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Commissioned by:

Visit Kent

Economic Impact of Tourism

Kent - 2017 Results

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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 2017 and provides comparative data against the previously published data for Kent (2015).

Destination Research was commissioned by Visit Kent to produce 2017 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 district (e.g. local attractions data, boat moorings, language schools in the area, accommodation stock, etc.). See Appendix I for further details.

Contextual analysis

Domestic tourism

In 2017, British residents took 100.6 million overnight trips in England, totalling 299 million nights away from home, with an expenditure of £19.05 billion. £189.31 was spent per trip, and with an average trip length of 2.97 nights, the average spend per night was £63.62. The number of domestic trips was 2% up on 2015, and the amount spent was also up by 2%.

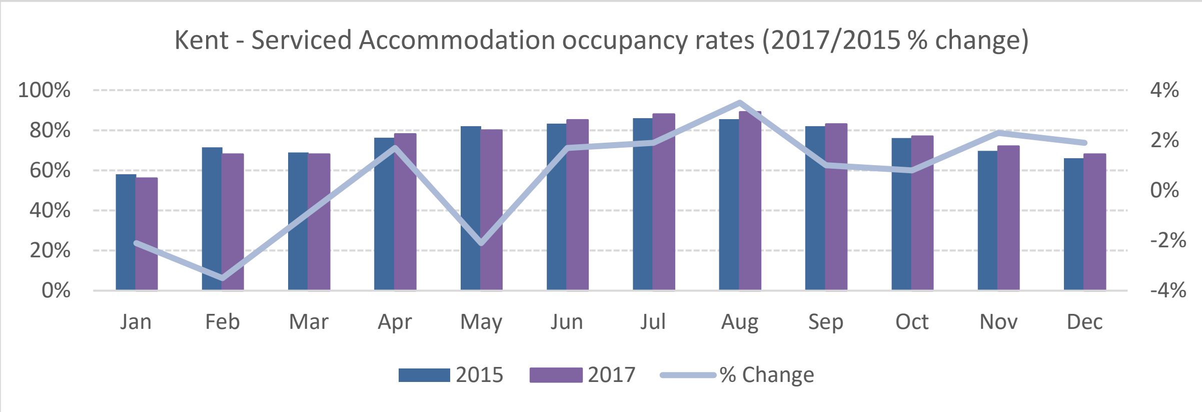
The South East region experienced a 1% increase in overnight trips between 2015 and 2017. Bednights were up 2% on 2015 and expenditure was up by 3%. The region received slightly more visitors in 2017 than in 2015 and visitors spent slightly more per night than in 2015. The average spend per night was up from £56.53 per night in 2015 to £59.01 in 2017.

Domestic visits to Kent

The domestic tourism results for Kent used in this model combine a mixture of supply and demand data. We do this because extracting county level data from national surveys can sometimes lead to inaccurate results due to low sample sizes. According to the GB Tourism Survey (demand side), Kent experienced a 1% decrease in the volume of trips between 2015 and 2017. Nights were down 2% and expenditure was also down by 1%.

In 2017, serviced accommodation providers saw an average occupancy of 76%, compared to the 75.5% witnessed in 2015, an increase of 0.5%. By combining the supply and demand results we estimate that trips to Kent were down by a marginal rate of 0.3%, nights per trip were up by 1.9% and expenditure increased by 2.9%.

Please note that the Cambridge Model uses three year rolling averages to reduce some of the more extreme fluctuations which are due to small sample sizes and high margins or error.



Visits from overseas

As with domestic tourism, the Cambridge Model uses three year averages to estimate changes in overseas tourism to reduce some of the more extreme fluctuations which can be attributed to small sample sizes and high margins or error. At national level, the number of visits in 2017 grew by 10% reaching 33 million. The number of visitor nights spent in the UK increased by 7% between 2015 and 2017 to reach 245.7 million, with the average number of nights per visit standing at 7.4.

Overseas trips to the South England region were 9% up on 2015 to reach 5.2 million overnight trips. The total number of nights was up by 8% to reach 37.4 million in 2017. Spend was unchanged from the levels achieved in 2015.

Kent also experienced growth between 2015 and 2017. Trips were up 4%, nights per trip went up 11% and expenditure was also up by 4%.

The International Passenger Survey (IPS) 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. The number of interviews conducted in England in 2017 was around 35,628.

Day visitors

During 2017, GB residents took a total of 1.5 billion tourism day trip to destinations in England. Around £51 billion was spent during these trips. At national level, the volume of day trips was down by 1% and the expenditure levels were unchanged between 2015 and 2017.

The volume and value of tourism day visits in the South East of England increased by 4% between 2015 and 2017, from 221 million to 230 million. Expenditure levels were up by 5% to £7.4 billion in 2017.

The results for Kent are based on a combination of results from the GB Day Visitor Survey, admissions data from the Visits to Visitor Attractions Survey, the ALVA (Association of Leading Visitor Attractions) Survey and attractions visitor numbers from the Visit Kent Business Barometer.

The GB Day Visitor Survey shows a 15% increase in volume of trips to Kent between 2015 and 2017 and a 20% increase in value for the same period. However, data from the Visits to Visitor Attractions Survey looking at attractions based in Kent shows that the admissions to attractions were up by 5% between 2015 and 2017 and admission charges were also up by 5%. Results from the Visit Kent Business Barometer report an increase of 4% in visitor numbers for the same period.

Based on these results the model assumes that the volume of day trips was up 8% between 2015 and 2017 and expenditure up by 9%.

Economic Impact of Tourism – Headline Figures   Kent - 2017 Results

Total number of trips (day & staying)
64,970,000

Total staying trips
4,870,000

Total day trips
60,100,000

Total staying nights
17,881,000

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

Total staying spend
£928,856,000

Associated spend
£263,559,000

Total day trip spend
£2,036,732,000

Total visitor spend
£3,090,610,000

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

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

Indirect / induced spend
£774,317,000

Total Tourism Value
£3,864,927,000

Full time equivalent jobs
55,583

Total actual tourism related employment
76,852

Is it estimated that 6,023 actual jobs are supported by Bluewater, raising the total employment in that area to 9,765, or 16% of all employment in Dartford.

Percentage of all employment
11%

Economic Impact of Tourism – Year on year comparisons **Kent**

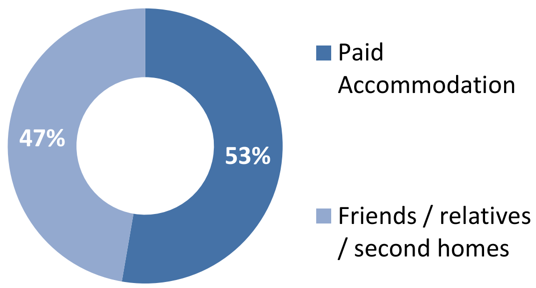
Day Trips	**2015**	**2017**	**Annual variation**
Day trips Volume	55,748,000	60,100,000	7.8%
Day trips Value	£1,874,185,000	£2,036,732,000	8.7%
Overnight trips			
Number of trips	4,885,000	4,870,000	-0.3%
Number of nights	17,476,000	17,881,000	2.3%
Trip value	£901,021,000	£928,856,000	3.1%
Total Value	£3,610,353,400	£3,864,927,000	7.1%
Actual Jobs	71,920	76,852	6.9%

Kent	**2015**	**2017**	**Variation**
Average length stay (nights x trip)	3.58	3.67	2.6%
Spend x overnight trip	£ 184.45	£ 190.73	3.4%
Spend x night	£ 51.56	£ 51.95	0.8%
Spend x day trip	£ 33.62	£ 33.89	0.8%

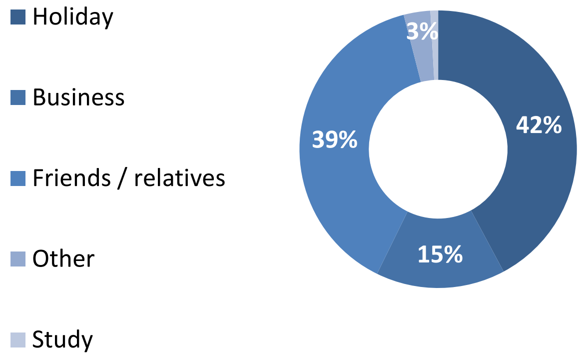
Economic Impact of Tourism – Headline Figures

Kent - 2017 Results

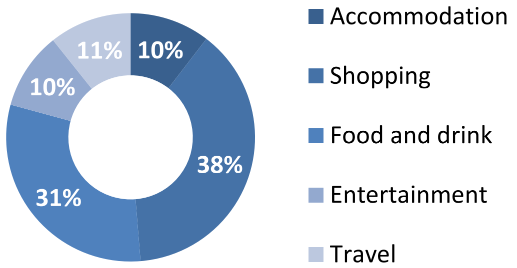
Trips by type of accommodation



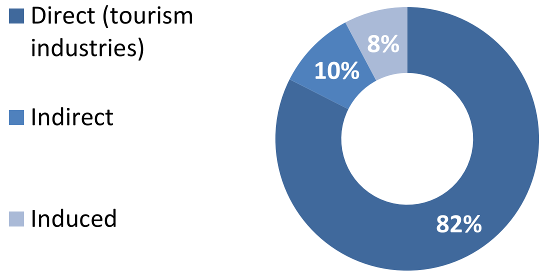
Trips by purpose



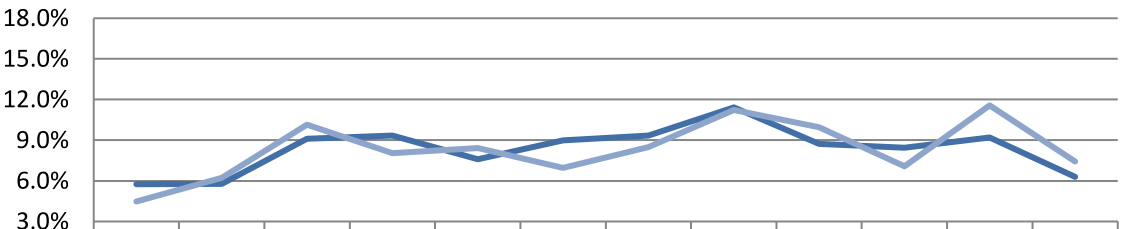
Breakdown of expenditure



Type of employment

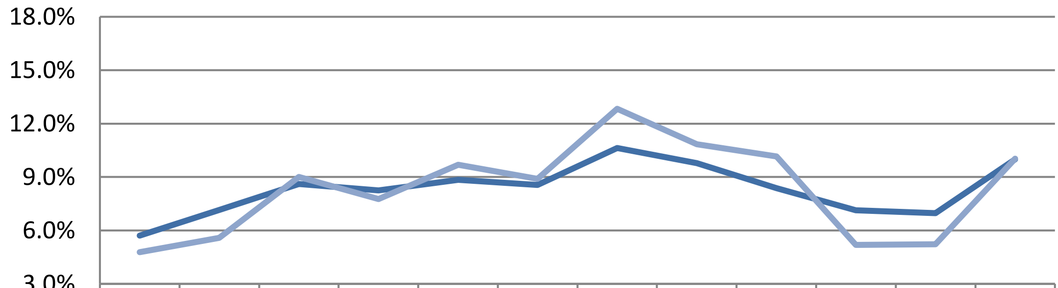


Seasonality - Day visitors (County level)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day trips	5.8%	5.8%	9.1%	9.3%	7.6%	9.0%	9.3%	11.4%	8.7%	8.5%	9.2%	6.3%
Day spend	4.5%	6.2%	10.2%	8.0%	8.4%	7.0%	8.5%	11.2%	9.9%	7.1%	11.6%	7.4%

Seasonality - Overnight visitors (County level)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overnight trips	5.7%	7.2%	8.6%	8.3%	8.8%	8.6%	10.6%	9.8%	8.4%	7.1%	7.0%	10.0%
Overnight spend	4.8%	5.6%	9.0%	7.8%	9.7%	8.9%	12.8%	10.8%	10.2%	5.2%	5.2%	10.0%

Volume of Tourism

Staying visits in the county context Kent - 2017 Results

Staying trips in the county context	Domestic trips ('000)	Overseas trips ('000)
Ashford	281	110
Canterbury	461	186
Dartford	135	46
Dover	336	86
Gravesham	149	40
Maidstone	288	83
Medway	423	101
Sevenoaks	168	63
Folkestone & Hythe	395	75
Swale	355	43
Thanet	345	148
Tonbridge&Malling	193	49
Tunbridge Wells	246	65
Kent	**3,775**	**1,095**

Staying nights in the county context	Domestic nights ('000)	Overseas nights ('000)
Ashford	753	504
Canterbury	1,411	1,322
Dartford	386	239
Dover	952	487
Gravesham	389	243
Maidstone	746	525
Medway	1,251	686
Sevenoaks	434	353
Folkestone & Hythe	991	434
Swale	1,244	324
Thanet	1,040	1,120
Tonbridge&Malling	553	300
Tunbridge Wells	748	446
Kent	**10,898**	**6,983**

Staying spend in the county context	Domestic spend (millions)	Overseas spend (millions)
Ashford	£44	£29
Canterbury	£76	£73
Dartford	£19	£12
Dover	£63	£26
Gravesham	£16	£10
Maidstone	£38	£28
Medway	£60	£30
Sevenoaks	£23	£18
Folkestone & Hythe	£62	£20
Swale	£45	£12
Thanet	£54	£70
Tonbridge&Malling	£26	£13
Tunbridge Wells	£41	£20
Kent	**£568**	**£361**

Staying Visitors - Accommodation Type   Kent - 2017 Results

Trips by Accommodation

	UK		Overseas		Total	
Serviced	1,185,000	31%	385,000	35%	1,570,000	32%
Self catering	62,000	2%	33,000	3%	95,000	2%
Camping	294,000	8%	44,000	4%	338,000	7%
Static caravans	280,000	7%	23,000	2%	303,000	6%
Group/campus	56,000	1%	35,000	3%	91,000	2%
Paying guest	0	0%	31,000	3%	31,000	1%
Second homes	68,000	2%	21,000	2%	89,000	2%
Boat moorings	74,000	2%	0	0%	74,000	2%
Other	32,000	1%	33,000	3%	66,000	1%
Friends & relatives	1,724,000	46%	490,000	45%	2,214,000	45%
Total 2017	**3,775,000**		**1,095,000**		**4,870,000**	
Comparison 2015	**3,831,000**		**1,054,000**		**4,885,000**	
Difference	**-1%**		**4%**		**0%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	3,044,000	28%	1,013,000	14%	4,057,000	23%
Self catering	374,000	3%	479,000	7%	853,000	5%
Camping	419,000	4%	218,000	3%	637,000	4%
Static caravans	808,000	7%	41,000	1%	849,000	4%
Group/campus	247,000	2%	399,000	6%	646,000	4%
Paying guest	0	0%	209,000	3%	209,000	1%
Second homes	268,000	2%	272,000	4%	540,000	3%
Boat moorings	386,000	4%	0	0%	386,000	2%
Other	229,000	2%	49,000	1%	278,000	2%
Friends & relatives	5,123,000	48%	4,303,000	61%	9,426,000	52%
Total 2017	**10,898,000**		**6,983,000**		**17,881,000**	
Comparison 2015	**11,025,000**		**6,451,000**		**17,476,000**	
Difference	**-1%**		**8%**		**2%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£347,877,000	61%	£121,549,000	34%	£469,426,000	50%
Self catering	£16,587,000	3%	£19,732,000	5%	£36,319,000	4%
Camping	£11,392,000	2%	£9,621,000	3%	£21,013,000	2%
Static caravans	£22,451,000	4%	£1,913,000	1%	£24,364,000	2%
Group/campus	£2,809,000	0%	£23,656,000	6%	£26,465,000	3%
Paying guest	£0	0%	£14,395,000	4%	£14,395,000	2%
Second homes	£5,102,000	1%	£10,384,000	3%	£15,486,000	2%
Boat moorings	£7,377,000	1%	£0	0%	£7,377,000	1%
Other	£13,343,000	3%	£1,167,000	0%	£14,510,000	2%
Friends & relatives	£140,725,000	25%	£158,776,000	44%	£299,501,000	32%
Total 2017	**£567,663,000**		**£361,193,000**		**£928,856,000**	
Comparison 2015	**£571,595,000**		**£329,426,000**		**£901,021,000**	
Difference	**-1%**		**10%**		**3%**	

Serviced accommodation includes hotels, guesthouses, inns, B&B and serviced farmhouse accommodation. Paying guest refers to overseas visitors staying in private houses, primarily language school students. Other trips includes nights spent in transit, in lorry cabs and other temporary accommodation.

Staying Visitors - Purpose of Trip

Kent - 2017 Results

Trips by Purpose

	UK		Overseas		Total	
Holiday	1,661,000	44%	393,000	36%	2,054,000	42%
Business	415,000	11%	320,000	29%	735,000	15%
Friends & relatives	1,585,000	42%	301,000	28%	1,886,000	39%
Other	114,000	3%	37,000	3%	151,000	3%
Study	0	0%	44,000	4%	44,000	1%
Total 2017	**3,775,000**		**1,095,000**		**4,870,000**	
Comparison 2015	**3,831,000**		**1,054,000**		**4,885,000**	
Difference	**-1%**		**4%**		**0%**	

Nights by Purpose

	UK		Overseas		Total	
Holiday	5,455,000	50%	1,740,000	25%	7,195,000	40%
Business	1,420,000	13%	1,314,000	19%	2,734,000	15%
Friends & relatives	3,696,000	34%	2,533,000	36%	6,229,000	35%
Other	327,000	3%	350,000	5%	677,000	4%
Study	0	0%	1,046,000	15%	1,046,000	6%
Total 2017	**10,898,000**		**6,983,000**		**17,881,000**	
Comparison 2015	**11,025,000**		**6,451,000**		**17,476,000**	
Difference	**-1%**		**8%**		**2%**	

Spend by Purpose

	UK		Overseas		Total	
Holiday	£295,055,000	52%	£126,309,000	35%	£421,364,000	45%
Business	£119,040,000	21%	£72,328,000	20%	£191,368,000	21%
Friends & relatives	£102,080,000	18%	£101,210,000	28%	£203,290,000	22%
Other	£51,488,000	9%	£28,665,000	8%	£80,153,000	9%
Study	£0	0%	£32,681,000	9%	£32,681,000	4%
Total 2017	**£567,663,000**		**£361,193,000**		**£928,856,000**	
Comparison 2015	**£571,595,000**		**£329,426,000**		**£901,021,000**	
Difference	**-1%**		**10%**		**3%**	

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

Top 10 nations by volume of Visits (000s)		Top 10 nations by volume of spend (£m)	
Germany	177.1	Germany	£49.63
France	114.5	France	£31.75
Poland	96.8	USA	£26.83
Spain	85.2	Spain	£21.31
Netherlands	78.2	Australia	£19.51
Romania	69.6	Bulgaria	£18.89
Belgium	66.2	Czech Republic	£16.26
Other Eastern Europe	55.2	Netherlands	£14.78
USA	48.9	Belgium	£13.59
Irish Republic	34.1	Italy	£11.43

Source: International Passenger Survey, 2017

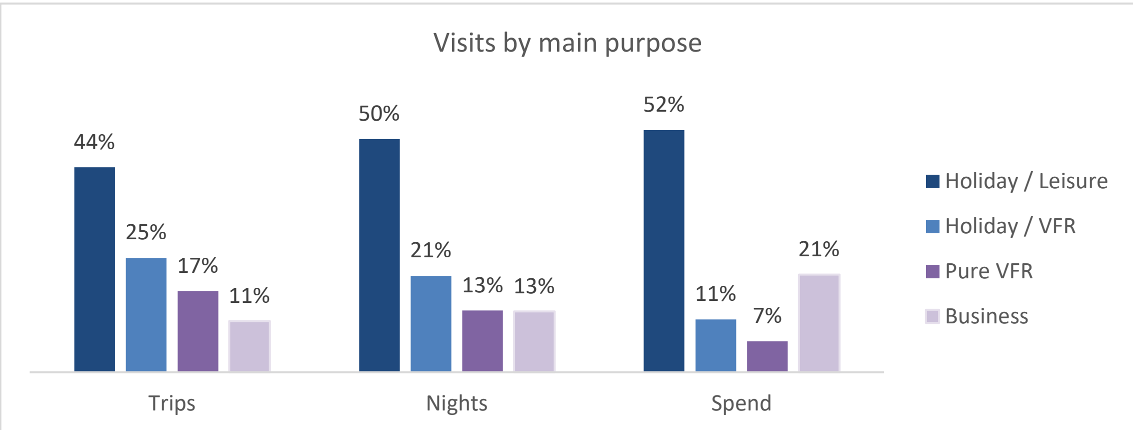
Domestic Overnight Visitors - Purpose of Trip   Kent - 2017 Results

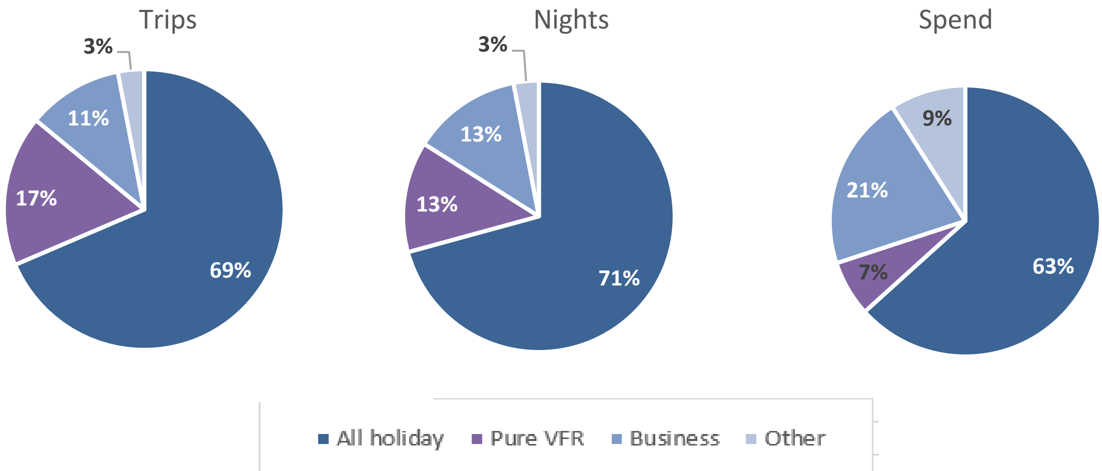
Total holiday trips include visits to destinations in Kent for pleasure / leisure purposes staying with friends and relatives. Pure VFR are visits to friends and relatives for social and personal reasons, and do not include holiday trips staying with friends and relatives.

	Trips		Nights		Expenditure	
Holiday / Leisure	1,661,000	44%	5,455,000	50%	£295,055,000	52%
Holiday / VFR	927,000	25%	2,255,000	21%	£64,310,000	11%
Pure VFR	658,000	17%	1,441,000	13%	£37,770,000	7%
Business	415,000	11%	1,420,000	13%	£119,040,000	21%
Other	114,000	3%	327,000	3%	£51,488,000	9%
Total	**3,775,000**		**10,898,000**		**£567,663,000**	

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

	Holiday / Leisure	Holiday / VFR	Pure VFR	Business
Average length stay (nights x trip)	3.3	2.4	2.2	3.4
Spend x overnight trip	£177.64	£69.37	£57.40	£286.84
Spend x night	£54.09	£28.52	£26.21	£83.83





Day Visitors

Kent - 2017 Results

Total Volume and Value of Day Trips

		Trips		Spend	
Urban visits		37,705,000	63%	£1,468,880,000	72%
Countryside visits		16,876,000	28%	£409,558,000	20%
Coastal visits		5,519,000	9%	£158,294,000	8%
Total	**2017**	**60,100,000**	**100%**	**£2,036,732,000**	**100%**
Comparison	**2015**	**55,748,000**		**£1,874,185,000**	
Difference		**8%**		**9%**	

Day Visitors in the county context

District	Day Visits (millions)	Day Visit Spend (millions)
Ashford	4.0	£141.4
Canterbury	7.1	£238.1
Dartford	10.6	£404.7
Dover	4.2	£127.0
Gravesham	1.8	£52.6
Maidstone	4.1	£135.6
Medway	4.4	£144.5
Sevenoaks	4.0	£140.4
Folkestone & Hythe	4.3	£127.7
Swale	4.7	£141.4
Thanet	3.7	£136.3
Tonbridge&Malling	2.8	£89.6
Tunbridge Wells	4.2	£157.4
Kent	**60.1**	**£2,036.7**

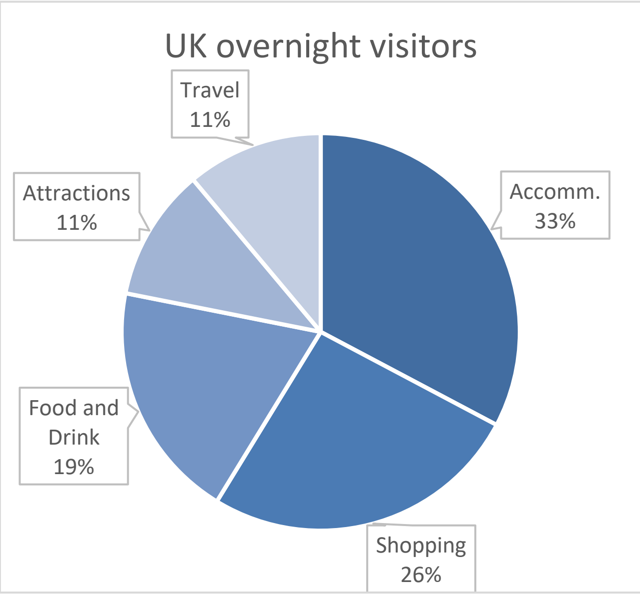
Value of Tourism

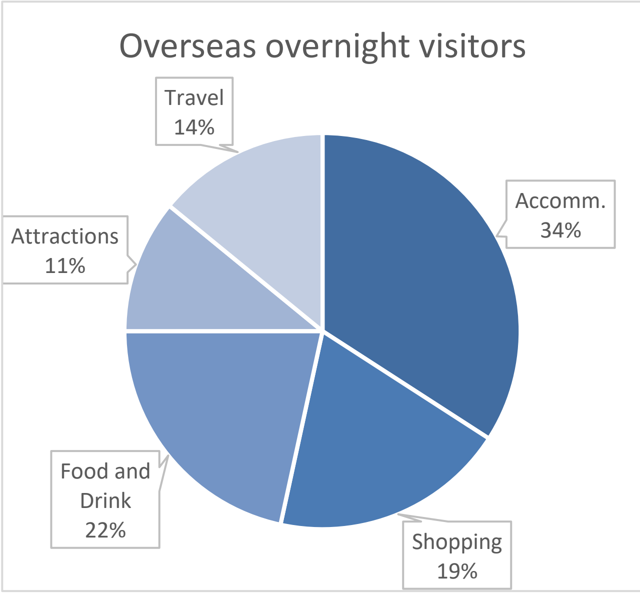
Expenditure Associated with Trips

Kent - 2017 Results

Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK visitors	£185,938,000	£147,491,000	£110,030,000	£61,246,000	£62,958,000	£567,663,000
Overseas visitors	£123,254,000	£69,648,000	£77,984,000	£39,436,000	£50,872,000	£361,193,000
Total Staying	£309,192,000	£217,139,000	£188,014,000	£100,682,000	£113,829,000	£928,856,000
Total Staying (%)	33%	23%	20%	11%	12%	100%
Total Day Visitors	£0	£918,565,000	£716,930,000	£197,563,000	£203,674,000	£2,036,732,000
Total Day Visitors (%)	0%	45%	35%	10%	10%	0%
Total 2017	**£309,192,000**	**£1,135,704,000**	**£904,944,000**	**£298,245,000**	**£317,503,000**	**£2,965,588,000**
%	**10%**	**38%**	**31%**	**10%**	**11%**	**100%**
Comparison 2015	**£312,577,000**	**£1,014,101,000**	**£858,379,000**	**£280,200,000**	**£330,207,000**	**£2,795,464,000**
Difference	**-1%**	**12%**	**5%**	**6%**	**-4%**	**6%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£4,574,000	£4,731,000	£294,000	£253,960,000	£263,559,000

Spend on second homes is assumed to be an average of £2,000 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,000 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 £2,000. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £175 per visit has been assumed based on national research for social and personal visits.

Direct Turnover Derived From Trip

Kent - 2017 Results

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

		Staying Visitors	Day Visitors	Total
Accommodation		£324,795,000	£14,343,000	£339,138,000
Retail		£166,098,000	£909,668,000	£1,075,766,000
Catering		£191,186,000	£695,642,000	£886,828,000
Attractions		£103,392,000	£213,986,000	£317,378,000
Transport		£85,698,000	£122,243,000	£207,941,000
Non-trip spend		£263,559,000	£0	£263,559,000
Total Direct	**2017**	**£1,134,728,000**	**£1,955,882,000**	**£3,090,610,000**
Comparison	**2015**	**£1,062,717,400**	**£1,818,665,000**	**£2,881,382,400**
Difference		**7%**	**8%**	**7%**

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

Supplier and Income Induced Turnover

		Staying Visitors	Day Visitors	Total
Indirect spend		£193,744,000	£273,499,000	£467,243,000
Non trip spending		£24,290,000	£0	£24,290,000
Income induced		£126,185,000	£156,599,000	£282,784,000
Total	**2017**	**£344,219,000**	**£430,098,000**	**£774,317,000**
Comparison	**2015**	**£329,047,000**	**£399,924,000**	**£728,971,000**
Difference		**5%**	**8%**	**6%**

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

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

		Staying Visitors	Day Visitors	Total
Direct		£1,134,728,000	£1,955,882,000	£3,090,610,000
Indirect		£344,219,000	£430,098,000	£774,317,000
Total Value	**2017**	**£1,478,947,000**	**£2,385,980,000**	**£3,864,927,000**
Comparison	**2015**	**£1,391,764,400**	**£2,218,589,000**	**£3,610,353,400**
Difference		**6%**	**8%**	**7%**

Employment

Employment

Kent - 2017 Results

The model generates estimates of full time equivalent jobs based on visitor spending. The total number of 'actual' jobs will be higher when part time and seasonal working is taken into account. Conversion of full time equivalent jobs into actual jobs relies on information from business surveys in the sectors receiving visitor spending. A new Full Time Equivalent tourism job is created with every £54,000 increase in tourism revenue.

Direct employment

Full time equivalent (FTE)							
		Staying Visitors		Day Visitor		Total	
Accommodation		6,203	34%	304	1%	6,507	15%
Retailing		1,798	10%	9,472	37%	11,270	26%
Catering		3,450	19%	12,155	47%	15,605	35%
Entertainment		1,331	8%	2,657	10%	3,987	9%
Transport		887	5%	1,143	5%	2,030	5%
Non-trip spend		4,393	24%	0	0%	4,393	10%
Total FTE	**2017**	**18,062**		**25,731**		**43,793**	
Comparison	**2015**	**16,900**		**23,926**		**40,825**	
Difference		**7%**		**8%**		**7%**	

Estimated actual jobs							
		Staying Visitors		Day Visitor		Total	
Accommodation		9,181	36%	450	1%	9,630	15%
Retailing		2,697	11%	14,208	37%	16,905	27%
Catering		5,176	21%	18,232	48%	23,408	37%
Entertainment		1,877	7%	3,747	10%	5,624	9%
Transport		1,251	5%	1,611	4%	2,862	4%
Non-trip spend		5,008	20%	0	0%	5,008	8%
Total Actual	**2017**	**25,188**		**38,248**		**63,437**	
Comparison	**2015**	**23,726**		**35,565**		**59,291**	
Difference		**6%**		**8%**		**7%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitors	Day Visitors	Total
Indirect jobs		2,907	3,647	6,554
Induced jobs		2,337	2,900	5,237
Total FTE	**2017**	**5,244**	**6,547**	**11,791**
Comparison	**2015**	**5,013**	**6,087**	**11,100**
Difference		**5%**	**8%**	**6%**

Estimated actual jobs				
		Staying Visitors	Day Visitors	Total
Indirect jobs		3,315	4,157	7,472
Induced jobs		2,653	3,291	5,944
Total Actual	**2017**	**5,967**	**7,449**	**13,415**
Comparison	**2015**	**5,703**	**6,926**	**12,629**
Difference		**5%**	**8%**	**6%**

Total Tourism Jobs   Kent - 2017 Results

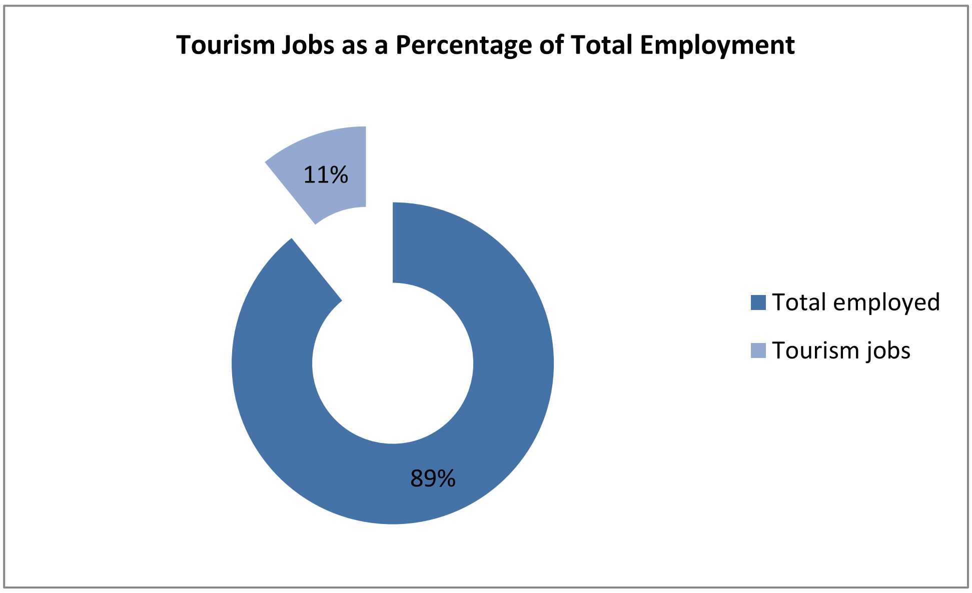
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitors		Day Visitor		Total	
Direct		18,062	77%	25,730	80%	43,793	79%
Indirect		2,907	13%	3,647	11%	6,554	12%
Induced		2,337	10%	2,900	9%	5,237	9%
Total FTE	**2017**	**23,307**		**32,277**		**55,583**	
Comparison	2015	21,912		30,013		51,925	
Difference		6%		8%		7%	

Estimated actual jobs							
		Staying Visitors		Day Visitor		Total	
Direct		25,188	81%	38,248	84%	63,437	82%
Indirect		3,315	11%	4,157	9%	7,472	10%
Induced		2,652	8%	3,291	7%	5,944	8%
Total Actual	**2017**	**31,156**		**45,696**		**76,852**	
Comparison	2015	29,429		42,491		71,920	
Difference		6%		8%		7%	

Tourism Jobs as a Percentage of Total Employment (*)

		Staying Visitors	Day visitors	Total
Total employed		711,200	711,200	711,200
Tourism jobs		31,156	45,696	76,852
Proportion all jobs		**4%**	**6%**	**11%**
Comparison	2015	29,429	42,491	71,920
Difference		6%	8%	7%



(*) Is it estimated that an additional 6,023 actual jobs are supported by Bluewater Shopping Centre, raising the total employment in Dartford District to 9,765, or 16% of all the employment.

The key 2017 results of the Economic Impact Assessment are:

65.0 million trips were undertaken in the area
60.1 million day trips
4.9 million overnight visits

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

£3,091 million spent by tourists during their visit to the area
£258 million spent on average in the local economy each month.

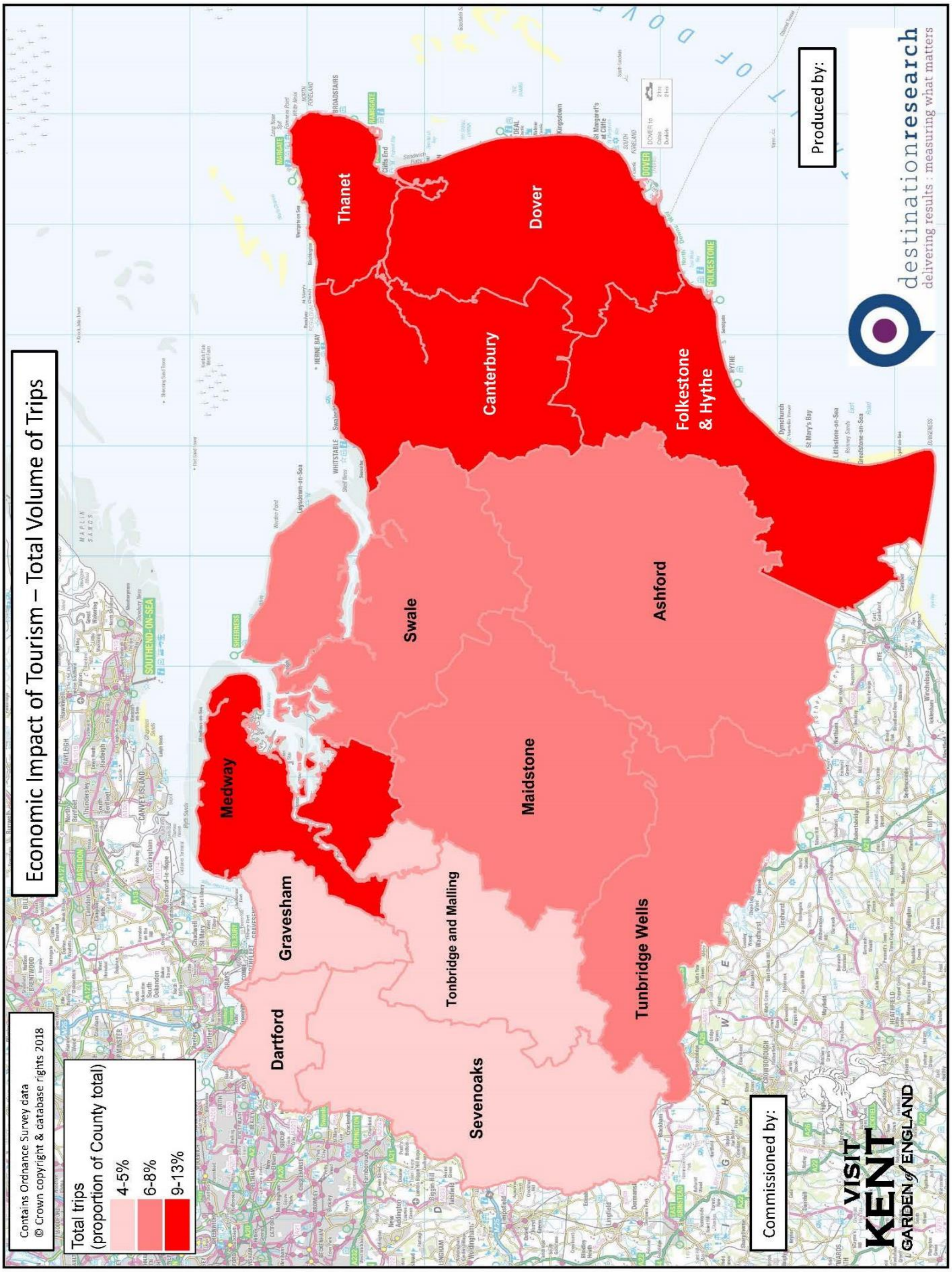
£929 million generated by overnight visits
£2,037 million generated from day trips.

£3,865 million spent in the local area as result of tourism, taking into account multiplier effects.

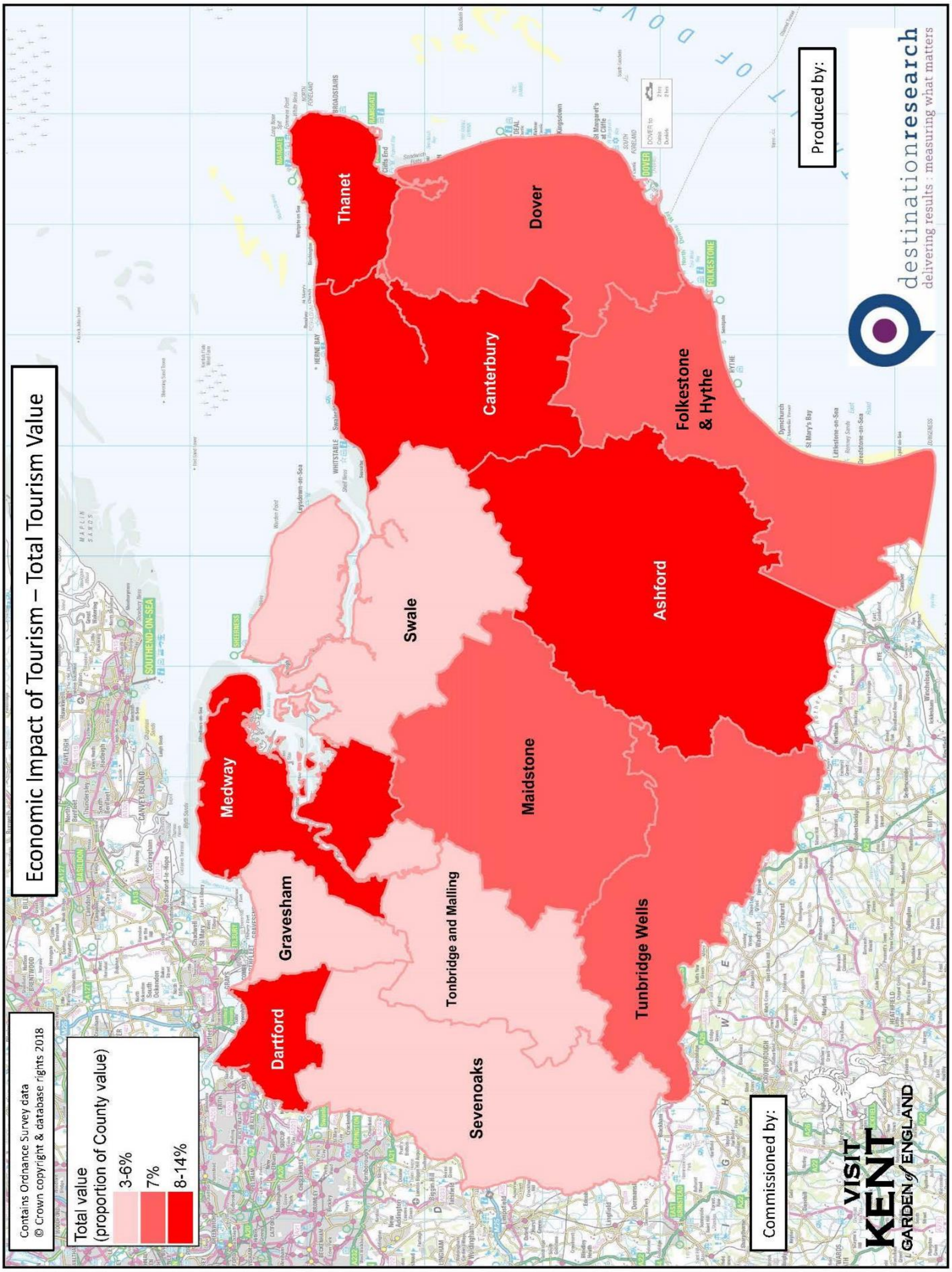
76,852 jobs supported, both for local residents and from those living nearby.
63,437 tourism jobs directly supported
13,415 non-tourism related jobs supported linked to multiplier spend from tourism.

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

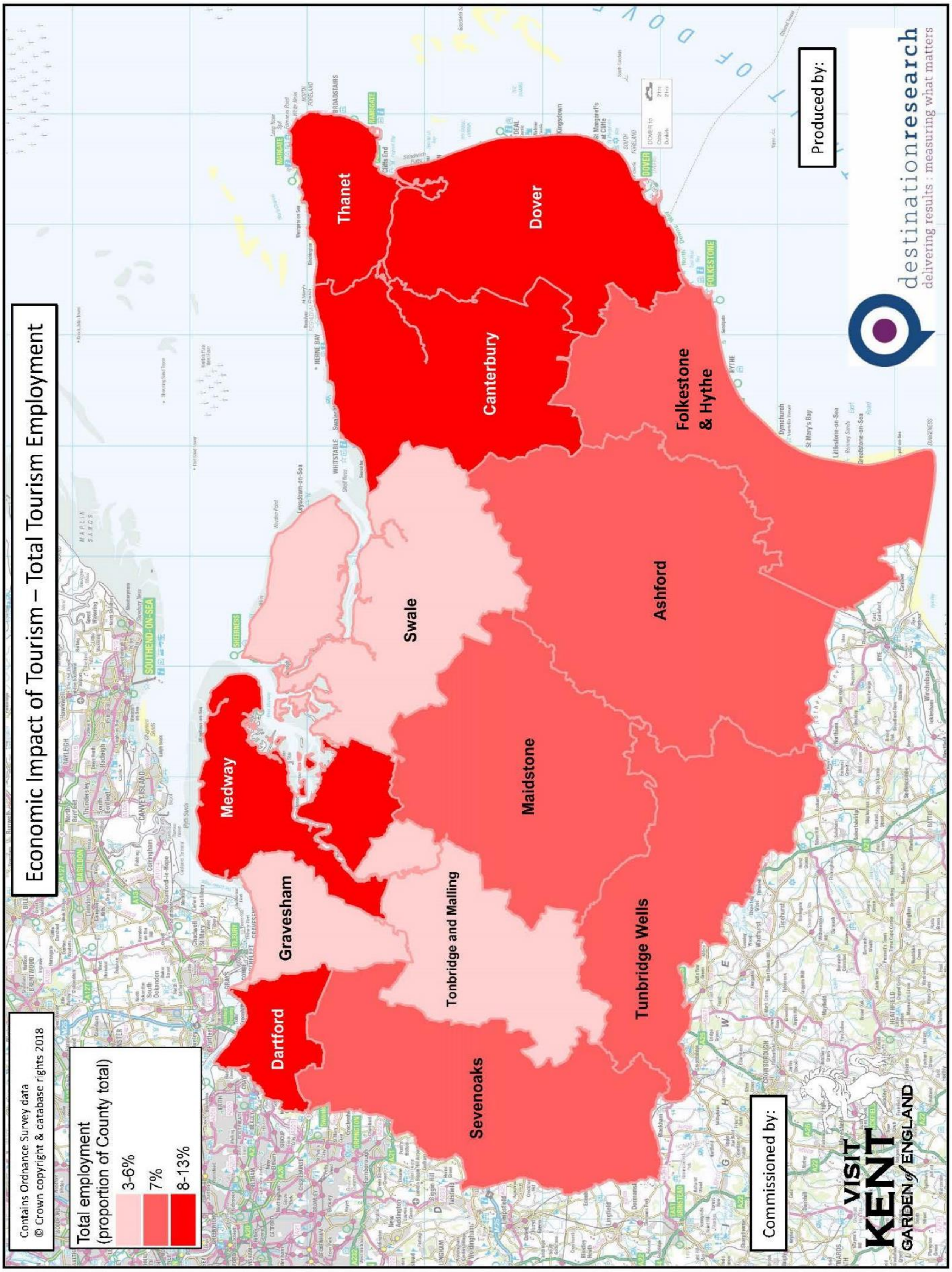
Thematic maps - Total Volume of Trips



Thematic maps - Total Tourism Value



Thematic maps - Total Tourism Employment



Appendix I - Introduction about Cambridge Model

This report examines the volume and value of tourism and the impact of that expenditure on the local economy. The figures were derived using the Cambridge Economic Impact Model and the research was undertaken by Destination Research.

The model utilises information from national tourism surveys and regionally based data held by Destination Research. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level.

Limitations of the Model

The methodology and accuracy of the above sources vary. The results of the model should therefore be regarded as estimates which are indicative of the scale and importance of visitor activity in the local area. It is important to note that in the national tourism surveys the sample sizes for each area changes year on year. This is as a result of the random probability nature of the methodology. As such, the results of the Cambridge Model are best viewed as a snapshot in time and we would caution against year-on-year comparisons.

It should be noted that the model cannot take into account any leakage of expenditure from tourists taking day trips out of the area in which they are staying. While it is assumed that these may broadly balance each other in many areas, in locations receiving significant numbers of day visitors from London, there is likely to be an underestimate in relation to the number of overseas day visitors staying in holiday accommodation in London.

Whilst it is important to be aware of these issues, we are confident that the estimates we have produced are as reliable as is practically possible within the constraints of the information available.

Rounding

All figures used in this report have been rounded. Therefore, in some tables there may be a slight discrepancy between totals and sub totals.

Data sources

The main national surveys used as data sources in stage one include:

- Great Britain Tourism Survey (GBTS) - information on tourism activity by GB residents;
- International Passenger Survey (IPS) information on overseas visitors to the United Kingdom;
- Day Visits in the annual Great Britain Day Visitor Survey using information on visits lasting more than 3 hours and taken on an irregular basis

These surveys provide information down to a regional level. In order to disaggregate data to a local level the following information sources are used:

- Records of known local accommodation stock held by Destination Research;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions ;
- Mid- 2017 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. The survey includes all leisure-related trips from home. It should be noted that a large proportion are local trips made by people resident in the locality. The model uses information from the survey to estimate the number of longer day trips (defined as those lasting at least 3 hours and involving travel of more than 20 miles) and irregular trips lasting more than 3 hours.

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 district.

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 2017

The Cambridge Model allows for the use of local visitor related data. Local data from visitor survey 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 source data to feed into the model. We have also used data from Visit Kent's Business Barometer. The following local data has been included in the 2017 Kent results:

Dartford - Bluewater Shopping Centre **-** Bluewater attracted 28 million visitors in 2017. Only about a quarter of these visits is accounted for in the Cambridge Model, equating to about 7.8 million visits.

Dover District - Cruise Passengers data - Port of Dover received about 225,000 cruise passengers in 2017. Official statistics (DfT) suggest that about half of all passengers to Dover would be 'port calls' visits. Furthermore, cruise passengers are included at both departure and arrival if their journey begins and ends at a UK seaport. We made the following assumptions:

A total of 112,000 cruise passengers were classed as 'port call' visits and have been counted as day visitors. For the additional estimated 112,000 that departed or finished their trip in Dover we assume that most would start and finish their trip at Dover. A multiplier factor of 0.6 has been applied to avoid double counting and the additional trips have been added as extra serviced accommodation trips (67,500).

Tonbridge & Malling - Tonbridge Castle visitor numbers have rebounded recently, following a drop in performance between 2014-2016. The latest admission figures have been included in the district results.

Other anecdotal information taken into consideration was the significant growth in high-end independent cafes and restaurants in Tonbridge since 2016, now making it quite a foody destination (includes Tonbridge Old Fire Station, Beyond the Grounds, Basil, Havet, Saltwaters, Verdigris, Fuggles and Paws Cat Café). Outside of Tonbridge, Aylesford Priory attracts hundreds of thousands of visitors each year. The latest admission figures have been included in the district results.

Folkestone & Hythe District Council (previously Shepway District)
The latest admission figures for Romney Marsh Visitor Centre have been included in the district results. Folkestone Triennial 2017 - During September and October 2017 the Triennial attracted record high visitor numbers . The latest admission figures have been included in the district results.

Ashford
Annual footfall figures for the Big Cat Sanctuary in Smarden have been included.
Car park data shows that Ashford carparks saw a 2% drop in users and Tenterden a 1% drop.

Medway
Increase in the number of festivals and events (Sweeps Festival, Dickens Summer Festival, Rochester Castle concerts, Medieval Merriment, Dickensian Christmas Festival, 'The Battle of Medway' (two weeks in June 2017) with additional 200 Dutch yachts and many visitors to the two week series of events. Coach visits (2017) 22,047 coaches and assumed 114,608 visitors (assumes x54 pax per coach).

Swale
We have used selected information from the Destination Intelligence reports submitted as part of their British Destination membership and the data sharing and benchmarking research.

Thanet
Thanet Language Schools – Figures for 2017 compared to 2015 show an 11% increase in volume. Southeastern - Comparison stats for 2015 and 2017 - For travel to Margate, Broadstairs and Ramsgate only, journeys on Off-Peak products increased by 33% from April 2016 to March 2017 compared to the previous year.

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