

# COOL Activity 1.2

## Economic Impact Research

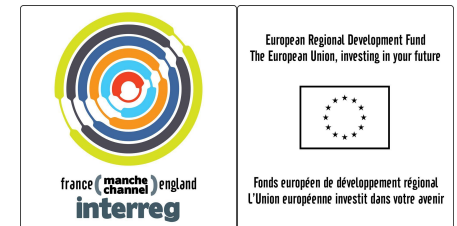


### The Economic Impact of the Kent Visitor Economy 2013

#### Shepway district

Produced on behalf of the COOL programme partners  
by  
The South West Research Company Ltd.

February 2015



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# Introduction

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This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in Shepway district in 2013.

The figures were derived using the Cambridge Economic Impact Model undertaken by Tourism South East (TSE) and the report compiled by The South West Research Company (TSWRC). The model utilises information from national tourism surveys and regionally/locally based data. 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.

In 2013, British residents took 102 million overnight trips in England, totalling 297 million nights away from home, with expenditure of £18.7 billion. £184 was spent per trip, and with an average trip length of 2.9 nights, the average spend per night was £63. The number of domestic trips was -3% lower than in 2012 and the amount spent fell by -4% (in nominal terms). At a regional level domestic trips in the South East remained at a similar level to 2012, domestic visitor nights increased by 2% although domestic visitor spend decreased by -10%.

In 2013, a record 32.8 million overseas visitors came to the UK in 2013 spent a record £21.0 billion. These figures represent a 5.6% increase in volume and 12.7% (nominal) increase in value compared with 2012. At a regional level overseas trips in the South East increased by 6% compared to 2012, overseas visitor nights increased by 3% and overseas visitor spend increased by 5%.

GB residents took a total of 1,588 million Tourism Day Visits with around £54 billion being spent during these trips in GB. The 1,588 million Tourism Day Visits that were taken during 2013 represented a decline of 7% when compared to 2012 (1,712 million Tourism Day Visits). The value of visits also fell year on year, showing a decrease of 5% from £57.1 billion in 2012 to £53.9 billion in 2013. Declines were seen across each of the GB nations when comparing the volume of Tourism Day Visits taken in 2013 to those taken in 2012. England saw a decline of -7% in line with the GB total, while Scotland and Wales saw larger decreases (-13% and -12% respectively). At a regional level day visits in the South East decreased by -11% whilst day visitor spend decreased by -6%.

For further information on the Cambridge Model and the terms used in this report please see Appendix 1 which accompanies this report.

For a full overview of 2013, including key facts about the economy, weather and key events please see Appendix 2 of this report.

# Value of Tourism 2013

## Shepway

Key Facts	
440,000	Staying visitor trips
1,341,000	Staying visitor nights
£75,550,000	Staying visitor spend
3,980,000	Day visits
£122,067,000	Day visitor spend
£197,617,000	Direct visitor spend
£10,330,000	Other related spend
£207,947,000	TOTAL VISITOR RELATED SPEND
£198,000,000	*ADJUSTED VISITOR RELATED SPEND
£37,198,000	Supplier and income induced spend
<b>£235,213,000</b>	<b>TOTAL VALUE OF TOURISM</b>
4,509	Estimated actual employment
3,186	FTE employment
12%	Proportion of all employment

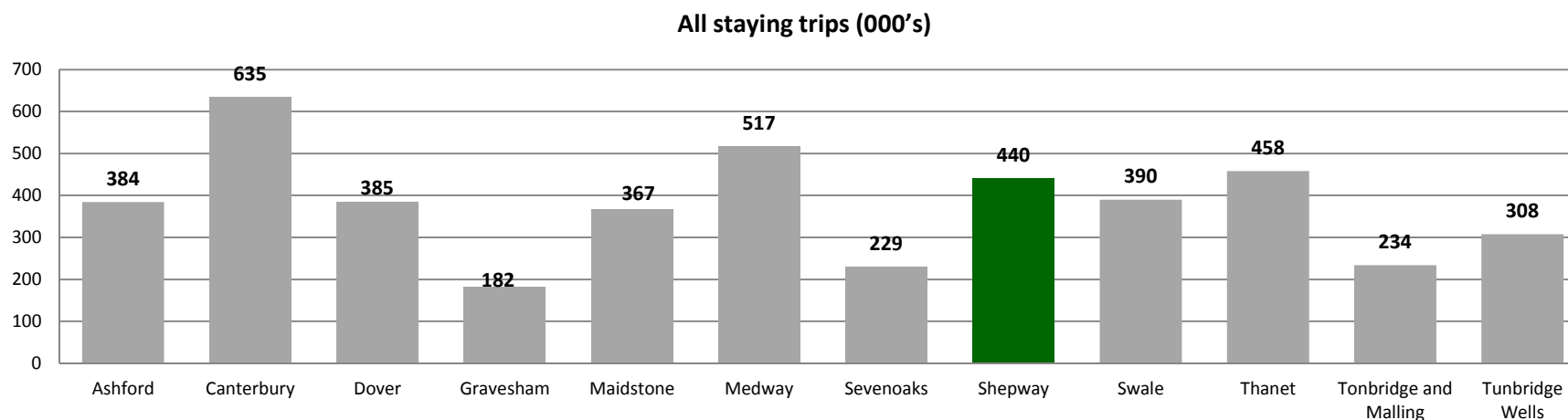
\* It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

## Shepway – 2013 v 2012 comparisons

Visitors	2013	2012	% Change
<u>Staying visitors</u>			
UK Trips	374,000	371,000	1%
UK Nights	975,000	1,159,000	-16%
UK Spend	£57,055,000	£54,637,000	4%
Overseas Trips	66,000	60,000	10%
Overseas Nights	366,000	352,000	4%
Overseas Spend	£18,495,000	£18,766,000	-1%
<u>Day visitors</u>			
Day Visits	3,980,000	3,960,000	1%
Day Visit Spend	£122,067,000	£111,900,000	9%

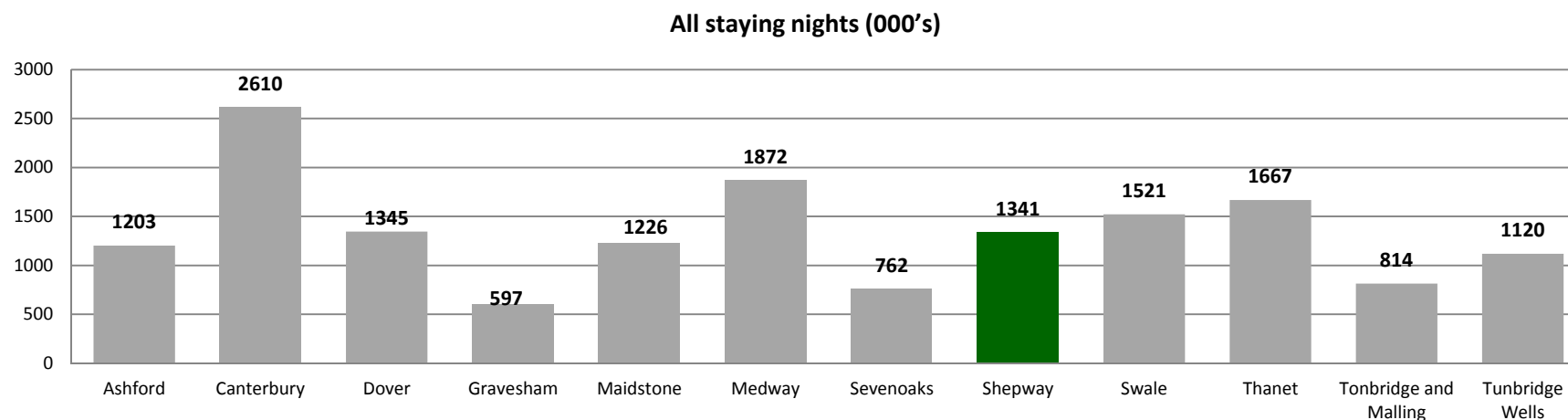
Visit characteristics	2013	2012	% Change
UK Average length of stay	2.61	3.12	-17%
UK Spend per trip	£152.55	£147.27	4%
UK Spend per night	£58.52	£47.14	24%
Overseas Average length of stay	5.55	5.87	-5%
Overseas Spend per trip	£280.23	£312.77	-10%
Overseas Spend per night	£50.53	£53.31	-5%
Day visit spend per visit	£30.67	£28.26	9%

## Shepway - Staying trips in the county context



Area	Domestic trips (000's)	Overseas trips (000's)
Ashford	283	101
Canterbury	466	169
Dover	311	74
Gravesham	147	35
Maidstone	291	76
Medway	425	92
Sevenoaks	170	59
Shepway	374	66
Swale	351	39
Thanet	340	118
Tonbridge and Malling	191	43
Tunbridge Wells	250	58

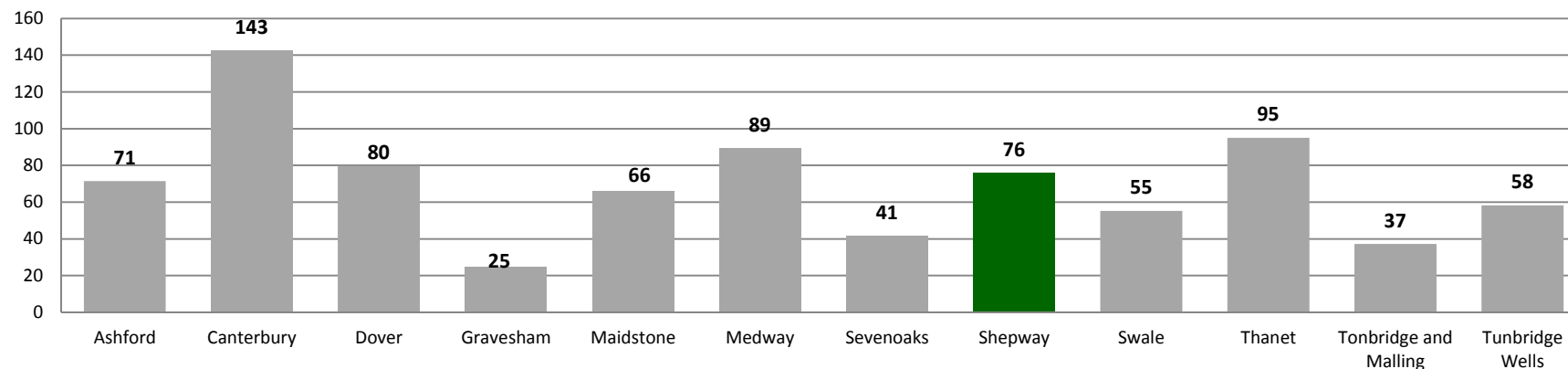
## Shepway - Staying nights in the county context



Area	Domestic nights (000's)	Overseas nights (000's)
Ashford	770	433
Canterbury	1,439	1,171
Dover	942	403
Gravesham	398	199
Maidstone	780	446
Medway	1,290	582
Sevenoaks	455	307
Shepway	975	366
Swale	1,251	270
Thanet	998	669
Tonbridge and Malling	553	261
Tunbridge Wells	750	370

## Shepway - Staying spend in the county context

All staying spend (£mn)



Area	Domestic spend (millions)	Overseas spend (millions)
Ashford	£44	£27
Canterbury	£76	£66
Dover	£57	£23
Gravesham	£16	£8
Maidstone	£39	£26
Medway	£61	£28
Sevenoaks	£24	£18
Shepway	<b>£57</b>	<b>£18</b>
Swale	£44	£11
Thanet	£54	£41
Tonbridge and Malling	£25	£12
Tunbridge Wells	£39	£19



## Shepway - Staying visits by accommodation type

Domestic tourists	Trips	Nights	Spend
Serviced	158,000	365,000	£39,774,000
Self catering	6,000	31,000	£1,662,000
Touring caravans /tents	47,000	130,000	£3,347,000
Static vans/holiday centres	49,000	120,000	£3,182,000
Group/campus	0	0	£0
Second homes	10,000	36,000	£641,000
Boat moorings	0	0	£0
Other	4,000	28,000	£1,554,000
Paying guests in private houses	0	0	£0
Staying with friends and relatives	99,000	264,000	£6,894,000
<b>Total</b>	<b>374,000</b>	<b>975,000</b>	<b>£57,055,000</b>

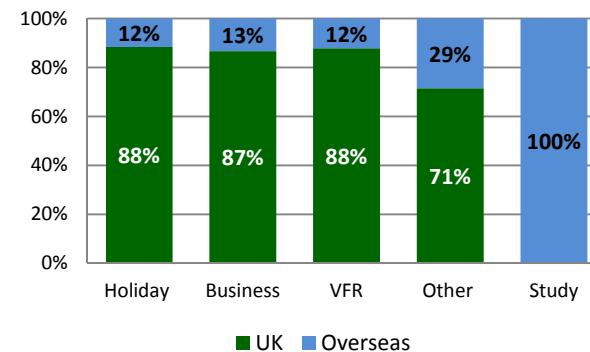
Overseas tourists	Trips	Nights	Spend
Serviced	15,000	38,000	£4,525,000
Self catering	4,000	29,000	£1,171,000
Touring caravans /tents	8,000	36,000	£1,576,000
Static vans/holiday centres	4,000	19,000	£881,000
Group/campus	0	0	£0
Second homes	2,000	24,000	£908,000
Boat moorings	0	0	£0
Other	6,000	9,000	£219,000
Paying guests in private houses	8,000	50,000	£3,416,000
Staying with friends and relatives	19,000	160,000	£5,798,000
<b>Total</b>	<b>66,000</b>	<b>366,000</b>	<b>£18,495,000</b>

# Shepway - Staying visits by purpose

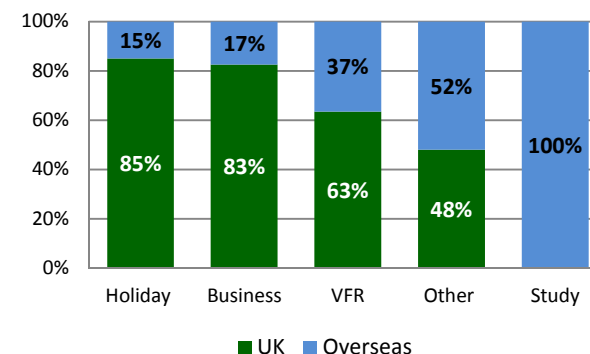
Domestic tourists	Trips	Nights	Spend
Holiday	258,000	749,000	£31,861,000
Business	26,000	71,000	£17,132,000
Visits to friends and relatives	86,000	144,000	£7,633,000
Other	5,000	12,000	£428,000
Study	0	0	£0
<b>Total</b>	<b>374,000</b>	<b>975,000</b>	<b>£57,055,000</b>

Overseas tourists	Trips	Nights	Spend
Holiday	34,000	132,000	£7,766,000
Business	4,000	15,000	£896,000
Visits to friends and relatives	12,000	83,000	£3,606,000
Other	2,000	13,000	£1,006,000
Study	13,000	123,000	£5,221,000
<b>Total</b>	<b>66,000</b>	<b>366,000</b>	<b>£18,495,000</b>

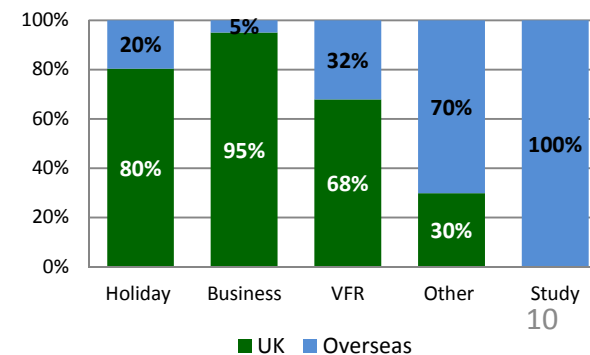
Trips



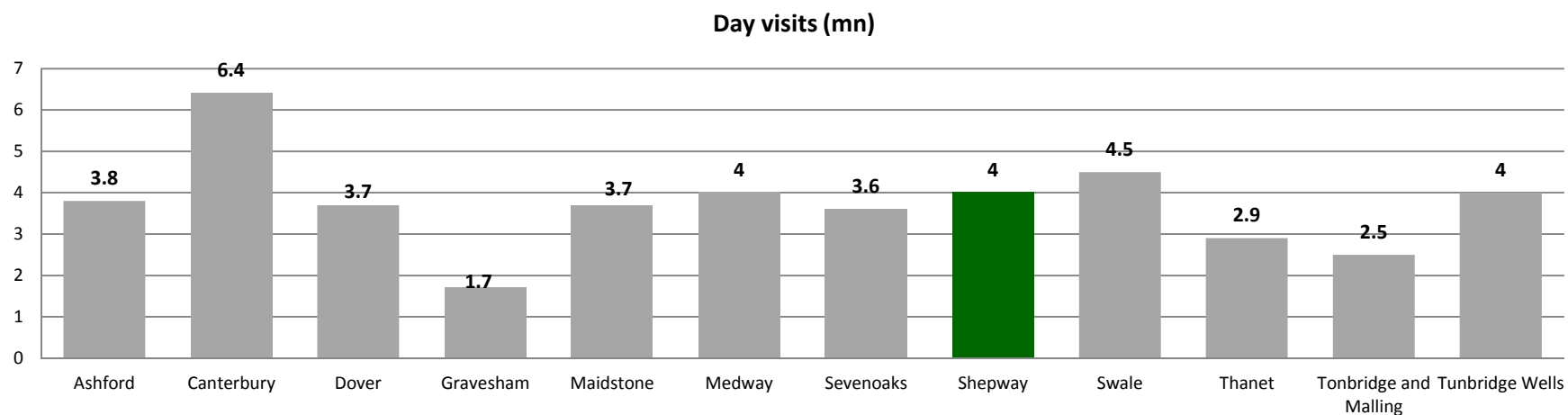
Nights



Spend

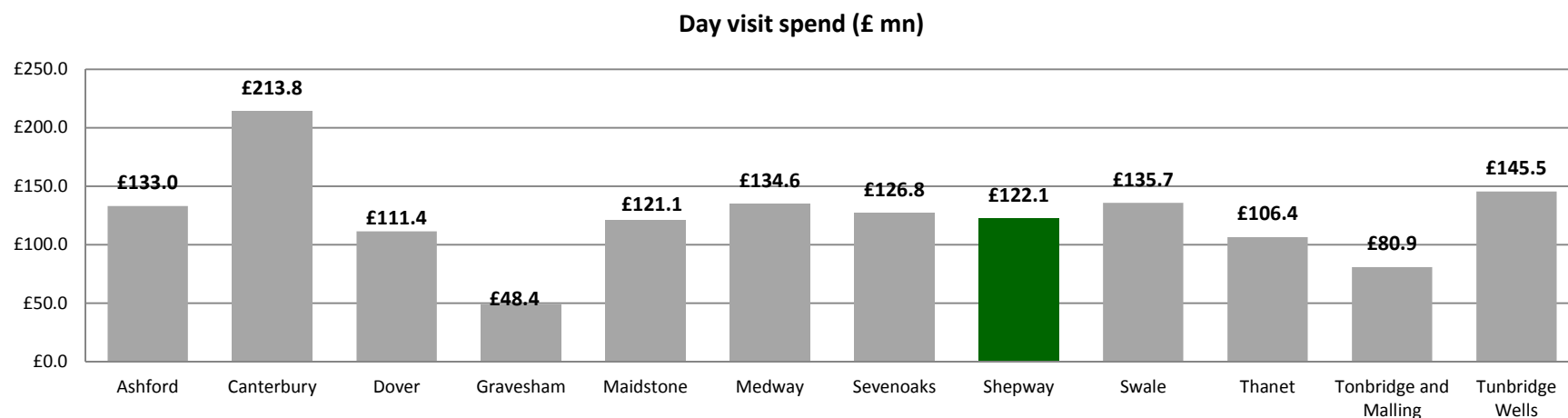


## Shepway – Day visits in the county context



Area	Day visits (mn)
Ashford	3.8
Canterbury	6.4
Dover	3.7
Gravesham	1.7
Maidstone	3.7
Medway	4.0
Sevenoaks	3.6
Shepway	4.0
Swale	4.5
Thanet	2.9
Tonbridge and Malling	2.5
Tunbridge Wells	4.0

## Shepway – Day visit spend in the county context



Area	Day visit spend (£mn)
Ashford	£133.0
Canterbury	£213.8
Dover	£111.4
Gravesham	£48.4
Maidstone	£121.1
Medway	£134.6
Sevenoaks	£126.8
Shepway	£122.1
Swale	£135.7
Thanet	£106.4
Tonbridge and Malling	£80.9
Tunbridge Wells	£145.5

## Shepway – Direct visitor expenditure by category



### Accommodation

- UK staying visitors £20,957,000
- Overseas staying visitors £5,284,000



### Shopping

- UK staying visitors £6,967,000
- Overseas staying visitors £5,525,000
- Day visitors £55,052,000



### Food & drink

- UK staying visitors £12,340,000
- Overseas staying visitors £3,707,000
- Day visitors £42,967,000



### Attractions/entertainment

- UK staying visitors £5,736,000
- Overseas staying visitors £2,378,000
- Day visitors £11,840,000



### Travel

- UK staying visitors £11,054,000
- Overseas staying visitors £1,601,000
- Day visitors £12,207,000

## Shepway – Other visitor related expenditure by category



Second Homes  
£550,000



Boats  
£0



Static Vans  
£0



Visiting friends and relatives (non-visitor spend)  
£9,780,000

- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings.
- Spend on boats estimates cover 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.
- Additional spending is incurred by friends and relatives as a result of people coming to stay with them.

# Shepway – Tourism related employment

## Estimated actual employment



## Full time equivalent employment (FTE's)



Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	484	16	500
Retailing	128	562	690
Catering	269	721	990
Attractions/entertainment	97	148	245
Transport	69	66	135
Arising from non trip spend	159	0	159
<b>Total Direct</b>	<b>1,206</b>	<b>1,513</b>	<b>2,718</b>