



Commissioned by:



Economic Impact of Tourism

Tunbridge Wells - 2021

November 2022



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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 Tunbridge Wells 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.

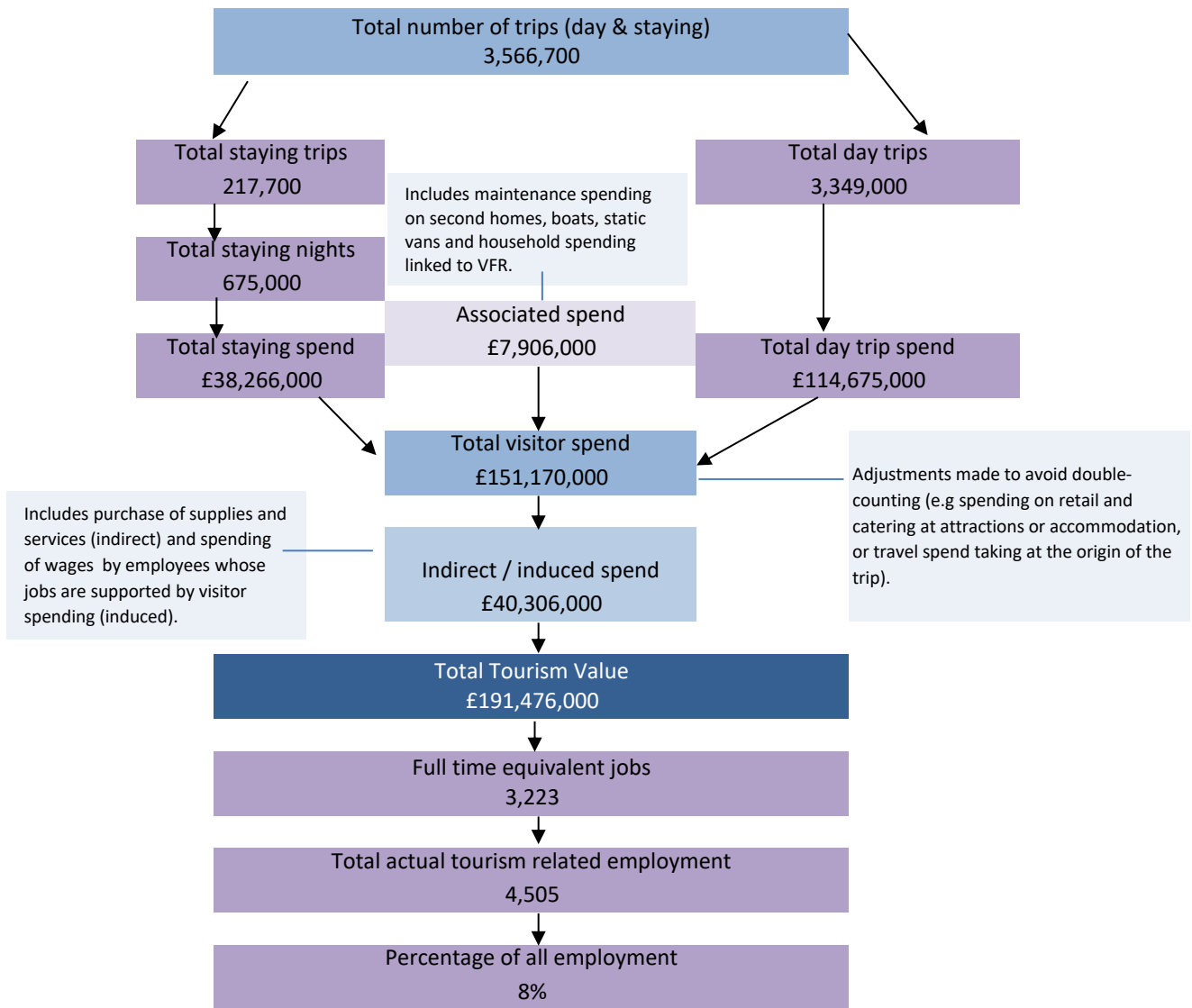
#### **2021 National forecast**

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).

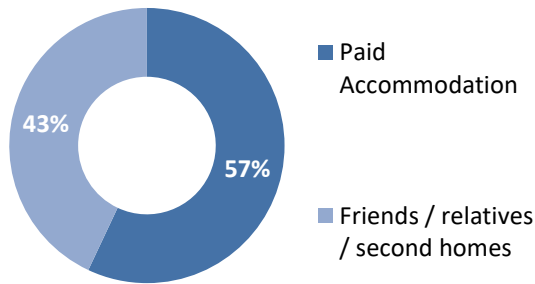
## Economic Impact of Tourism – Headline Figures

## Tunbridge Wells - 2021

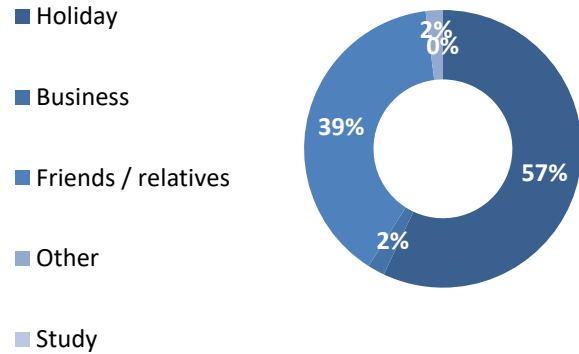


Economic Impact of Tourism – year on year comparisons				Year-on-year comparison	Pre-pandemic levels
	2021	2020	2019	2021 v 2020	2021 v 2019
<b>Day Trips</b>					
Day trips volume	3,349,000	2,325,000	4,492,000	44%	-25%
Day trips value	£114,675,000	£77,129,000	£174,022,000	49%	-34%
<b>Overnight trips</b>					
Number of trips	217,700	144,600	312,000	51%	-30%
Number of nights	675,000	440,000	1,152,000	53%	-41%
Trip value	£38,266,000	£22,842,000	£59,693,000	68%	-36%
<b>Total value</b>	<b>£191,476,000</b>	<b>£130,171,000</b>	<b>£295,626,000</b>	<b>47%</b>	<b>-35%</b>
<b>Actual jobs</b>	<b>4,505</b>	<b>3,652</b>	<b>5,568</b>	<b>23%</b>	<b>-19%</b>
	<b>2021</b>	<b>2020</b>	<b>2019</b>	<b>2021 v 2020</b>	<b>2021 v 2019</b>
Average length stay (nights x trip)	3.10	3.04	3.69	1.9%	-16.0%
Spend x overnight trip	£175.77	£157.97	£191.32	11.3%	-8.1%
Spend x night	£56.69	£51.91	£51.82	9.2%	9.4%
Spend x day trip	£34.24	£33.17	£38.74	3.2%	-11.6%

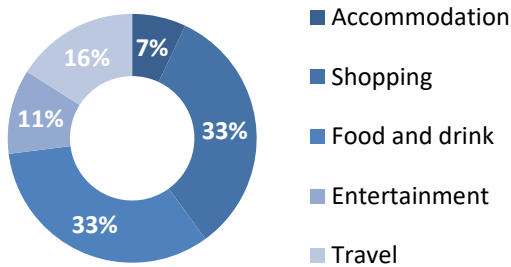
**Trips by type of accommodation**



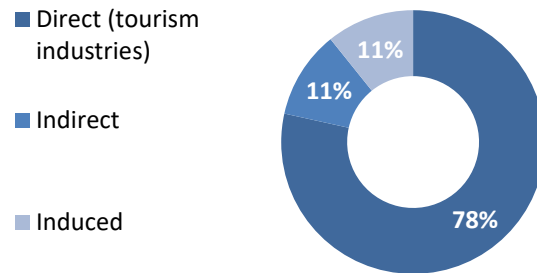
**Trips by Purpose**



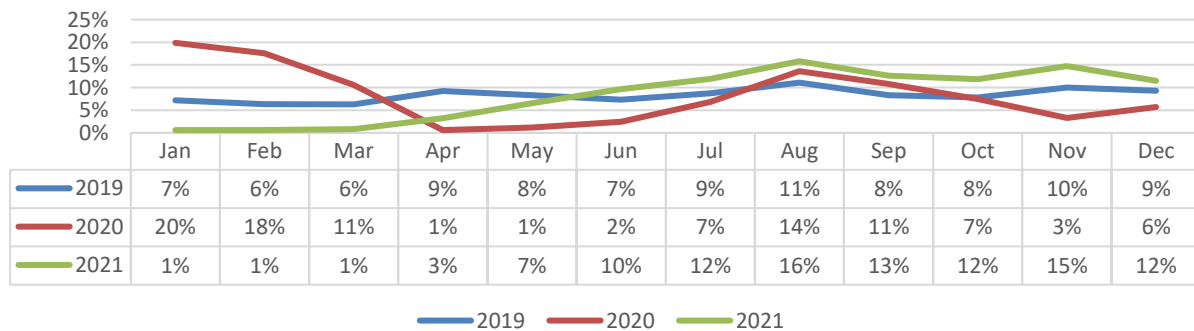
**Breakdown of Expenditure**



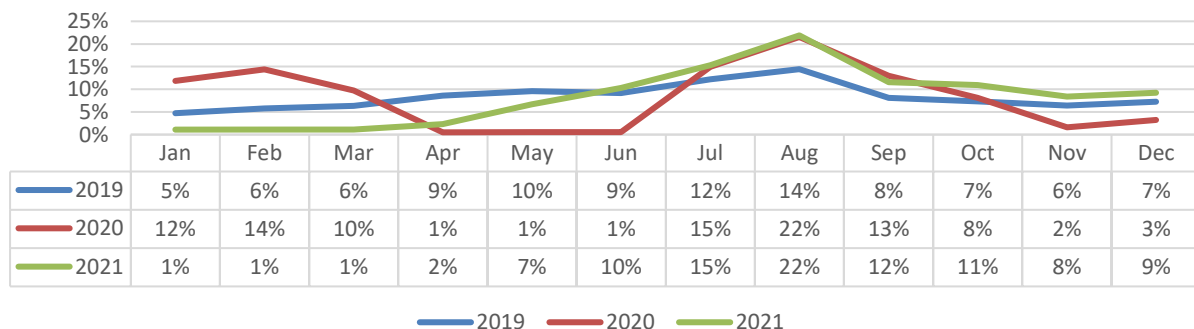
**Type of Employment**



**Seasonality - Day trip expenditure (England)**



**Seasonality - Overnight expenditure (England)**



Source: VisitBritain

## Volume of Tourism



## Staying visits in the county context

## Tunbridge Wells - 2021

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
<b>Kent</b>	<b>2,890</b>	<b>322.4</b>

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
<b>Kent</b>	<b>9,241</b>	<b>1,649.6</b>

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
<b>Kent</b>	<b>£477.1</b>	<b>£90.1</b>

## Staying Visitors - Accommodation Type

## Tunbridge Wells - 2021

### Trips by Accommodation

	UK		Overseas		Total	
Serviced	65,000	33%	10,000	46%	75,000	34%
Self catering	31,000	16%	1,400	6%	32,400	15%
Camping	13,000	7%	1,000	5%	14,000	6%
Static caravans	0	0%	0	0%	0	0%
Group/campus	0	0%	0	0%	0	0%
Paying guest	0	0%	100	1%	100	0%
Second homes	2,000	1%	300	1%	2,300	1%
Boat moorings	0	0%	0	0%	0	0%
Other	3,000	1%	200	1%	3,200	2%
Friends & relatives	82,000	42%	8,700	40%	90,700	42%
<b>Total 2021</b>	<b>196,000</b>		<b>21,700</b>		<b>217,700</b>	
Comparison 2020	123,000		21,600		144,600	
Difference	59%		0%		51%	

### Nights by Accommodation

	UK		Overseas		Total	
Serviced	166,000	29%	22,000	20%	188,000	28%
Self catering	64,000	11%	20,000	18%	84,000	12%
Camping	36,000	6%	3,000	3%	39,000	6%
Static caravans	0	0%	0	0%	0	0%
Group/campus	0	0%	0	0%	0	0%
Paying guest	0	0%	1,000	1%	1,000	0%
Second homes	8,000	2%	2,000	2%	10,000	2%
Boat moorings	0	0%	0	0%	0	0%
Other	12,000	2%	1,000	1%	13,000	2%
Friends & relatives	280,000	50%	60,000	55%	340,000	50%
<b>Total 2021</b>	<b>566,000</b>		<b>109,000</b>		<b>675,000</b>	
Comparison 2020	312,000		128,000		440,000	
Difference	81%		-15%		53%	

### Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£18,647,000	58%	£2,344,000	39%	£20,991,000	55%
Self catering	£4,462,000	14%	£883,000	15%	£5,345,000	14%
Camping	£929,000	3%	£144,000	2%	£1,073,000	3%
Static caravans	£0	0%	£0	0%	£0	0%
Group/campus	£13,000	0%	£26,000	1%	£39,000	0%
Paying guest	£0	0%	£62,000	1%	£62,000	0%
Second homes	£300,000	1%	£68,000	1%	£368,000	1%
Boat moorings	£0	0%	£0	0%	£0	0%
Other	£1,100,000	3%	£99,000	2%	£1,199,000	3%
Friends & relatives	£6,855,000	21%	£2,334,000	39%	£9,189,000	24%
<b>Total 2021</b>	<b>£32,306,000</b>		<b>£5,960,000</b>		<b>£38,266,000</b>	
Comparison 2020	£16,675,000		£6,167,000		£22,842,000	
Difference	94%		-3%		68%	

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

## Tunbridge Wells - 2021

### Trips by Purpose

	UK		Overseas		Total	
Holiday	114,000	58%	9,500	44%	123,500	57%
Business	2,000	1%	1,300	6%	3,300	2%
Friends & relatives	76,000	39%	9,400	43%	85,400	39%
Other	4,000	2%	1,100	5%	5,100	2%
Study	0	0%	400	2%	400	0%
<b>Total 2021</b>	<b>196,000</b>		<b>21,700</b>		<b>217,700</b>	
Comparison 2020	123,000		21,600		144,600	
Difference	59%		0%		51%	

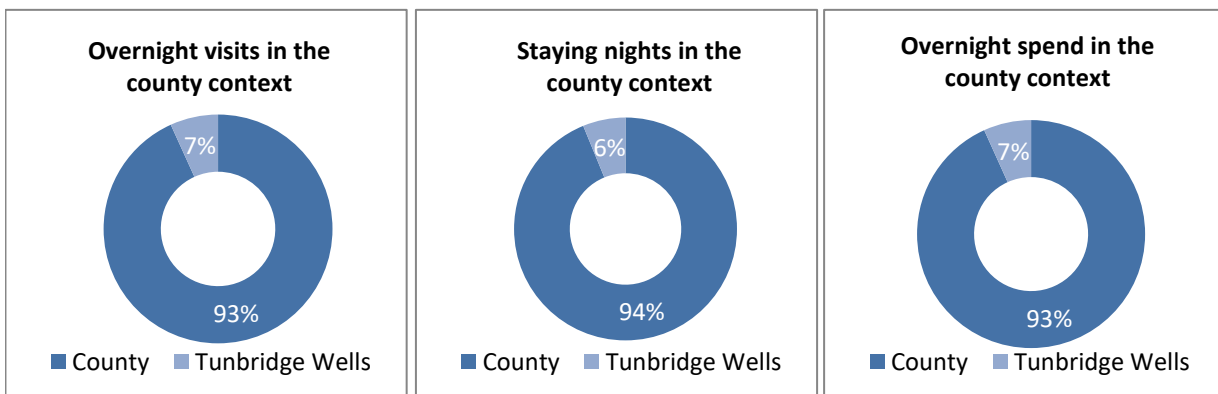
### Nights by Purpose

	UK		Overseas		Total	
Holiday	391,000	69%	36,000	33%	427,000	63%
Business	6,000	1%	2,200	2%	8,200	1%
Friends & relatives	158,000	28%	56,600	52%	214,600	32%
Other	11,000	2%	4,400	4%	15,400	3%
Study	0	0%	9,800	9%	9,800	1%
<b>Total 2021</b>	<b>566,000</b>		<b>109,000</b>		<b>675,000</b>	
Comparison 2020	312,000		128,000		440,000	
Difference	81%		-15%		53%	

### Spend by Purpose

	UK		Overseas		Total	
Holiday	£24,876,000	77%	£2,801,000	47%	£27,677,000	72%
Business	£969,000	3%	£179,000	3%	£1,148,000	3%
Friends & relatives	£6,138,000	19%	£1,967,000	33%	£8,105,000	21%
Other	£323,000	1%	£417,000	7%	£740,000	2%
Study	£0	0%	£596,000	10%	£596,000	2%
<b>Total 2021</b>	<b>£32,306,000</b>		<b>£5,960,000</b>		<b>£38,266,000</b>	
Comparison 2020	£16,675,000		£6,167,000		£22,842,000	
Difference	94%		-3%		68%	

### Proportion of staying visits in the county context

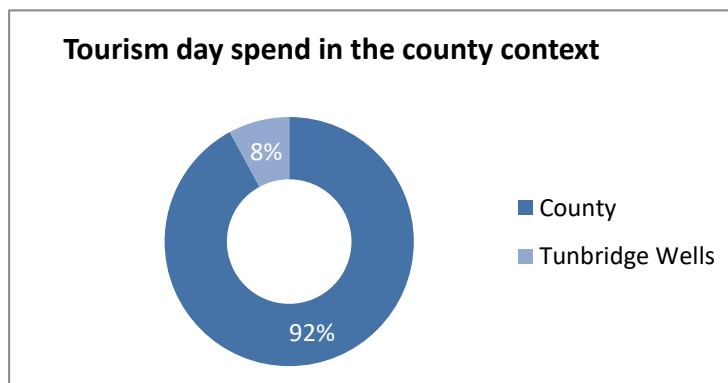
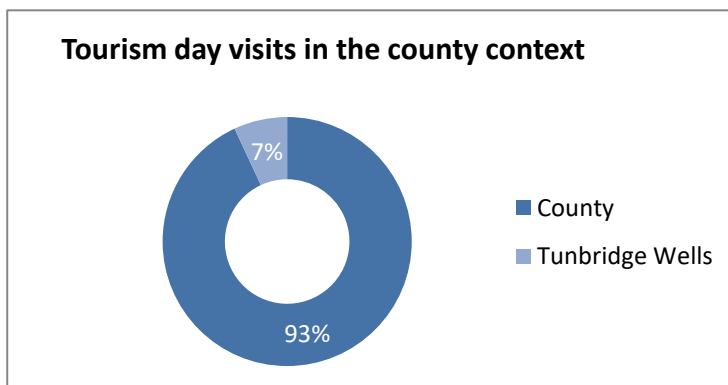


**Total Volume and Value of Day Trips**

		<b>Trips</b>	<b>Spend</b>
<b>Total</b>	<b>2021</b>	<b>3,349,000</b>	<b>£114,675,000</b>
<b>Comparison</b>	<b>2020</b>	<b>2,325,000</b>	<b>£77,129,000</b>
<b>Difference</b>		<b>44%</b>	<b>49%</b>

**Day Visitors in the county context**

<b>District</b>	<b>Day Visits (millions)</b>	<b>Day visits Spend (millions)</b>
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
<b>Kent</b>	<b>48.3</b>	<b>£1,451.5</b>



## Value of Tourism

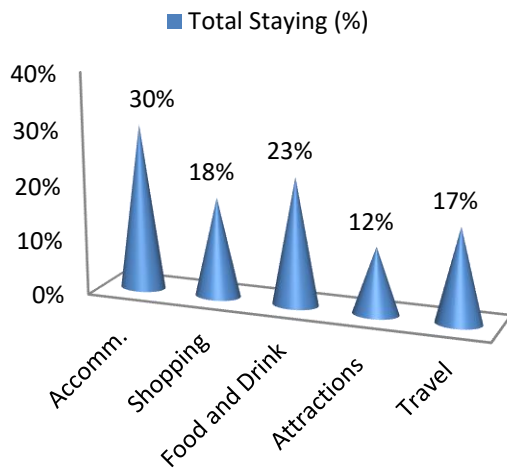
## Expenditure Associated with Trips

## Tunbridge Wells - 2021

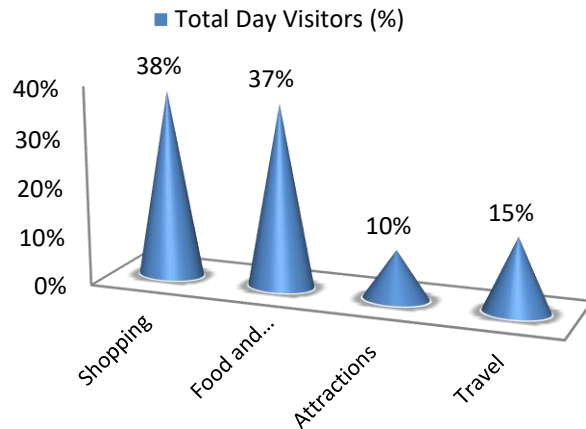
### Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£9,691,800	£5,169,000	£7,430,400	£3,876,700	£6,138,100	£32,306,000
Overseas tourists	£1,609,200	£1,788,000	£1,311,200	£655,600	£596,000	£5,960,000
<b>Total Staying</b>	<b>£11,301,000</b>	<b>£6,957,000</b>	<b>£8,741,600</b>	<b>£4,532,300</b>	<b>£6,734,100</b>	<b>£38,266,000</b>
<b>Total Staying (%)</b>	<b>30%</b>	<b>18%</b>	<b>23%</b>	<b>12%</b>	<b>17%</b>	<b>100%</b>
<b>Total Day Visitors</b>	<b>£0</b>	<b>£43,576,500</b>	<b>£42,429,800</b>	<b>£11,467,500</b>	<b>£17,201,200</b>	<b>£114,675,000</b>
<b>Total Day Visitors (%)</b>	<b>0%</b>	<b>38%</b>	<b>37%</b>	<b>10%</b>	<b>15%</b>	<b>100%</b>
<b>Total 2021</b>	<b>£11,301,000</b>	<b>£50,533,500</b>	<b>£51,171,400</b>	<b>£15,999,800</b>	<b>£23,935,300</b>	<b>£152,941,000</b>
<b>%</b>	<b>7%</b>	<b>33%</b>	<b>33%</b>	<b>11%</b>	<b>16%</b>	<b>100%</b>
Comparison 2020	£6,666,000	£35,243,000	£36,055,000	£10,368,000	£11,639,000	£99,971,000
Difference	70%	43%	42%	54%	106%	53%

### Breakdown of expenditure



### Breakdown of expenditure



### Other Expenditure Associated with Tourism Activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	Boats	Static vans	Friends & relatives	Total
£122,000	£0	£0	£7,784,000	£7,906,000

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

## Tunbridge Wells - 2021

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

		<b>Staying Visitor</b>	<b>Day Visitors</b>	<b>Total</b>
Accommodation		£11,560,000	£845,000	£12,405,000
Retail		£6,692,000	£43,486,000	£50,178,000
Catering		£8,496,000	£40,977,000	£49,473,000
Attractions		£4,705,000	£11,985,000	£16,690,000
Transport		£4,088,000	£10,430,000	£14,518,000
Non-trip spend		£7,906,000	£0	£7,906,000
<b>Total Direct</b>	<b>2021</b>	<b>£43,447,000</b>	<b>£107,723,000</b>	<b>£151,170,000</b>
Comparison	<b>2020</b>	<b>£25,551,000</b>	<b>£74,044,000</b>	<b>£99,595,000</b>
Difference		<b>70%</b>	<b>45%</b>	<b>52%</b>

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

## Supplier and Income Induced Turnover

		<b>Staying Visitor</b>	<b>Day Visitors</b>	<b>Total</b>
Indirect spend		£5,189,000	£14,345,000	£19,534,000
Non trip spending		£894,000	£0	£894,000
Income induced		£5,730,000	£14,148,000	£19,878,000
<b>Total</b>	<b>2021</b>	<b>£11,813,000</b>	<b>£28,493,000</b>	<b>£40,306,000</b>
Comparison	<b>2020</b>	<b>£7,980,000</b>	<b>£22,596,000</b>	<b>£30,576,000</b>
Difference		<b>48%</b>	<b>26%</b>	<b>32%</b>

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

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

		<b>Staying Visitor</b>	<b>Day Visitors</b>	<b>Total</b>
Direct		£43,447,000	£107,723,000	£151,170,000
Indirect		£11,813,000	£28,493,000	£40,306,000
<b>Total Value</b>	<b>2021</b>	<b>£55,260,000</b>	<b>£136,216,000</b>	<b>£191,476,000</b>
Comparison	<b>2020</b>	<b>£33,531,000</b>	<b>£96,640,000</b>	<b>£130,171,000</b>
Difference		<b>65%</b>	<b>41%</b>	<b>47%</b>

## Employment



## Employment

## Tunbridge Wells - 2021

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	197	29%	18	1%	215	9%
Retailing	81	12%	531	31%	612	26%
Catering	151	22%	881	52%	1,032	43%
Entertainment	52	8%	161	9%	213	9%
Transport	46	7%	117	7%	163	7%
Non-trip spend	147	22%	0	0%	147	6%
<b>Total FTE</b>	<b>2021</b>	<b>674</b>	<b>1,708</b>		<b>2,382</b>	
Comparison	2020	481	1,510		1,991	
Difference		40%	13%		20%	

Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Accommodation	296	30%	26	1%	322	9%
Retailing	121	13%	797	31%	918	26%
Catering	242	25%	1,321	52%	1,563	44%
Entertainment	79	8%	242	9%	321	9%
Transport	68	7%	176	7%	244	7%
Non-trip spend	167	17%	0	0%	167	5%
<b>Total Actual</b>	<b>2021</b>	<b>973</b>	<b>2,562</b>		<b>3,535</b>	
Comparison	2020	704	2,265		2,969	
Difference		38%	13%		19%	

### Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	113	308	421
Induced jobs	118	302	420
<b>Total FTE</b>	<b>2021</b>	<b>231</b>	<b>610</b>
Comparison	2020	148	443
Difference		56%	38%

Estimated actual jobs			
	Staying Visitor	Day Visitors	Total
Indirect jobs	130	355	485
Induced jobs	136	349	485
<b>Total Actual</b>	<b>2021</b>	<b>266</b>	<b>704</b>
Comparison	2020	171	512
Difference		56%	38%

## Total Tourism Jobs

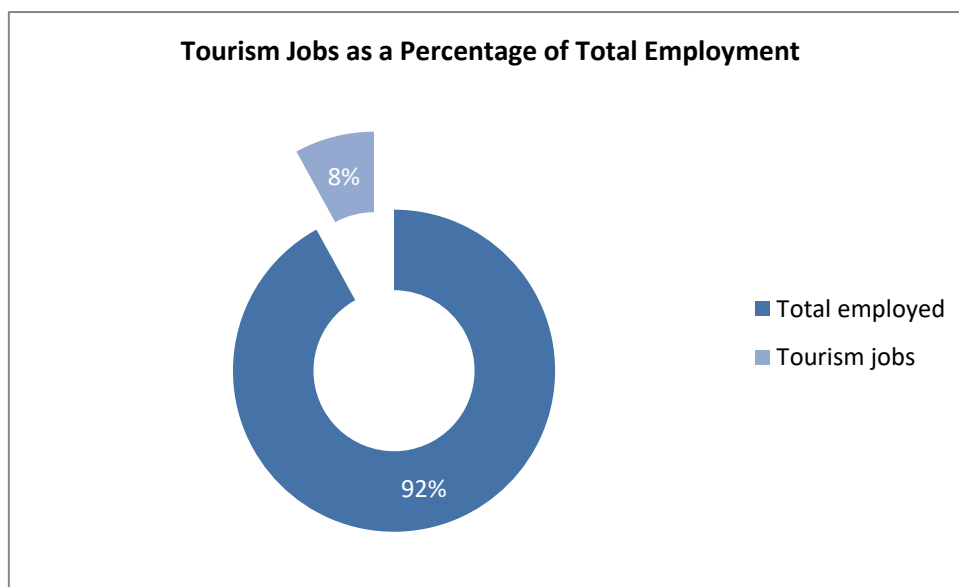
## Tunbridge Wells - 2021

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	674	75%	1,708	74%	2,382	74%
Indirect	113	12%	308	13%	421	13%
Induced	118	13%	302	13%	420	13%
<b>Total FTE</b>	<b>2021</b>	<b>905</b>	<b>2,318</b>		<b>3,223</b>	
Comparison	<b>2020</b>	<b>628</b>	<b>1,953</b>		<b>2,582</b>	
Difference		<b>44%</b>	<b>19%</b>		<b>25%</b>	
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Direct	973	79%	2,562	78%	3,535	78%
Indirect	130	10%	355	11%	485	11%
Induced	136	11%	349	11%	485	11%
<b>Total Actual</b>	<b>2021</b>	<b>1,239</b>	<b>3,266</b>		<b>4,505</b>	
Comparison	<b>2020</b>	<b>875</b>	<b>2,777</b>		<b>3,652</b>	
Difference		<b>42%</b>	<b>18%</b>		<b>23%</b>	

### Tourism Jobs as a Percentage of Total Employment

	Staying Visitor	Day Visitors	Total
Total employed	59,539	59,539	59,539
Tourism jobs	1,239	3,266	4,505
<b>Proportion all jobs</b>	<b>2%</b>	<b>6%</b>	<b>8%</b>
Comparison	<b>2020</b>	<b>2,777</b>	<b>3,652</b>
Difference	<b>42%</b>	<b>18%</b>	<b>23%</b>



**The key 2021 results of the Economic Impact Assessment are:**

**3.6 million trips** were undertaken in the area  
**3.3 million** day trips  
**0.2 million** overnight visits

**0.7 million** nights in the area as a result of overnight trips

**£151 million** spent by tourists during their visit to the area  
**£13 million** spent on average in the local economy each month.

**£38 million** generated by overnight visits  
**£115 million** generated from day trips.

**£191 million** spent in the local area as result of tourism, taking into account multiplier effects.

**4,505 jobs** supported, both for local residents from those living nearby.  
**3,535 tourism jobs** directly supported  
**970 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).





EUROPEAN UNION

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