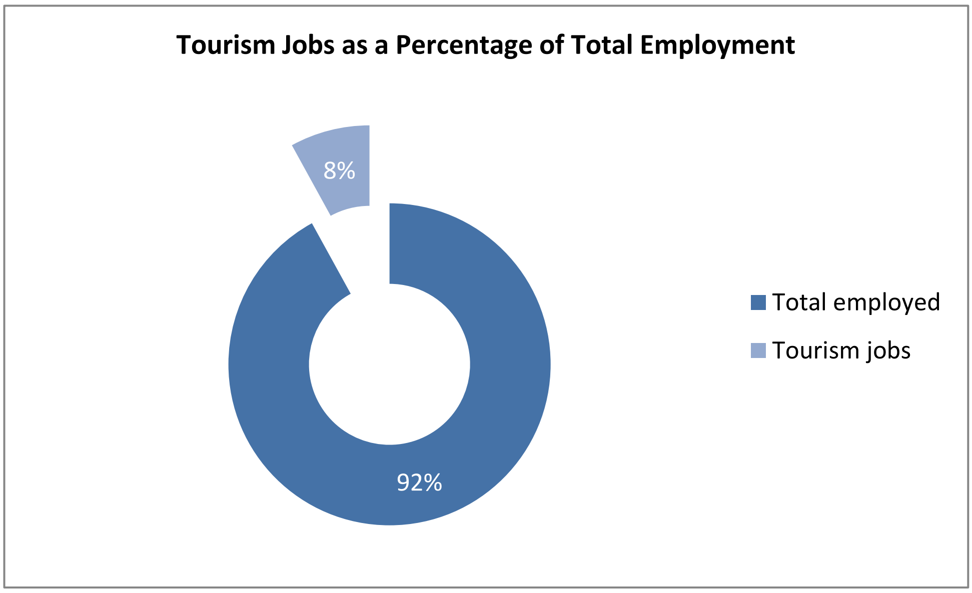
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Direct		906	85%	1,499	87%	2,405	86%
Indirect		106	10%	141	8%	247	9%
Induced		51	5%	82	5%	133	5%
Total FTE	**2021**	**1,063**		**1,722**		**2,785**	
Comparison	**2020**	**904**		**1,420**		**2,324**	
Difference		**18%**		**21%**		**20%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Direct		1,230	87%	2,222	90%	3,452	89%
Indirect		120	9%	161	6%	281	7%
Induced		58	4%	93	4%	151	4%
Total Actual	**2021**	**1,408**		**2,476**		**3,884**	
Comparison	**2020**	**1,219**		**2,045**		**3,264**	
Difference		**16%**		**21%**		**19%**	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day Visitors	Total
Total employed		46,161	46,161	46,161
Tourism jobs		1,408	2,476	3,884
Proportion all jobs		**3%**	**5%**	**8%**
Comparison	**2020**	**1,219**	**2,045**	**3,264**
Difference		**16%**	**21%**	**19%**



The key 2021 results of the Economic Impact Assessment are:

4.6 million trips were undertaken in the area
4.3 million day trips
0.3 million overnight visits

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

£154 million spent by tourists during their visit to the area
£13 million spent on average in the local economy each month.

£39 million generated by overnight visits
£108 million generated from day trips.

£173 million spent in the local area as result of tourism, taking into account multiplier effects.

3,884 jobs supported, both for local residents from those living nearby.
3,452 tourism jobs directly supported
432 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 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 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 (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 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 2021

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 rely on partners to collect additional locally sourced data to feed into the model. We have also used data from the NCTA Business Survey, Visit Kent's accommodation audit and, the Visit Kent's Business Barometer and headline STR figures (monthly/yearly occupancy and supply and demand).

KENT

- Kent Accommodation Study (2020)
- Airdna data – Kent level
- Visit Kent Perception Research
- Annual Visit Kent Business Barometer, 2019 and 2020
- 2021 Visit Kent Barometer footfall
- Port of Dover, Eurotunnel and Eurostar performance

Ashford

- Footfall Data for Park Mall Shopping Centre and Elwick Place Shopping Centre
- Ashford town centre footfall
- Car parking data for both Ashford and Tenterden
- Hampton by Hilton Hotel opened in Sept 2021 in Ashford Town Centre (140-bedroom hotel).

Canterbury

- Canterbury BID - Monthly footfall rates (year-on-year)
- Car Parking Figures (year-on-year)
- City Centre Performance reports
- Hampton by Hilton Hotel (129 beds)

Dartford

- Landsec Annual Report 2021,
- Dartford & Ebbsfleet Retail and Leisure Study, 2021

Dover

- Spectator admissions at the 149th Open
- Opening of the Travelodge in Sandwich (75 bedrooms)
- Cruise activity
- Footfall counters in Dover, Deal and Sandwich
- National Trust footfall counters
- Car parking figures 2020/2021

Gravesham

- Gravesend Town Centre Annual Footfall
- Gravesend Town Centre Council Car Parks data

Maidstone

- Maidstone Town Centre footfall 2019-2021
- Local Event Data Maidstone 2021

Sevenoaks

- Pedestrians from gates into Knole Park

Swale

- Footfall count Parking Spaces Count (Faversham, Sheerness, Sittingbourne, Leysdown Beach, Minster Beach and Sheerness Beach).
- Parking data (transactions and income) - Faversham, Sheppey, Sittingbourne
- Christmas events footfall

Thanet

- Business Barometer Survey for Tourism and Hospitality Industry (Coastal / COVID-19) - Winter 2021 wave, March 2021 wave, June 2021 wave and Autumn 2021 wave.
- Rail passenger numbers (Ramsgate, Broadstairs and Margate stations)
- Port of Ramsgate – number of visiting vessels & number of visitor nights

Tunbridge Wells

- 2021 visitor numbers for Cranbrook Museum, Spa Valley Railway and Spa Hotel (Hotel, events, restaurant and Spa).

Commissioned by Visit Kent, in partnership with Swale Borough Council, as part of the Interreg Channel Experience Project and co-financed by the European Regional Development Fund.

Produced by:

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

45 Colchester Road
Manningtree
CO11 2BA