The Economic Impact of Tourism on Kent and Medway
Estimates for 2006

County, District and Unitary Results

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1. INTRODUCTION

1.1 PURPOSE OF STUDY

This report examines the volume, value and resultant economic impact of tourism on the County of Kent and Medway. Results are presented at County, District and Unitary level. The study was undertaken by Tourism South East on behalf of Kent County Council, Medway Council and the Districts using a widely recognised, industry specific methodology, known as the Cambridge Model. To date, this approach has been widely applied across England and the South East region to produce an indicative outline of the scale of tourism activity on a local area basis.

1.2 THE CAMBRIDGE MODEL

The Cambridge Model is essentially a computer-based spreadsheet model that produces estimates from existing national and local information (e.g. accommodation stocks, inbound trips) of the level of tourism activity within a given local area. The volume of visits is translated into economic terms by estimating the amounts of spending by visitors based on their average spend per trip. In turn, the impact of that spending can be translated to estimate the effects in terms of business turnover and jobs.

The standard measures generated in this Model are: the total amount spent by visitors, the amount of income for local residents and businesses created by this spending, and the number of jobs supported by visitor spending. This report focuses on total revenue raised from visitor spending across Kent and the estimated number of full-time equivalent and actual jobs sustained by that spending.

The basic process of estimation used can be divided into three parts:

- Visitor trips and visitor spending at a regional/county level derived from national survey sources (county/district) ;
- Local supply data on accommodation, attractions and other factors specific to Kent;
- The use of multipliers derived from business surveys in England to estimate full time equivalent and actual jobs generated by visitor spending in the area.

The sophistication of the economic impact estimates will depend on the availability of detailed reliable local information to supplement national and regional data sources. Where such data is available from local surveys, then local variations can be explicitly included.

In its standard form, the Cambridge Model uses a range of local data including details of accommodation stock, local occupancy rates, population, employment, local wage rates and visits to attractions. It applies this locally sourced information to regional estimates of tourism volume and expenditure derived from the following national surveys:

- United Kingdom Tourism Survey (UKTS) 2006
- International Passenger Survey (IPS) 2006
- England Leisure Visits Survey (ELVS) 2005
- Census of Population 2001
- Labour Force Survey 2006
- Visits to Attractions Survey 2006
- New Earnings Survey 2006
- Census of Employment 2006

For the purpose of this study, average expenditure per person per trip is drawn from UKTS, IPS and ELVS and adjusted for inflation.

As the model uses national tourism surveys to estimate county breakdowns the template is always a year behind as the published annual national results from UKTS and IPS are not normally available until early autumn of the following year.

The following local data sources were gathered for the year 2006:

- Review of accommodation stock in each district.
- Collection of average bed occupancy data in each district
- Collection of number of visits to attractions data in each district
- Where available, footfall data for retail parks/shopping malls
- Average salaries in tourism sectors in each district
- Total employment in each district

1.3 OBJECTIVES OF ECONOMIC MODELLING

In applying the Cambridge Model, the main objectives are to provide information on the economic impact of visitors and raise awareness of the profile and local importance of tourism in Kent.

The Model will be used to:

- Derive estimates of the volume of domestic and overseas overnight visitors visiting the Kent during the year, by type of accommodation and purpose of visit;
- Derive estimates of the volume of day visitors visiting Kent during the year, by purpose of visit;
- Derive estimates of the value of tourism spending accruing to Kent, and the impact of this spending on different sectors of the local economy, in terms of jobs supported.

1.4 CAMBRIDGE MODEL VERSION II

Since the inception of the original Cambridge Model approach, a number of changes have occurred to the model’s methodology and the context of operation. Most importantly, autumn 2002 saw the launch of Cambridge Model Version II. This revised approach was developed from work undertaken for the South West Regional Development Agency and includes a number of enhancements. These include:

- Greater use of local data within the standardised model e.g. occupancy data, information on local wage rates
- Enhanced outputs, notably visitor nights by accommodation type, spend by accommodation type, impact of *‘additional trip related expenditure’*. The latter refers to expenditure associated with ongoing expenditure on accommodation in the case of visitors overnight at second homes or private boats, or additional spending by non visitors e.g. friends and relatives with whom the visitor is overnight.

2. EXECUTIVE SUMMARY

2.1 HEADLINE COUNTY RESULTS[1]

2.1.1 Value of tourism to Kent economy

£2,109,447,416 of expenditure generated through tourism trips

Average spend per trip by domestic visitor - £127.80
Average spend per trip by overseas visitor - £301.19
Average spend per trip by tourism day visitor - £33.84

£2,502,042,290 income for local businesses with addition of multiplier effect

37,532 FTE jobs and 50,669 actual jobs supported by tourism expenditure

7% of local employment supported by tourism expenditure

2.1.2 Changes in volume and value between 2003 and 2006

2006

- **4,877,341 staying trips made of which**
- **84% domestic and 16% overseas**
- **£764,810,211 spent by staying visitors**
- **39,735,142 tourism day trips**
- **£1,344,637,205 spent by tourism day visitors**
- **£140,471,000 additional trip related expenditure**
- **44,612,483 trips in total**
- **£2,109,447,416 expenditure in total**

2003

- **4,949,000 staying trips made of which**
- **84% domestic and 16% overseas**
- **£735,208,000 spent by staying visitors**
- **38,715,073 tourism day trips**
- **£1,123,323,234 spent by tourism day visitors**
- **£135,665,000 additional trip related expenditure**
- **43,663,073 trips in total**
- **£1,858,531,234 expenditure in total**

2.2 DOMESTIC OVERNIGHT TRIPS

2.2.1 It is estimated that almost 4 million staying trip were made to Kent in 2006 by visitors from other parts of the UK, a small decline of 2% compared to 2003. The decline is reflective of the national picture. The UK Tourism Study (UKTS) shows that since August 2002 there has been a steady decline in trips taken by UK residents to UK destinations. Holiday and VFR trips have experienced the largest decline over the past few years

2.2.2 The reasons for the decline in domestic staying trips are varied and complex. These include more trips being taken by UK residents abroad and the impact of low cost airlines, increasing use of broadband at

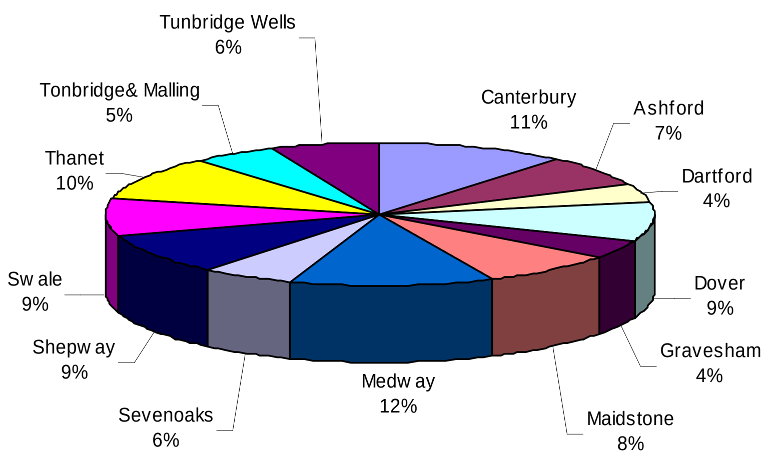
[1] ***The reported headline results are based on the bottom range estimates which exclude the impact of Blue Water on tourism.***

home enabling people to stay in touch 'virtually', the unpredictable UK weather, and competition from other leisure activities.

2.2.3 Another factor impacting on the VFR market is changes in University attendance. The rise in the number of students may have been a factor behind the growth of the VFR market during the mid-late 1990s. In recent years increased student debt may be leading more students to go to 'local' universities and thus reduce VFR trips.

2.2.4 Medway, Canterbury, and Thanet each received higher volumes of domestic staying trips than the other 11 districts in Kent.

Figure i: Distribution of domestic staying trips across County



2.2.5 Nearly half of domestic overnight trips to Kent involved staying in the homes of friends or relatives (48%). Thirty percent of trips involved staying in serviced accommodation (i.e. hotel, guest house or B&B). **See table 1**

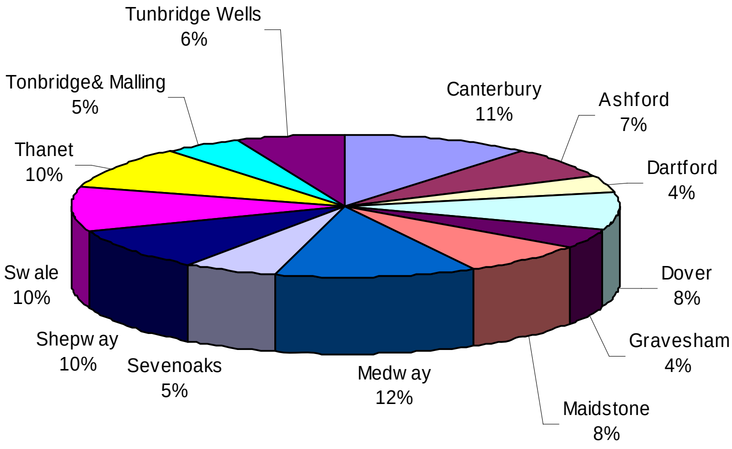
2.2.6 Fifteen percent of all domestic overnight trips involved staying in non-serviced accommodation (i.e. self-catering, camping, and static & touring caravan sites). Less than 1% (0.3%) of domestic staying trips involved staying on boats and 7% involved staying in more than one type of accommodation over the duration of the trip. **See table 1**

2.2.7 Domestic trips involved a total of 11.9 million bednights, providing an average trip length of length of 2.9 nights. **See table 4**

2.2.8 The distribution of domestic visitor nights across the County reveals that a slightly higher volume of bed nights was spent in Medway and Canterbury compared to the other districts in the County. The total volume of bednights was similar for Shepway, Swale and Thanet (10% each of total bednights).

2.2.9 The total volume of bednights was also similar for Dover and Maidstone (8% each of total bednights), for Sevenoaks and Tonbridge at 5% each of total bednights and for Dartford and Gravesham at 4% each of total bednights.

Figure ii: Distribution of domestic staying nights across County



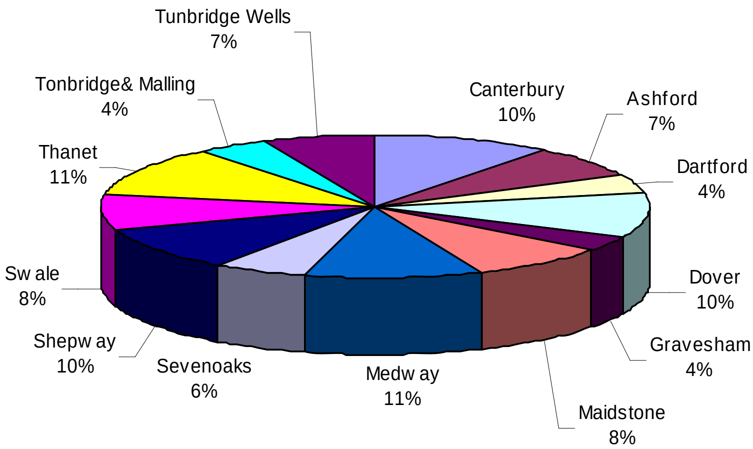
2.2.10 The majority of domestic trips took place for holiday purposes (52%). Business and VFR trips were also significant respectively accounting for 28% and 16% of all domestic overnight trips. **See figure 1**

2.2.11 It is estimated that the expenditure associated with domestic overnight trips (including VFR) was in the region of £525.13 million, providing an average spend of £43.93 per person per night and £127.80 per person per trip. **See table7 & 10**

2.2.12 Twenty-two percent of domestic staying trip expenditure in Kent was equally shared between Medway and Thanet. Thirty percent of domestic staying trip expenditure was equally shared between Canterbury, Dover and Shepway.

2.2.13 The destinations accounting for the next largest contribution of domestic spend was Maidstone and Swale each accounting for 8% of total domestic staying trip expenditure. This was followed by Ashford and Tunbridge Wells (7% each), Sevenoaks (6%), and Dartford, Gravesham and Tonbridge at 4% each.

Figure iii: Distribution of domestic staying trip spend across County



2.2.14 Nearly half of domestic overnight trip expenditure (47%) was made by those staying in serviced accommodation. Around a third (32%) of domestic trip expenditure was made by those staying in the home of friends and relatives. **See table 7**

2.2.15 Visitors staying in non-serviced accommodation (self catering/camping) accounted for 13% of total domestic trip expenditure. Visitors staying on boats accounted for 0.1% of total domestic trip expenditure. Four percent of domestic trip expenditure came from visitors staying in more than one type of accommodation over the duration of the trip. **See table 7**

2.2.16 53% of total domestic overnight trip expenditure was made by those on holiday in the County. A quarter of total domestic trip expenditure was made by made by those visiting friends and relatives and 18% was made by those on a business trip. **See figure 7**

2.2.17 5% of the total expenditure was spent by those visiting for ‘other’ purposes. Other purposes include education and training, house-hunting, job-hunting, social or sporting events and where there are more than one purpose of trip. **See figure 7**

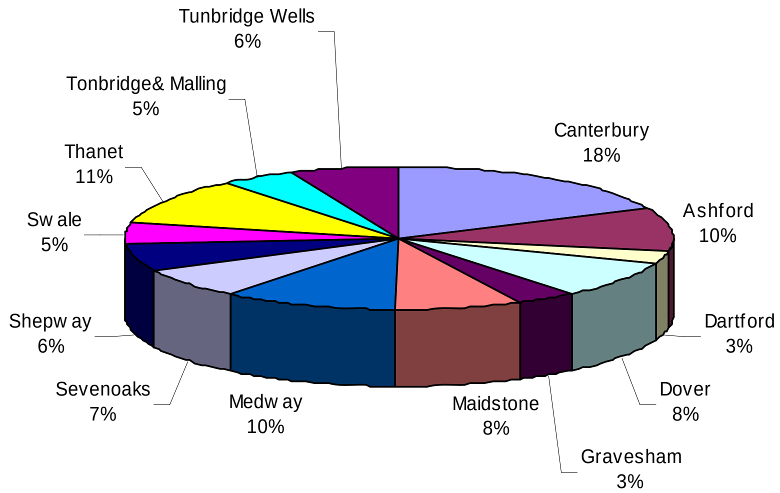
2.3 OVERSEAS OVERNIGHT TRIPS

2.3.1 782,569 overnight trips were made to Kent in 2006 by visitors from outside the UK, a small increase of 1% compared to 2003. **See table 2**

2.3.2 Once again the pattern is reflective of national trends. Figures released from the International Passenger Survey indicate continued growth for inbound tourism in 2006 with total visits over the January to December to England up by 6% on 2005 and spend also up by 8%. Much of this growth has been driven by the European and long haul west (Americas) markets (up 7% and 6% in terms of visits respectively).

2.3.3 In Kent, Canterbury (18%), Thanet (11%), Ashford (10%), and Medway (10%) were the four main destinations attracting the largest volume of overseas trips.

Figure iv: Distribution of overseas staying trips across County



2.3.4 For overseas visitors, serviced accommodation and the home of friends and relatives were equally used for accommodation during their trip (35% and 34% respectively). Thirteen percent of all overseas overnight trips involved staying in non-serviced accommodation. **See table 2**

2.3.5 1% of trips involved staying in a second home. Reflecting the presence of a minority of language students, around 10% of overseas trips involved staying in lodgings as paying guests. The remaining 9% involved staying in more than one type of accommodation over the duration of the trip. **See table 2**

2.3.6 With regard to the purpose of trips, the model calculates that the largest proportion of overseas trips to Kent in 2006 was divided equally between holiday purposes and visiting friends and family (33% and 34% respectively). **See figure 2**

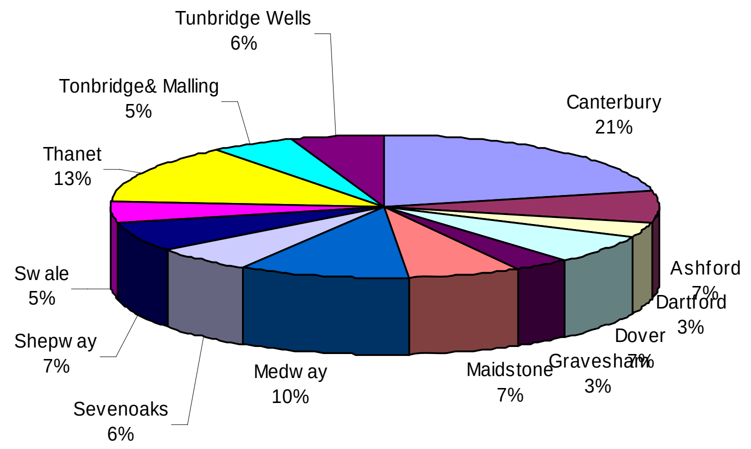
2.3.7 A fifth of all overseas staying trips were for business purposes (21%). Around 5% of overseas trips were made by language students. The remaining 7% were made for a number of other reasons. **See figure 2**

2.3.8 Overseas trips involved a total of 5.3 million bednights, providing an average trip length of 7.1 nights. **See table 5**

2.3.9 A fifth (21%) of overseas visitor nights was spent in Canterbury. Thirteen percent of overseas visitor nights was spent in Thanet and 10% was spent in Medway. **See figure v**

2.3.10 Twenty-eight percent of overseas visitor nights was equally shared between Ashford, Dover, Maidstone and Shepway. Twelve percent of overseas visitor nights was equally shared Sevenoaks and Tunbridge Wells, 10% was equally shared between Swale and Tonbridge and the remaining 6% was equally shared between Dartford and Gravesham. **See figure v below**

Figure v: Distribution of overseas staying nights across County



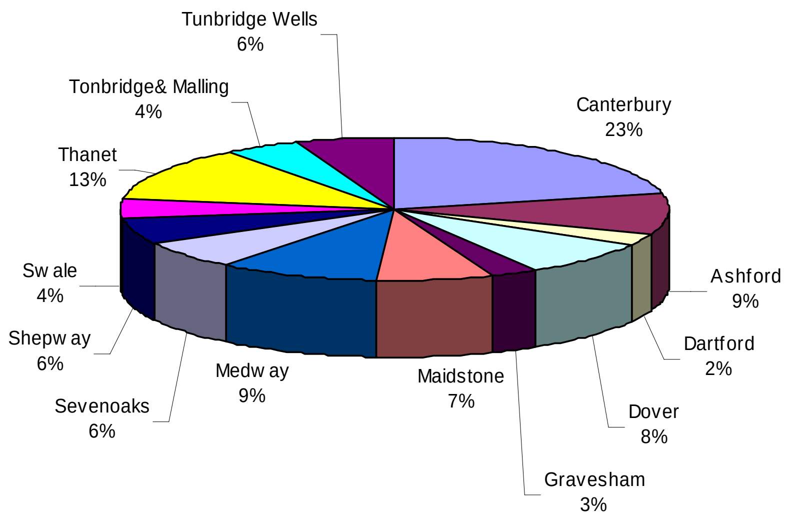
2.3.11 Expenditure associated with overseas overnight trips was in the region of £239.6 million, an increase of 3% compared to 2003. **See table 8**

2.3.12 VFR and holiday purposes each represented 29% overseas trip expenditure respectively. Twenty percent of overseas trip expenditure was made by visitors staying in the County for business purposes. **See figure 8**

2.3.13 Foreign language students contributed 18% towards total overseas trip spend. Ten percent of the total was spent by those visiting for 'other' purposes. **See figure 8**

2.3.14 The model calculates that in 2006, the greatest proportion of overseas expenditure in Kent took place in Canterbury (23%) followed by Thanet (13%). **See figure vi overleaf**

Figure vi: Distribution of overseas staying trip spend across County



2.3.15 Thirty-eight percent of total overseas overnight trip expenditure in Kent was made by those staying in the homes of friends and relatives. **See table 8**

2.3.16 Twenty-three precent of total overseas trip expenditure was made by those staying in serviced accommodation. Eighteen percent of overseas trip expenditure was made by those staying in non-serviced accommodation. **See table 8**

2.3.17 Fifteen percent of overseas trip expenditure was made by those staying in lodgings, 5% by those staying in second homes and a further 1% by those staying in 'other' accommodation. **See table 8**

2.3.18 For overseas overnight visitors, the average expenditure per person is estimated to be approximately £45.22 per night and £301.19 per trip. **See table 10**

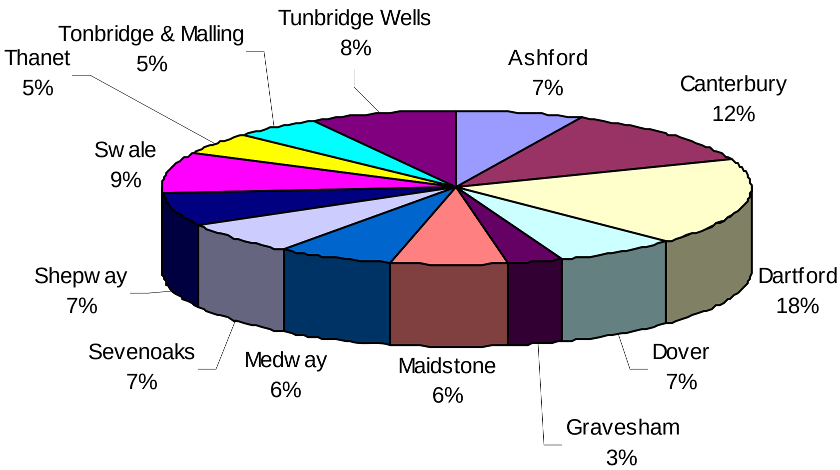
2.4 TOURISM DAY TRIPS

2.4.1 To maintain consistency with the 2003 study we provide total day trips with and without the impact of Blue Water Shopping Mall represented as *top range* and *bottom range* estimates.

2.4.2 At the top range, it is estimated that approximately 47.7 million tourism day trips were made to and within the County for a variety of leisure purposes in 2006, representing a 2% increase when compared to the 2003 top range estimate. **See table 11**

2.4.3 The largest volume of tourism day trips were made to Dartford (18%), reflecting the significant role of Blue Water in attracting day trips to the area. **See figure vii**

Figure vii: Distribution of tourism day trips across County



2.4.4 At the bottom range, it is estimated that approximately 39.7 million tourism day trips were made to and within the County for a variety of leisure purposes in 2006, representing a 3% increase when compared to the 2003 bottom range estimate. **See Table 11**

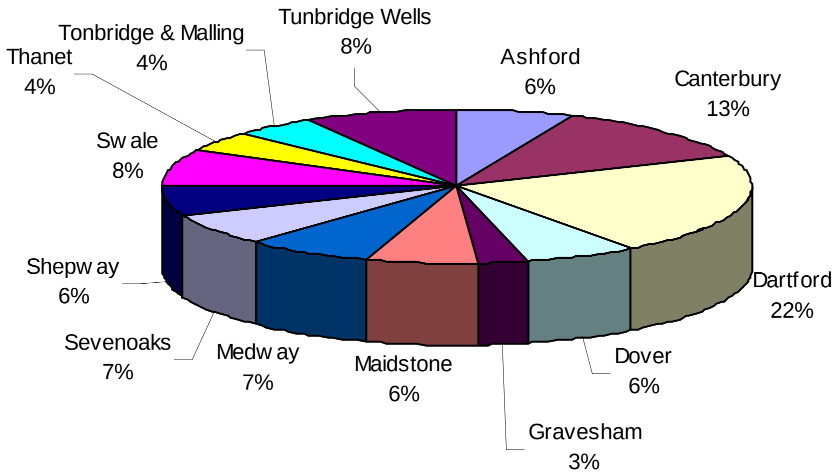
2.4.5 At the top range, expenditure associated with tourism day trips is estimated to have been in the region of £1.6 billion, representing a 17% increase when compared to the 2003 top range figure. **See Table 12**

2.4.6 With the 3% increase in tourism day trips, the 17% increase in expenditure appears very high. This is due to an increase in the average expenditure per visit of 15% from £29.46 in 2003 to £33.84 in 2006. The spend data is drawn from the 2005 ELVS and adjusted for inflation.

2.4.7 The largest proportion of tourism day trip expenditure (a fifth of the total) involved trips to Dartford (22%). This reflects the impact of Blue Water on day trip volume and expenditure.

2.4.8 Expenditure associated with tourism day trips was lowest in Gravesham. **See figure viii below**

Figure viii: Distribution of tourism day trip expenditure across County



2.4.9 At the bottom range, expenditure associated with tourism day trips is estimated to have been in the region of £1.3 million, representing an increase of 18% when compared to the 2003 bottom range figure. **See Table 12**

2.5 TOTAL ALL TRIPS

2.5.1 Using top range figures it is estimated that in total 52.6 million trips were made to Kent in 2006. Of these, 8% involved domestic overnight trips, 1% involved overseas overnight trips and 91% involved tourism day trips.

2.5.2 Using bottom range figures it is estimated that in total 44.6 million trips (top range estimate) were made to Kent in 2006. Of these, 9% involved domestic overnight trips, 2% involved overseas overnight trips and 89% involved tourism day trips.

2.5.3 Using top range figures it is estimated that in total £2.3 billion was spent by visitors on their trips. Of this expenditure, 22% was spent by domestic overnight visitors, 12% was spent by overseas overnight visitors and 66% was spent by tourism day visitors.

2.5.4 Using bottom range figures it is estimated that in total £2.1 billion was spent by visitors on their trips. Of this expenditure, 24% was spent by domestic overnight visitors, 13% was spent by overseas overnight visitors and 63% was spent by tourism day visitors.

2.5.5 Expenditure on the maintenance on second homes, expenditure on boat related repairs and up-keep and expenditure made by friends and relatives contributed a further £140,471,000 for the Kent visitor economy. **See table 18**

2.7.1 Using top range figures, it is estimated that with the addition of expenditure on second homes, boats and by friends and relatives, total expenditure increased to £2,520,411. **See table 19a**

2.7.2 Using bottom range figures, it is estimated that with the addition of expenditure on second homes, boats and by friends and relatives, total expenditure increased to £2,249,918,416. **See table 19a**

2.6 SECTOR BREAKDOWN OF TRIP EXPENDITURE

2.6.1 Unsurprisingly, the largest volume of domestic staying trip expenditure went towards the cost of accommodation (34%) This was followed by food and drink (22%) and shopping (14%).and attractions and other entertainment. (11%). Fifteen percent of domestic staying trip expenditure went towards travel and transport costs which include petrol and parking costs. **See table 15**

2.6.2 Thirty percent of overseas staying trips expenditure also involved the cost of commercial accommodation. However, overseas visitors spent proportionately more on shopping and food and drink than domestic visitors (28% and 21% respectively). 12% of overseas staying trip expenditure went on visitor attractions and other entertainment. Nine percent of overseas staying trip expenditure went towards transport costs. **See table 16**

2.6.3 For tourism day trips, the largest proportion of trip expenditure involved the purchase of food and drink (38%) followed closely by shopping (36%). 15% of day trip expenditure went towards travel costs and a further 11% went towards visitor attractions and other entertainment. **See table 17**

2.7 ECONOMIC IMPACT ESTIMATES

2.7.3 The model provides an estimate for the magnitude of additional business turnover generated through the impact of visitor related expenditure in Kent. Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. Furthermore, it is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

2.7.3 Drawing together direct and indirect/induced business turnover at the top range, the total value of visitor expenditure to the Kent economy in 2006 is estimated to be in the region of £2,869,403,532. **See table 19b**

2.7.4 Drawing together direct and indirect/induced business turnover at the bottom range, the total value of visitor expenditure to the Kent economy in 2006 is estimated to be in the region of £2,502,042,290. **See table 19b**

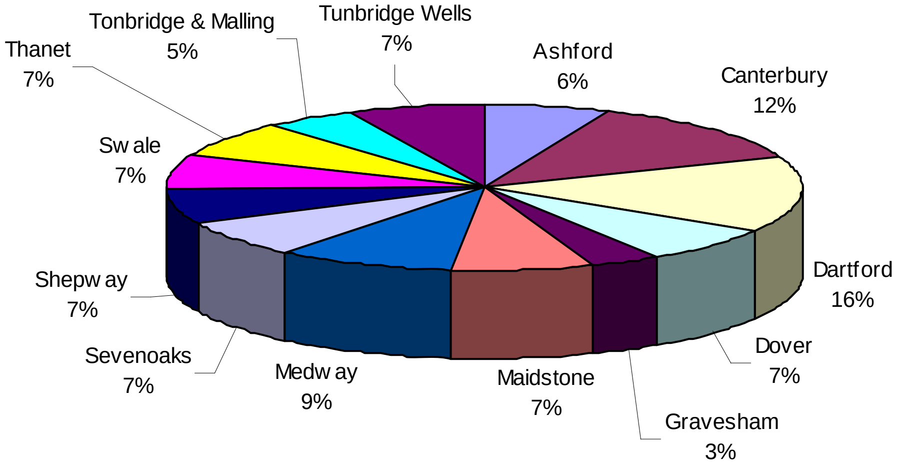
2.7.5 Based on top range estimates, the distribution of business turnover across the County reveals that 16% of total turnover was received by businesses in Dartford, largely due to the high value of special shopping day trips to Blue Water. **See figure ix overleaf**

2.7.6 Twelve percent of turnover across the County was received by businesses in Canterbury and 9% was received by businesses in Medway. **See figure ix overleaf**

2.7.7 The value of total turnover was lower for the other destinations. Businesses in Dover, Maidstone, Sevenoaks, Shepway, Swale, Thanet and Tunbridge Wells each received around 7% of the total turnover. **See figure ix overleaf**

2.7.8 Six percent of turnover across the County was received by businesses in Ashford, 5% by businesses in Tonbridge & Malling and 3% by businesses in Gravesham. **See figure ix overleaf**

Figure ix: Distribution of total business turnover across County



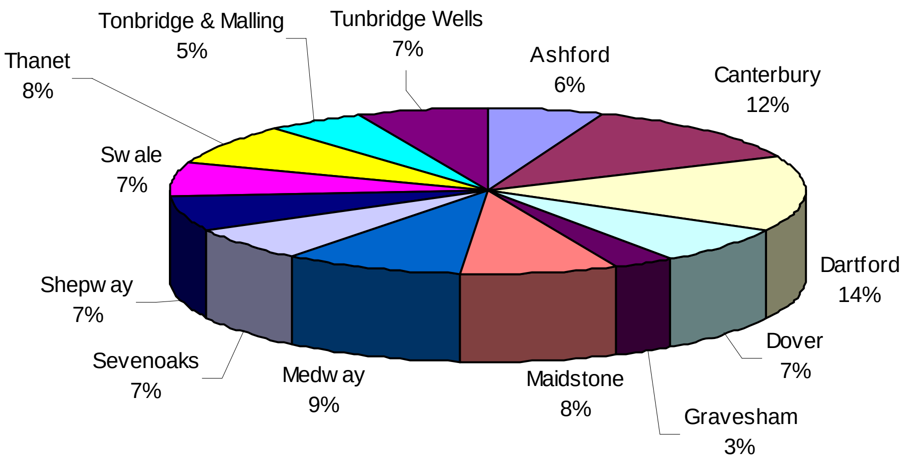
2.7.9 At the top range, it is estimated that around 43,043 FTE Jobs were supported by total business turnover in 2006. With the addition of part-time and seasonal jobs, it is estimated that around 58,874 Actual Jobs were supported across the County. Since 2003, Actual Jobs supported by visitor expenditure has increased by 5%. **See table 20a**

2.7.10 At the bottom range, it is estimated that around 37,532 FTE Jobs were supported by total business turnover in 2006. With the addition of part-time and seasonal jobs, it is estimated that around 50,669 Actual Jobs were supported across the County. **See table 20a**

2.7.11 Based on the top range estimate, the largest proportion of Actual Jobs created and sustained in the County were in Dartford and Canterbury (14% and 12% respectively). In Medway tourism related business turnover supported 9% of Actual Jobs across the County. In Maidstone and Thanet tourism related business turnover supported 8% respectively of Actual Jobs across the County.

2.7.12 Seven percent of Actual Jobs were supported in Dover, Sevenoaks and Shepway, and Swale, 6% of Actual Jobs were supported in Ashford, 5% in Tonbridge & Malling and 3% in Gravesham.

Figure x: Distribution of Actual Jobs across County



2.7.13 Based on local employment data, it is estimated that the 58,874 Actual Jobs supported by tourism activity represents 8% of total employment across the County at the top range or 7% at the bottom range. **See table 20c**

3. TABLES OF RESULTS

3.1 Volume of overnight trips by accommodation

Table 1: Number of domestic staying trips by accommodation

	Ashford	Canterbury	Dartford	Dover	Gravesham	Maidstone	Medway	Sevenoaks	Shepway	Swale	Thanet	Tonbridge	Tunbridge	Kent	
Serviced	105,302	101,097	59,147	153,128	42,487	108,626	113,611	74,094	113,611	37,314	184,248	35,690	93,853	1,222,208	30%
Self catering	16,830	13,378	0	10,573	432	7,984	1,295	3,021	12,515	5,394	9,925	6,257	12,515	100,119	3%
Caravan/tents	18,562	89,106	0	41,156	0	14,167	6,901	3,632	107,522	140,006	31,711	7,810	14,893	475,466	10%
Group/campus	5,245	57,351	0	3,038	0	809	2,351	763	0	855	1,588	183	413	72,596	2%
Second homes	1,749	3,885	268	4,063	417	1,474	3,475	1,124	5,455	2,843	6,787	1,072	1,429	34,041	1%
Boat moorings[2]	0	0	0	1,862	0	743	5,741	0	0	1,482	3,340	0	0	13,168	*<1%*
Other/mixed[3]	15,214	20,048	12,732	15,496	14,185	20,592	36,973	16,199	14,262	18,199	18,777	15,940	15,417	234,034	6%
SFR	126,170	166,257	105,585	128,512	117,636	170,767	306,621	134,336	118,276	153,220	155,717	132,192	127,853	1,943,142	48%
2006	289,073	451,120	177,731	357,828	175,157	325,161	476,968	233,169	371,642	359,313	412,093	199,144	266,373	4,094,772	100%
2003	279,000	440,000	173,000	352,000	179,000	325,000	496,000	234,000	361,000	443,000	411,000	215,000	264,000	4,172,000	
% change	4%	3%	3%	2%	-2%	0%	-4%	0%	3%	-19%	0%	-7%	1%	-2%	

[2] *Information on boat use is not available for overseas tourists.*

[3] *Trips which involve staying in more than one type of accommodation over the duration of the trip. For overseas trips these also include nights spent in transit, in lorry cabs and other temporary accommodation.*

Table 2: Number of overseas staying trips by accommodation

	Ashford	Canterbury	Dartford	Dover	Gravesham	Maidstone	Medway	Sevenoaks	Shepway	Swale	Thanet	Tonbridge	Tunbridge	Kent	
Serviced	54,298	36,248	3,017	36,199	6,810	27,149	22,323	18,703	9,790	4,223	21,478	9,351	22,323	271,912	35%
Self catering	1,789	1,711	0	1,124	46	848	138	321	1,330	573	1,055	665	1,330	10,930	2%
Caravans/tents	1,330	7,302	0	2,949	0	1,015	494	260	7,705	6,205	2,272	560	1,067	31,159	4%
Group/campus	1,340	48,617	0	776	0	207	600	195	0	218	405	47	105	52,510	7%
Second homes	506	1,347	78	1,176	121	426	1,006	325	1,578	823	1,964	310	413	10,073	1%
Boat moorings	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0%
Other/mixed	4,197	6,588	3,512	4,275	3,913	5,681	10,200	4,469	3,935	5,021	5,180	4,398	4,253	65,622	9%
Paying guests[4]	0	16,937	0	2,772	0	2,772	2,772	2,772	8,316	0	33,264	2,772	2,772	75,149	10%
SFR	16,922	26,560	15,809	17,236	15,777	22,903	41,124	18,017	15,863	19,242	20,885	17,729	17,147	265,214	34%
2006	80,382	145,310	22,416	66,507	26,667	61,001	78,657	45,062	48,517	36,305	86,503	35,832	49,410	782,569	100%
2003	78,000	140,000	24,000	71,000	27,000	59,000	77,000	47,000	47,000	36,000	86,000	37,000	48,000	777,000	
% change	3%	4%	-7%	-6%	-1%	3%	2%	-4%	3%	1%	1%	-3%	3%	1%	

[4] *Lodging as a guest in local person's home; commonly used by short stay language students. Same estimate used for Dover, Maidstone, Medway, Sevenoaks, Tonbridge, and Tunbridge due to absence of any local data.*

Table 3: Number of total staying trips by accommodation

	Ashford	Canterbury	Dartford	Dover	Gravesham	Maidstone	Medway	Sevenoaks	Shepway	Swale	Thanet	Tonbridge	Tunbridge	Kent	
Serviced	159,600	137,345	62,164	189,327	49,297	135,775	135,934	92,797	123,401	41,537	205,726	45,041	116,176	1,494,120	28%
Self catering	18,619	15,089	0	11,697	478	8,832	1,433	3,342	13,845	5,967	10,980	6,922	13,845	111,049	2%
Caravans/tents	19,892	96,408	0	44,105	0	15,182	7,395	3,892	115,227	146,211	33,983	8,370	15,960	506,625	10%
Group/campus	6,585	105,968	0	3,814	0	1,016	2,951	958	0	1,073	1,993	230	518	125,106	3%
Second homes	2,255	5,232	346	5,239	538	1,900	4,481	1,449	7,033	3,666	8,751	1,382	1,842	44,114	1%
Boat moorings	0	0	0	1,862	0	743	5,741	0	0	1,482	3,340	0	0	13,168	*<1%*
Other/mixed	19,411	26,636	16,244	19,771	18,098	26,273	47,173	20,668	18,197	23,220	23,957	20,338	19,670	299,656	7%
Paying guests	0	16,937	0	2,772	0	2,772	2,772	2,772	8,316	0	33,264	2,772	2,772	75,149	2%
SFR	143,092	192,817	121,394	145,748	133,413	193,670	347,745	152,353	134,139	172,462	176,602	149,921	145,000	2,208,356	48%
2006	369,455	596,430	200,147	424,335	201,824	386,162	555,625	278,231	420,159	395,618	498,596	234,976	315,783	4,877,341	100%
2003	357,000	580,000	197,000	423,000	206,000	384,000	573,000	281,000	408,000	479,000	497,000	252,000	312,000	4,949,000	
% change	3%	3%	2%	0%	-2%	1%	-3%	-1%	3%	-17%	0%	-7%	1%	-1%	

Figure 1: Domestic staying trips by purpose

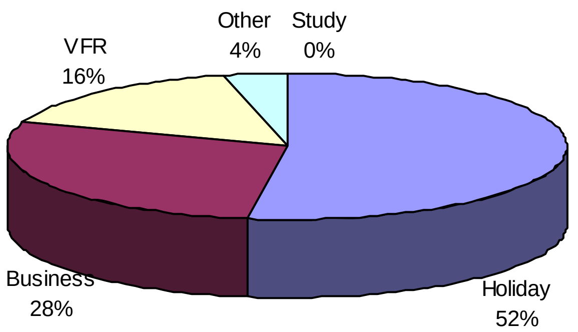


Figure 2: Overseas staying trips by purpose

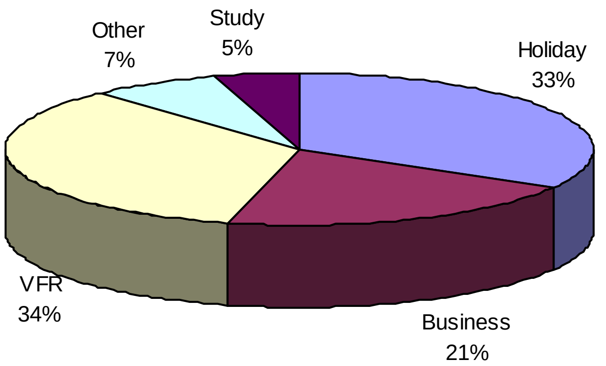
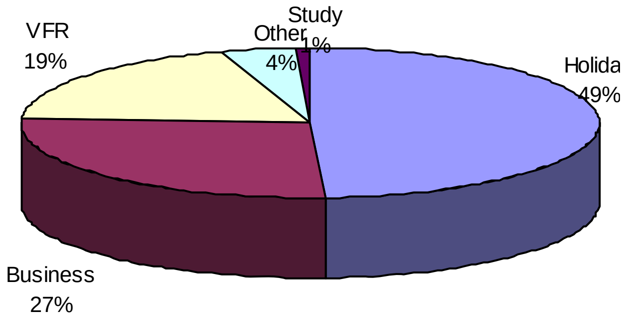


Figure 3: All staying trips by purpose



3.2 Volume of tourism nights by accommodation

Table 4: Number of domestic nights by accommodation

	Ashford	Canterbury	Dartford	Dover	Gravesham	Maidstone	Medway	Sevenoaks	Shepway	Swale	Thanet	Tonbridge	Tunbridge	Kent	
Serviced	249,729	239,755	140,269	363,151	100,761	257,612	269,435	175,718	269,435	88,492	436,953	84,640	222,576	2,898,526	22%
Self catering	68,565	54,501	0	43,073	1,758	32,525	5,274	12,307	50,984	21,976	40,436	25,492	50,984	407,875	4%
Caravans/tents	72,751	349,234	0	161,306	0	55,524	88,751	14,237	421,417	558,569	124,289	30,610	58,372	1,935,060	14%
Group/campus	10,363	113,309	0	6,002	0	1,598	4,644	1,508	0	1,689	3,136	362	816	143,427	1%
Second homes	5,138	11,412	787	11,937	1,224	4,329	10,210	3,301	16,025	8,352	19,939	3,148	4,198	100,000	1%
Boat moorings	0	0	0	5,371	0	2,144	16,559	0	0	4,275	9,634	0	0	37,983	*<1%*
Other/mixed	37,724	49,709	31,569	38,424	35,172	51,058	91,677	40,165	35,364	45,124	46,558	39,524	38,227	580,295	5%
SFR	379,797	500,464	317,830	386,845	354,107	514,042	922,987	404,377	356,035	461,222	468,737	397,925	384,862	5,849,230	52%
2006	824,067	1,318,385	490,455	1,016,108	493,023	918,831	1,409,537	651,613	1,149,259	1,189,699	1,149,682	581,701	760,035	11,952,395	
2003	781,000	1,269,000	482,000	1,002,000	503,000	899,000	1,422,000	647,000	1,082,000	1,445,000	1,163,000	611,000	728,000	12,034,000	
% change	6%	4%	2%	1%	-2%	2%	-1%	1%	6%	-18%	-1%	-5%	4%	-1%	

Table 5: Number of overseas nights by accommodation

	Ashford	Canterbury	Dartford	Dover	Gravesham	Maidstone	Medway	Sevenoaks	Shepway	Swale	Thanet	Tonbridge	Tunbridge	Kent	
Serviced	150,242	90,269	10,347	100,161	18,842	75,121	61,766	51,750	27,090	11,685	59,429	25,875	61,766	744,343	11%
Self catering	34,178	32,706	0	21,471	876	16,213	2,629	6,134	25,414	10,954	20,156	12,707	25,414	208,852	4%
Caravans/tents	5,296	29,010	0	11,742	0	4,042	1,969	1,036	30,676	24,743	9,048	2,228	4,249	124,039	2%
Group/campus	14,094	511,505	0	8,162	0	2,174	6,317	2,051	0	2,297	4,266	492	1,110	552,468	11%
Second homes	6,263	16,675	960	14,552	1,493	5,277	12,447	4,025	19,537	10,181	24,307	3,838	5,117	124,672	2%
Boat moorings	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0%
Other/mixed	7,664	12,029	6,413	7,806	7,145	10,373	18,625	8,160	7,184	9,167	9,459	8,030	7,766	119,821	2%
Paying guests	0	199,129	0	32,591	0	32,591	32,591	32,591	97,773	0	391,092	32,591	32,591	883,540	17%
SFR	159,871	250,932	149,360	162,838	149,057	216,380	388,521	170,218	149,869	191,235	197,309	167,502	162,003	2,515,095	49%
2006	377,608	1,142,254	167,080	359,323	177,413	362,170	524,864	275,965	357,542	260,263	715,065	253,263	300,017	5,272,827	100%
2003	351,000	1,086,000	189,000	381,000	176,000	346,000	519,000	280,000	342,000	255,000	703,000	249,000	286,000	5,163,000	
% change	8%	5%	-12%	-6%	1%	5%	1%	-1%	5%	2%	2%	2%	5%	2%	

Table 6: Number of total nights by accommodation

	Ashford	Canterbury	Dartford	Dover	Gravesham	Maidstone	Medway	Sevenoaks	Shepway	Swale	Thanet	Tonbridge	Tunbridge	Kent	
Serviced	399,971	330,024	150,616	463,312	119,603	332,733	331,201	227,468	296,525	100,177	496,382	110,515	284,342	3,642,869	19%
Self catering	102,743	87,207	0	64,544	2,634	48,738	7,903	18,441	76,398	32,930	60,592	38,199	76,398	616,727	4%
Caravans/tents	78,047	378,244	0	173,048	0	59,566	90,720	15,273	452,093	583,312	133,337	32,838	62,621	2,059,099	11%
Group/campus	24,457	624,814	0	14,164	0	3,772	10,961	3,559	0	3,986	7,402	854	1,926	695,895	4%
Second homes	11,401	28,087	1,747	26,489	2,717	9,606	22,657	7,326	35,562	18,533	44,246	6,986	9,315	224,672	1%
Boat moorings	0	0	0	5,371	0	2,144	16,559	0	0	4,275	9,634	0	0	37,983	*<1%*
Other/mixed	45,388	61,738	37,982	46,230	42,317	61,431	110,302	48,325	42,548	54,291	56,017	47,554	45,993	700,116	4%
Paying guests	0	199,129	0	32,591	0	32,591	32,591	32,591	97,773	0	391,092	32,591	32,591	883,540	5%
SFR	539,668	751,396	467,190	549,683	503,164	730,422	1,311,508	574,595	505,904	652,457	666,046	565,427	546,865	8,364,325	51%
2006	1,201,675	2,460,639	657,535	1,375,431	670,436	1,281,001	1,934,401	927,578	1,506,801	1,449,962	1,864,747	834,964	1,060,052	17,225,222	100%
2005	1,132,000	2,355,000	671,000	1,383,000	679,000	1,245,000	1,941,000	927,000	1,424,000	1,700,000	1,866,000	860,000	1,014,000	17,197,000	
% change	6%	4%	-2%	-1%	-1%	3%	0%	0%	6%	-15%	0%	-3%	5%	0%	

Figure 4: Domestic staying trip nights by purpose

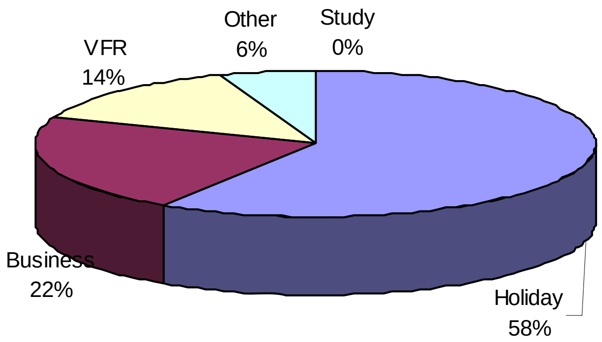


Figure 5: Overseas staying trip nights by purpose

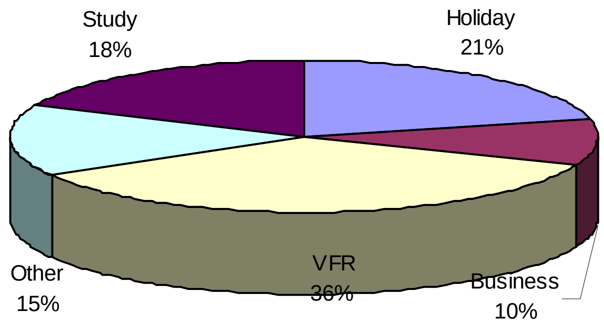
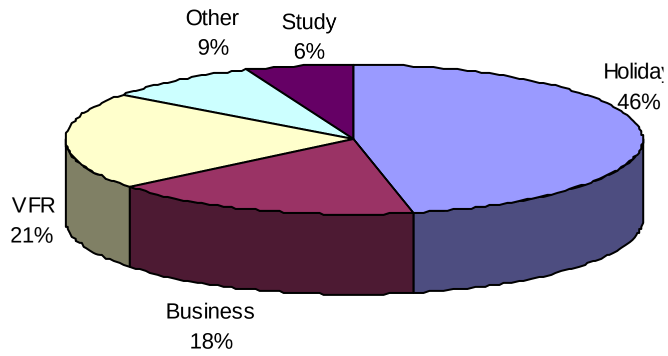


Figure 6: All staying trip nights by purpose



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[5] *For the purpose of this study, purpose of visit is divided into the following categories:*

- *Holiday trips*
- *Business trips (including meeting and conferences)*
- *Visits to friends and relatives (VFR). Visits to friends and relatives are for social and personal reasons, and do not include holiday trips staying with friends and relatives*
- *Language study (language school courses for overseas visitors)*
- *Other purposes including education and training, social or sporting events, house hunting, weddings and funerals, or when visitors have multiple reasons for visiting, or where no particular purpose is dominant, e.g. business and leisure.*

3.3 Value of overnight trips by accommodation

Table 7: Domestic staying trip expenditure by accommodation

	Ashford	Canterbury	Dartford	Dover	Gravesham	Maidstone	Medway	Sevenoaks	Shepway	Swale	Thanet	Tonbridge	Tunbridge	Kent	
Serviced	£21,476,691	£20,618,944	£12,063,170	£31,230,979	£8,665,408	£22,154,611	£23,171,371	£15,111,764	£23,171,371	£7,610,335	£37,577,920	£7,279,016	£19,141,568	£249,273,148	47%
Self catering	£2,605,478	£2,071,021	£0	£1,636,774	£66,807	£1,235,932	£200,421	£467,650	£1,937,407	£835,089	£1,536,564	£968,703	£1,937,407	£15,499,253	4%
Caravans/tent	2,546,293	12,223,200	0	5,645,694	0	1,943,354	3,106,290	498,296	14,749,561	19,549,906	4,350,124	1,071,336	2,043,014	67,727,068	8%
Group/campus	£331,618	£3,625,892	£0	£192,049	£0	£51,149	£148,621	£48,254	£0	£54,044	£100,368	£11,581	£26,115	£4,589,691	1%
Second homes	£231,198	£513,555	£35,418	£537,167	£55,094	£194,797	£459,445	£148,557	£721,141	£375,820	£897,245	£141,670	£188,894	£4,500,001	<1%
Boat moorings	£0	£0	£0	£80,567	£0	£32,155	£248,385	£0	£0	£64,129	£144,515	£0	£0	£569,751	<`%
Other/mixed	£867,647	£1,143,312	£726,083	£883,747	£808,959	£1,174,329	£2,108,566	£923,799	£813,363	£1,037,862	£1,070,831	£909,060	£879,217	£13,346,775	4%
Paying guests	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
SFR	£11,014,112	£14,513,468	£9,217,068	£11,218,493	£10,269,117	£14,907,208	£26,766,629	£11,726,922	£10,325,013	£13,375,435	£13,593,381	£11,539,815	£11,160,987	£169,627,648	32%
2006	£39,073,037	£54,709,392	£22,041,739	£51,425,470	£19,865,385	£41,693,535	£56,209,729	£28,925,242	£51,717,856	£42,902,619	£59,270,947	£21,921,181	£35,377,201	£525,133,333	
2003	£36,142,000	£51,380,000	£21,428,000	£45,313,000	£19,705,000	£40,642,000	£53,283,000	£29,610,000	£45,153,000	£46,409,000	£54,837,000	£24,261,000	£35,001,000	£503,164,000	
% change	8%	6%	3%	13%	1%	3%	5%	-2%	15%	-8%	8%	-10%	1%	4%	

Table8: Overseas staying trip expenditure by accommodation

	Ashford	Canterbury	Dartford	Dover	Gravesham	Maidstone	Medway	Sevenoaks	Shepway	Swale	Thanet	Tonbridge	Tunbridge	Kent	
Serviced	£13,972,510	£8,394,974	£776,251	£9,315,007	£1,752,277	£6,986,255	£6,210,005	£7,762,506	£2,519,348	£1,086,751	£5,744,254	£2,406,377	£5,899,504	72,826,019	23%
Self catering	£1,448,561	£1,386,177	£0	£909,994	£37,143	£687,138	£111,428	£259,998	£1,077,135	£464,282	£854,280	£538,568	£1,077,135	8,851,839	4%
Caravans/tents	168,015	898,564	0	372,527	0	128,231	62,472	32,880	973,240	797,583	287,040	70,692	134,807	3,926,051	2%
Group/campus	£638,410	£23,169,068	£0	£369,721	£0	£98,469	£286,116	£92,895	£0	£104,042	£193,221	£22,295	£50,275	25,024,512	12%
Second homes	£588,761	£1,567,407	£90,193	£1,367,930	£140,300	£496,062	£1,170,006	£378,310	£1,836,433	£957,050	£2,284,893	£360,773	£481,030	11,719,148	5%
Boat moorings	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	0	0%
Other/mixed	£153,276	£240,581	£128,268	£156,121	£142,909	£207,454	£372,494	£163,196	£143,687	£183,346	£189,170	£160,592	£155,320	2,396,414	1%
Paying guests	£0	£7,144,809	£0	£1,169,376	£0	£1,169,376	£1,169,376	£1,169,376	£3,508,127	£0	£14,032,508	£1,169,376	£1,169,376	31,701,700	15%
SFR	£5,290,563	£8,304,024	£4,942,707	£5,388,736	£4,932,709	£7,160,589	£12,857,191	£5,632,957	£4,959,559	£6,328,464	£6,529,500	£5,543,082	£5,361,114	83,231,195	38%
2006	£22,260,098	£51,105,606	£5,937,419	£19,049,411	£7,005,338	£16,933,574	£22,239,086	£15,492,118	£15,017,529	£9,921,518	£30,114,867	£10,271,753	£14,328,561	£239,676,878	
2004	£20,207,000	£49,797,000	£7,307,000	£18,937,000	£7,092,000	£15,921,000	£21,374,000	£13,423,000	£14,637,000	£10,155,000	£29,584,000	£10,153,000	£13,457,000	£232,044,000	
% change	10%	3%	-19%	1%	-1%	6%	4%	15%	3%	-2%	2%	1%	6%	3%	

Table 9: Total staying trip expenditure by accommodation

	Ashford	Canterbury	Dartford	Dover	Gravesham	Maidstone	Medway	Sevenoaks	Shepway	Swale	Thanet	Tonbridge	Tunbridge	Kent	
Serviced	£35,449,201	£29,013,918	£12,839,421	£40,545,986	£10,417,685	£29,140,866	£29,381,376	£22,874,270	£25,690,719	£8,697,086	£43,322,174	£9,685,393	£25,041,072	£322,099,167	39%
Self catering	£4,054,039	£3,457,198	£0	£2,546,768	£103,950	£1,923,070	£311,849	£727,648	£3,014,542	£1,299,371	£2,390,844	£1,507,271	£3,014,542	£24,351,092	3%
Caravans/tents	£2,714,308	£13,121,764	£0	£6,018,221	£0	£2,071,585	£3,168,762	£531,176	£15,722,801	£20,347,489	£4,637,164	£1,142,028	£2,177,821	£71,653,119	9%
Group/campus	£970,028	£26,794,960	£0	£561,770	£0	£149,618	£434,737	£141,149	£0	£158,086	£293,589	£33,876	£76,390	£29,614,203	4%
Second homes	£819,959	£2,080,962	£125,611	£1,905,097	£195,394	£690,859	£1,629,451	£526,867	£2,557,574	£1,332,870	£3,182,138	£502,443	£669,924	£16,219,149	2%
Boat moorings	£0	£0	£0	£80,567	£0	£32,155	£248,385	£0	£0	£64,129	£144,515	£0	£0	£569,751	*<1%*
Other/mixed	£1,020,923	£1,383,893	£854,351	£1,039,868	£951,868	£1,381,783	£2,481,060	£1,086,995	£957,050	£1,221,208	£1,260,001	£1,069,652	£1,034,537	£15,743,189	2%
Paying guests	£0	£7,144,809	£0	£1,169,376	£0	£1,169,376	£1,169,376	£1,169,376	£3,508,127	£0	£14,032,508	£1,169,376	£1,169,376	£31,701,700	5%
SFR	£16,304,675	£22,817,492	£14,159,775	£16,607,229	£15,201,826	£22,067,797	£39,623,820	£17,359,879	£15,284,572	£19,703,899	£20,122,881	£17,082,897	£16,522,101	£252,858,843	36%
2006	£61,333,135	£105,814,998	£27,979,158	£70,474,881	£26,870,723	£58,627,109	£78,448,815	£44,417,360	£66,735,385	£52,824,137	£89,385,814	£32,192,934	£49,705,762	£764,810,211	
2003	£56,349,000	£101,177,000	£28,735,000	£64,250,000	£26,797,000	£56,563,000	£74,657,000	£43,033,000	£59,790,000	£56,564,000	£84,421,000	£34,414,000	£48,458,000	£735,208,000	
% change	9%	5%	-3%	10%	0%	4%	5%	3%	12%	-7%	6%	-6%	3%	4%	

Figure 7: Domestic staying trip spend by purpose

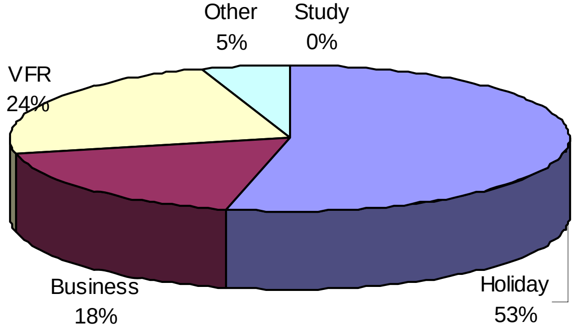

Figure 8: Overseas staying trip spend by purpose

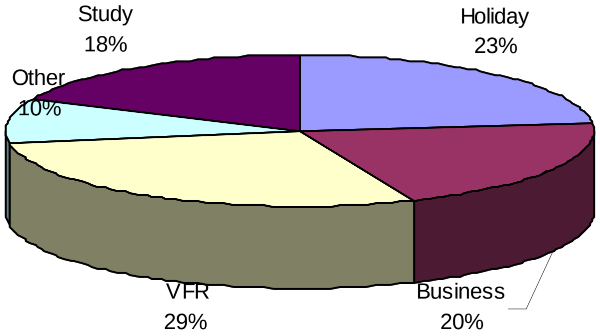

Figure 9: All staying trip spend by purpose

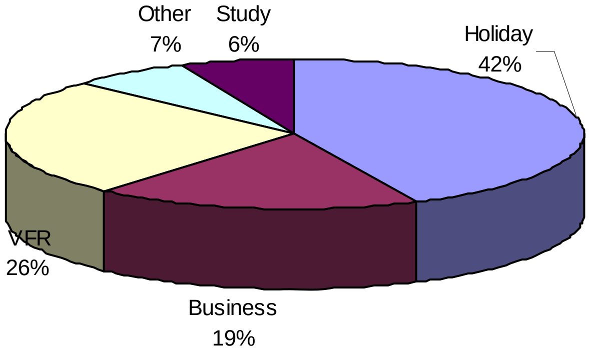

Table 10: Average expenditure per person

	Domestic staying visitor				Overseas staying visitor			
	2006		2003		2006		2003	
	Per night	Per trip	Per night	Per trip	Per night	Per trip	Per night	Per trip
Ashford	£41.51	£121.31	£37.68	£110.21	£45.17	£358.88	£44.55	£359.60
Canterbury	£47.42	£135.20	£40.51	£116.53	£58.89	£278.25	£52.32	£262.46
Dartford	£44.98	£123.83	£41.90	£116.00	£35.98	£269.86	£35.75	£255.60
Dover	£50.62	£143.65	£37.45	£110.40	£53.06	£284.31	£44.91	£295.26
Gravesham	£40.29	£113.51	£38.79	£108.97	£39.58	£259.44	£40.41	£255.43
Maidstone	£45.37	£128.29	£40.97	£116.21	£46.78	£277.61	£43.45	£267.15
Medway	£39.87	£114.25	£31.28	£92.12	£42.00	£274.79	£38.46	£287.03
Sevenoaks	£44.36	£124.14	£36.92	£105.38	£50.30	£271.79	£41.81	£279.47
Shepway	£45.01	£139.03	£42.24	£125.79	£41.95	£306.49	£42.73	£300.80
Swale	£36.05	£119.51	£27.82	£92.58	£38.08	£268.65	£40.14	£278.84
Thanet	£51.54	£143.86	£48.49	£136.12	£42.00	£346.15	£42.61	£338.97
Tonbridge & Malling	£37.66	£110.16	£39.56	£112.91	£40.60	£285.33	£41.00	£270.82
Tunbridge Wells	£46.55	£133.00	£44.81	£125.35	£47.45	£286.58	£41.85	£287.32
Kent	£43.93	£127.80	£38.66	£112.87	£45.22	£301.19	£42.87	£302.06

3.4 Tourism day trip volume and expenditure

Table 11: Number of tourism day trips			
	2006	2003	% change
Ashford	3,309,000	3,052,000	2%
Canterbury	5,839,353	5,588,785	4%
Dartford	8,709,610	8,645,250	1%
Dover	3,257,419	3,401,000	-4%
Gravesham	1,388,713	1,357,000	2%
Maidstone	3,027,003	2,982,000	2%
Medway	3,062,757	3,037,000	1%
Sevenoaks	3,399,711	3,334,000	2%
Shepway	3,297,398	3,157,000	4%
Swale	4,125,926	3,929,594	5%
Thanet	2,277,971	2,259,000	1%
Tonbridge & Malling	2,223,062	2,238,000	-1%
Tunbridge Wells	3,817,219	3,734,444	2%
Kent top range estimate	*47,735,142*	*46,715,073*	*2%*
Kent bottom range estimate	*39,735,142*	*38,715,073*	*3%*

3.5 Total trip volume and associated expenditure

Table 12: Tourism day trip expenditure

	2006	2003	% change
Ashford	£103,075,350	£87,212,000	18%
Canterbury	£198,012,456	£156,357,000	27%
Dartford	£346,032,790	£313,600,000	10%
Dover	£96,647,613	£91,020,000	6%
Gravesham	£44,411,056	£37,332,000	19%
Maidstone	£100,466,227	£86,328,000	16%
Medway	£113,077,006	£105,006,000	8%
Sevenoaks	£110,762,576	£105,141,000	5%
Shepway	£101,296,063	£83,762,000	21%
Swale	£122,993,849	£81,455,000	51%
Thanet	£72,644,507	£69,356,000	5%
Tonbridge & Malling	£71,382,505	£54,142,000	32%
Tunbridge Wells	£134,327,938	£105,472,000	27%
Kent top range estimates	*£1,615,129,936*	*£1,376,183,000*	*17%*
Kent bottom range estimates	*£1,344,637,205*	*£1,140,546,051*	*18%*

Table 13: Average day trip expenditure per person

	2006	2003
Ashford	£31.15	£28.58
Canterbury	£33.91	£27.98
Dartford	£39.73	£36.27
Dover	£29.67	£26.76
Gravesham	£31.98	£27.51
Maidstone	£33.19	£28.95
Medway	£36.92	£34.58
Sevenoaks	£32.58	£31.54
Shepway	£30.72	£26.53
Swale	£29.81	£20.73
Thanet	£31.89	£30.70
Tonbridge & Malling	£32.11	£24.19
Tunbridge Wells	£35.19	£28.24
Kent	£33.84	£29.46

Table 14: Total trip volume and associated expenditure (staying & day)						
	Volume of all trips			Total expenditure associate with all trips		
	2006	2003	% change	2006	2003	% change
Ashford	3,678,455	3,409,000	8%	£164,408,485	£143,561,000	15%
Canterbury	6,435,783	6,168,785	4%	£303,827,454	£257,534,000	18%
Dartford	8,909,757	8,842,250	1%	£374,011,948	£342,335,000	9%
Dover	3,681,754	3,824,000	-4%	£167,122,494	£155,270,000	8%
Gravesham	1,590,537	1,563,000	2%	£71,281,779	£64,129,000	11%
Maidstone	3,413,165	3,366,000	1%	£159,093,336	£142,891,000	11%
Medway	3,618,382	3,610,000	0%	£191,525,821	£179,663,000	7%
Sevenoaks	3,677,942	3,615,000	2%	£155,179,936	£148,174,000	5%
Shepway	3,717,557	3,565,000	4%	£168,031,448	£143,552,000	17%
Swale	4,521,544	4,408,594	3%	£175,817,986	£138,019,000	27%
Thanet	2,776,567	2,756,000	1%	£162,030,321	£153,777,000	5%
Tonbridge & Malling	2,458,038	2,490,000	-1%	£103,575,439	£88,556,000	17%
Tunbridge Wells	4,133,002	4,046,444	2%	£184,033,700	£153,930,000	20%
Kent top range estimates	*52,612,483*	*51,664,073*	*2%*	*£2,379,940,147*	*£2,111,391,000*	*13%*
Kent bottom range estimates	*44,612,483*	*43,664,073*	*2%*	*£2,109,447,416*	*£1,858,531,234*	*14%*

3.6 Breakdown of expenditure associated with trips

Table 15: Breakdown of overnight domestic trip expenditure by business sector

	Accommodation	Retail	Catering	Attractions	Travel	Total
Ashford	£13,243,258	£5,476,488	£8,652,665	£4,406,771	£7,293,855	£39,073,037
Canterbury	£18,542,981	£7,668,084	£12,115,313	£6,170,285	£10,212,730	£54,709,392
Dartford	£7,470,738	£3,089,376	£4,881,110	£2,485,932	£4,114,583	£22,041,739
Dover	£17,429,941	£7,207,808	£11,388,093	£5,799,915	£9,599,712	£51,425,470
Gravesham	£6,733,094	£2,784,338	£4,399,160	£2,240,476	£3,708,318	£19,865,385
Maidstone	£14,131,439	£5,843,778	£9,232,970	£4,702,319	£7,783,029	£41,693,535
Medway	£19,051,499	£7,878,371	£12,447,560	£6,339,498	£10,492,801	£56,209,729
Sevenoaks	£9,803,805	£4,054,170	£6,405,451	£3,262,273	£5,399,542	£28,925,242
Shepway	£17,529,042	£7,248,789	£11,452,841	£5,832,891	£9,654,293	£51,717,856
Swale	£14,541,241	£6,013,243	£9,500,720	£4,838,683	£8,008,732	£42,902,619
Thanet	£20,089,056	£8,307,433	£13,125,462	£6,684,751	£11,064,246	£59,270,947
Tonbridge & Malling	£7,429,877	£3,072,479	£4,854,413	£2,472,335	£4,092,078	£21,921,181
Tunbridge Wells	£11,990,606	£4,958,478	£7,834,228	£3,989,944	£6,603,945	£35,377,201
Kent	£177,986,577	£73,602,835	£116,289,986	£59,226,073	£98,027,863	£525,133,333

Table 16: Breakdown of overnight overseas trip expenditure by business sector						
	Accommodation	Retail	Catering	Attractions	Travel	Total
Ashford	£7,910,702	£5,216,900	£4,798,638	£2,116,426	£2,217,433	£22,260,098
Canterbury	£16,055,148	£14,735,867	£10,841,383	£5,680,040	£4,725,944	£52,038,381
Dartford	£1,526,163	£1,782,773	£1,233,319	£847,061	£548,102	£5,937,419
Dover	£5,908,090	£5,172,914	£4,115,157	£2,017,525	£1,835,726	£19,049,411
Gravesham	£1,784,839	£2,055,687	£1,595,320	£853,482	£716,010	£7,005,338
Maidstone	£5,190,883	£4,492,703	£3,632,996	£1,965,088	£1,651,904	£16,933,574
Medway	£5,695,265	£6,666,130	£4,972,054	£2,721,532	£2,202,899	£22,257,880
Sevenoaks	£4,886,962	£4,056,858	£3,301,963	£1,746,863	£1,499,471	£15,492,118
Shepway	£4,196,997	£4,442,621	£3,042,324	£2,002,146	£1,333,441	£15,017,529
Swale	£2,589,403	£2,901,348	£2,260,928	£1,176,144	£1,012,181	£9,940,004
Thanet	£8,339,750	£9,231,810	£5,500,561	£4,676,567	£2,366,178	£30,114,867
Tonbridge & Malling	£2,735,043	£3,011,833	£2,215,567	£1,321,878	£987,432	£10,271,753
Tunbridge Wells	£3,976,356	£4,211,407	£3,129,695	£1,637,503	£1,373,601	£14,328,561
Kent	£70,795,601	£67,978,848	£50,639,905	£28,762,256	£22,470,322	£289,381,281
%	30%	28%	21%	12%	9%	100%

Table 17: Breakdown of tourism day trip expenditure by business sector

	Retail	Catering	Attractions	Travel	Total
Ashford	£46,486,983	£36,282,523	£9,998,309	£10,307,535	£103,075,350
Canterbury	£71,413,906	£76,757,327	£21,305,255	£28,535,969	£198,012,456
Dartford	£154,746,453	£122,120,306	£33,565,181	£35,600,850	£346,032,790
Dover	£25,981,819	£41,376,341	£11,753,905	£17,535,549	£96,647,613
Gravesham	£17,258,507	£16,301,895	£4,308,944	£6,541,710	£44,411,056
Maidstone	£36,152,342	£37,571,238	£9,745,224	£16,997,423	£100,466,227
Medway	£47,102,131	£40,741,974	£10,968,470	£14,264,432	£113,077,006
Sevenoaks	£38,720,076	£41,695,865	£10,743,970	£19,602,666	£110,762,576
Shepway	£25,839,544	£44,073,953	£12,603,574	£18,778,991	£101,296,063
Swale	£22,234,919	59319229	17118895	24320806	£122,993,849
Thanet	£18,416,718	£32,654,510	£9,817,655	£11,755,624	£72,644,507
Tonbridge & Malling	£25,076,749	£26,841,833	£6,924,103	£12,539,821	£71,382,505
Tunbridge Wells	£51,929,488	£49,368,728	£13,029,810	£19,999,912	£134,327,938
Kent top range estimate	*£581,359,635*	*£625,105,722*	*£171,883,295*	*£236,781,288*	*£1,615,129,936*
%	*36%*	*38%*	*11%*	*15%*	*100%*
Kent bottom range estimate	*£495,425,880*	*£522,949,540*	*£151,380,130*	*£206,427,450*	*£1,376,183,000*
%	*36%*	*38%*	*11%*	*15%*	*100%*

3.7 Additional expenditure associated with tourism activity

18: Additional tourism related expenditure

	Second homes	Boats	Friends and relatives	Total 2006	Total 2003	% change	**Total expenditure (2006) associated with trips including this 'additional' expenditure'**
Ashford	£176,000	£0	£8,431,000	£8,607,000	£8,283,000	4%	**£173,015,485**
Canterbury	£392,000	£0	£11,142,000	£11,534,000	£10,972,000	5%	**£315,361,454**
Dartford	£27,000	£0	£7,056,000	£8,083,000	8,289,000	-2%	**£382,094,948**
Dover	£410,000	£892,000	£8,588,000	£9,890,000	9,482,000	4%	**£177,012,494**
Gravesham	£42,000	£0	£7,861,000	£7,903,000	7,661,000	3%	**£79,184,779**
Maidstone	£149,000	£356,000	£11,412,000	£11,917,000	11,534,000	3%	**£171,010,336**
Medway	£350,000	£2,750,000	£20,490,000	£23,590,000	22,746,000	4%	**£215,115,821**
Sevenoaks	£113,000	£0	£8,977,000	£9,090,000	8,795,000	3%	**£164,269,936**
Shepway	£550,000	£0	£7,904,000	£8,454,000	8,143,000	4%	**£176,485,448**
Swale	£287,000	£710,000	£10,086,000	£11,083,000	10,635,000	4%	**£186,900,986**
Thanet	£684,000	£1,600,000	£10,406,000	£12,690,000	12,285,000	3%	**£174,720,321**
Tonbridge & Malling	£108,000	£0	£8,834,000	£8,942,000	8,556,000	5%	**£112,517,439**
Tunbridge Wells	£144,000	£0	£8,544,000	£8,688,000	8,284,000	5%	**£192,721,700**
Kent	£3,432,000	£6,308,000	£129,731,000	£140,471,000	£135,665,000	4%	**£2,520,411,147**

3.8 Total business turnover supported

Table 19a: DIRECT business turnover supported by total trip and additional expenditure		
	Total expenditure (2006) associated with trips including this 'additional' expenditure'	Of which translate to DIRECT turnover for local businesses 2006
Ashford	£173,015,485	£135,794,000
Canterbury	£315,361,454	£298,905,000
Dartford	£382,094,948	£364,990,000
Dover	£177,012,494	£165,423,000
Gravesham	£79,184,779	£74,800,000
Maidstone	£171,010,336	£160,436,000
Medway	£215,115,821	£204,351,000
Sevenoaks	£164,269,936	£153,669,000
Shepway	£176,485,448	£164,578,000
Swale	£186,900,986	£173,724,930
Thanet	£174,720,321	£164,645,000
Tonbridge & Malling	£112,517,439	£105,470,000
Tunbridge Wells	£192,721,700	£181,531,000
Kent top range estimate	*£2,520,411,147*	*£2,348,316,930*
Kent bottom range estimate	*£2,249,918,416*	*£2,085,035,242*

Table 19b: TOTAL business turnover supported by total trip and additional expenditure					
	Direct turnover generated	Supplier and income induced turnover generated	Total turnover generated in 2006	Total turnover generated in 2003	% change
Ashford	£135,794,000	£44,235,000	£180,029,000	£172,020,000	5%
Canterbury	£298,905,000	£59,781,000	£358,686,000	£333,657,500	8%
Dartford	£364,990,000	£72,998,000	£437,988,000	£406,105,000	8%
Dover	£165,423,000	£33,084,600	£198,507,600	£186,594,000	6%
Gravesham	£74,800,000	£22,440,000	£97,240,000	£93,090,000	4%
Maidstone	£160,436,000	£48,130,800	£208,566,800	£197,291,000	6%
Medway	£204,351,000	£61,305,300	£265,656,300	£253,518,000	5%
Sevenoaks	£153,669,000	£46,100,700	£199,769,700	£194,733,000	3%
Shepway	£164,578,000	£32,915,600	£197,493,600	£191,012,000	3%
Swale	£173,724,930	£17,372,493	£191,097,423	£188,301,000	1%
Thanet	£164,645,000	£32,929,000	£197,574,000	£195,984,000	1%
Tonbridge & Malling	£105,470,000	£31,641,000	£138,111,000	£136,592,500	1%
Tunbridge Wells	£181,531,000	£18,153,100	£199,684,100	£194,792,000	3%
Kent top range estimate	*£2,348,316,930*	*£521,086,593*	*£2,869,403,523*	*£2,743,690,000*	*5%*
Kent bottom range estimate	*£2,085,035,242*	*£417,007,048*	*£2,502,042,290*	*£1,760,111,246*[6]	

[6] *Not directly comparable as the final turnover figure generated for the 2003 bottom range estimate was based on local day trip expenditure and not the national averages drawn from GBDVS.*

3.9 Employment supported by tourism spending

Table 20a: FTE employment supported by visitor expenditure				
	FTE	Actual 2006	Actual 2003	% change
Ashford	2,543	3,479	3,251	7%
Canterbury	5,393	7,376	7,025	5%
Dartford	6,351	8,687	7,970	9%
Dover	3,036	4,152	4,031	3%
Gravesham	1,352	1,849	1,813	2%
Maidstone	3,476	4,754	4,571	4%
Medway	3,859	5,279	5,175	2%
Sevenoaks	2,944	4,027	3,872	4%
Shepway	2,844	3,890	3,670	6%
Swale	2,832	3,873	3,760	3%
Thanet	3,440	4,705	4,481	5%
Tonbridge & Malling	2,095	2,865	2,837	1%
Tunbridge Wells	2,879	3,938	3,715	6%
Kent top range estimate	*43,043*	*58,874*	*56,171*	*5%*
Kent bottom range estimate	*37,532*	*50,669*	*35,314*[7]	

[7] *Not directly comparable given explanation in footnote 6.*

Table 20c: Tourism supported jobs as a proportion of local employment

	Total employment	Tourism employment	Tourism proportion
Ashford	50,000	3,479	7%
Canterbury	57,000	7,376	13%
Dartford	42,000	8,687	21%
Dover	47,000	4,152	10%
Gravesham	43,000	1,849	4%
Maidstone	67,000	4,754	7%
Medway	121,000	5,279	8%
Sevenoaks	50,000	4,027	6%
Shepway	43,000	3,890	6%
Swale	55,000	3,873	6%
Thanet	46,000	4,705	7%
Tonbridge & Malling	53,000	2,865	4%
Tunbridge Wells	47,000	3,938	6%
Kent top range estimate	*721,000*	*58,874*	*8%*
Kent bottom range estimate	*721,000*	*50,669*	*7%*

Glossary of terms

Overnight trips
Overnight trips comprise a visit which involves a stay away from home of at least one night. The study measures trips, rather than visitors as one visitor may make multiple trips to an area in a given period.

Tourism day trips
It should be noted that with the Leisure Day Visits Survey, the definition of tourism day trip changed in 2002 from trips defined as lasting at least three hours or more and involving travel of over 20 miles to trips lasting three hours or more and which are not taken on a regular basis. It is difficult to gage what implication this change in definition has on total volume and whether comparisons with previous estimates are valid.

VFR Trips
VFR trips are defined as a visit where the main purpose is visiting friends and relatives. Whilst many trips to visit friends and relatives will be accommodated in the homes of these friends/ relatives, some will make use of other forms of accommodation. It should be also noted that other forms of trip, for instance for holiday or business purposes may stay with friends and relatives rather than in commercial accommodation.

Additional trip-related expenditure
Apart from the spending associated with the individual trips, additional ongoing expenditure will take place on accommodation in the case of visitors overnight at second homes or private boats, or/and additional spending by non visitors e.g. friends and relatives with whom the visitor is visiting and/or overnight with will also take place, e.g. taking visitors out for a meal.

Economic multiplier
Multipliers are used to estimate the economic impact of visitor expenditure. Visitor expenditure produces three effects. Direct effects are changes in the business sector directly receiving visitor expenditure. For instance, visitors overnight in a hotel will directly increase revenue and the number of jobs in the hotel sector. Indirect effects are the changes in supplier businesses. For example, these indirect effects would be hotels purchasing more linen from local suppliers as a result of increased business. Induced effects are changes in local economic activity resulting from household spending. For instance, employees of the hotel and linen supplier spend their wages in the local area, resulting in more sales, income and jobs in the area.

Full Time Equivalent Jobs (FTE)
For the purposes of the Model, a FTE is defined by the average annual salary plus employment costs in the sector concerned.

Direct jobs
Jobs directly generated in those local businesses in which visitors spend money, i.e. hotels, catering establishments.

Indirect jobs
Jobs created locally due to the purchases of goods and services by businesses benefiting from visitor expenditure, i.e. jobs with local suppliers.

Induced jobs
Jobs created throughout the local economy because employees employed due to visitor expenditure spend their wages locally on goods and services such as food, clothing and housing.

Actual Jobs
Many jobs are seasonal or part-time in their nature in the tourism sector, so an adjustment is made to calculate the actual number of jobs from the number of FTEs. The adjustment made is based on the findings of surveys of tourism related businesses, and national employment surveys.

United Kingdom Tourism Survey (UKTS)
The United Kingdom Tourism Survey is undertaken by BRMB for VisitBritain and is based on 1,000 telephone interviews per week (50,000 annually). It provides basic headline data on the volume and value of domestic tourism at a national, regional and county level.

International Passenger Survey (IPS)
The International Passenger Survey is conducted by Office for National Statistics and is based on face-to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland. Around 210,000 interviews are undertaken each year. IPS provides headline figures, based on the county or unitary authority, for the volume and value of overseas trips to the UK.

England Day Visits Survey (EDVS)
The leisure day visits survey was last conducted in 2005 and covered approximately 5,000 respondent interviews. Unlike the IPS and UKTS, this survey is not undertaken on an ongoing basis and thus adjustments are made in the model to account for annual increments in the value and volume based on trends observed in 2005.

United Kingdom Occupancy Survey (UKOS)
As part of the EU Directive on Tourism Statistics adopted in 1995, the UK must report regularly on a specified range of statistics to Eurostat, the official statistical office of the European Union. Included in these statistics are monthly

occupancy rates for UK serviced accommodation. The responsibility for providing this data lies with the four National Tourist Boards, and across England the survey is undertaken by the Regional Tourist Boards. A sample of establishments are recruited to the survey and asked to complete a data form each month, giving details of their nightly occupancy. The data form is processed and analysed to produce monthly occupancy rates for the whole of the area and for specific categories of type, size, location etc.

New Earnings Survey (NES)
The New Earnings Survey provides information on wage levels by industry sector and occupation. The main strength of the NES is its large sample size. It is based on a 1% sample of employees who are members of PAYE. The coverage of full-time adult employees is virtually complete, and consequently the survey is representative of hours worked for full-time employees on adult rates of pay (although the survey is currently not weighted). The coverage of part-time employees is not comprehensive, as some part-time workers will have earnings below the income tax threshold. The NES is the best source for estimating full time earnings and the 2001 edition has been used.

Labour Force Survey (LFS)
The LFS is a household panel survey, continuous since 1992, with results produced each quarter. It has a sample of approximately 60,000 households. The LFS is the government's largest continuous household survey and participation in the survey is voluntary. LFS data is weighted to enable the population estimates to be produced. The weighting also attempts to compensate for differential non-response among different subgroups in the population. LFS is designed to provide information on the UK labour market that can be used to develop, manage and evaluate labour market policies.