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Commissioned by:

Visit Kent



Economic Impact of Tourism

Sevenoaks - 2017 Results

Produced by:

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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%.

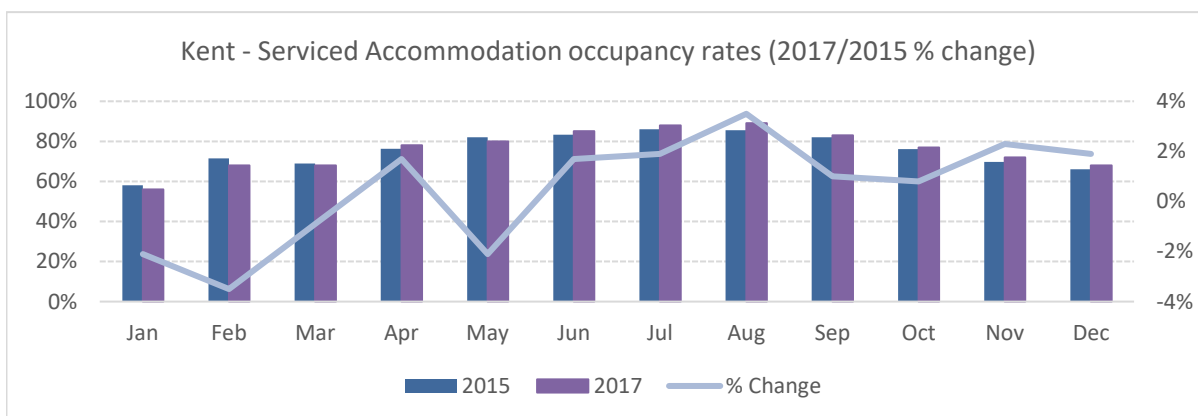
The South East region experienced a 1% increase in overnight trips between 2015 and 2017. Bednights were up 2% on 2015 and expenditure was up by 3%. The region received slightly more visitors in 2017 than in 2015 and visitors spent slightly more per night than in 2015. The average spend per night was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

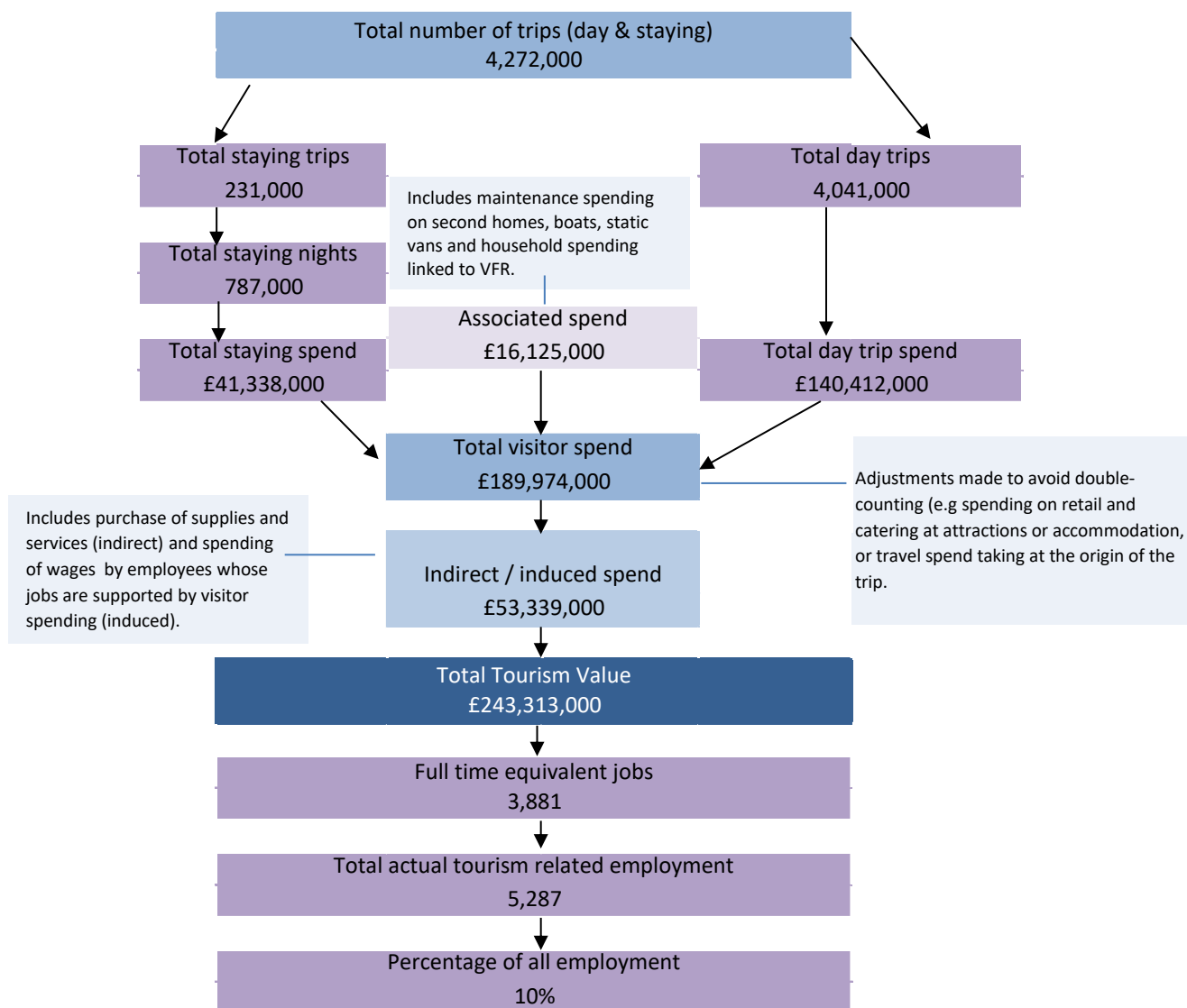
The results for Kent are based on a combination of results from the GB Day Visitor Survey, admissions data from the Visits to Visitor Attractions Survey, the ALVA (Association of Leading Visitor Attractions) Survey and attractions visitor numbers from the Visit Kent Business Barometer.

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

## Sevenoaks - 2017 Results



### Economic Impact of Tourism – Year on year comparisons

### Sevenoaks

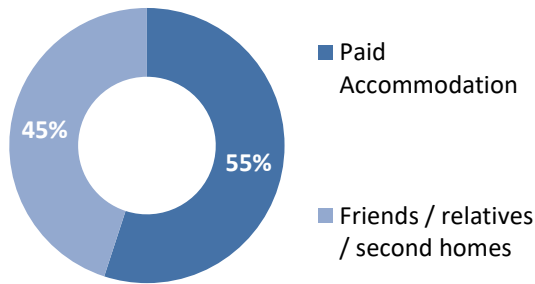
	2015	2017	Annual variation
<b>Day Trips</b>			
Day trips Volume	3,708,000	4,041,000	9.0%
Day trips Value	£134,020,000	£140,412,000	4.8%
<b>Overnight trips</b>			
Number of trips	231,000	231,000	0.0%
Number of nights	758,000	787,000	3.8%
Trip value	£40,710,000	£41,338,000	1.5%
<b>Total Value</b>	<b>£230,829,000</b>	<b>£243,313,000</b>	<b>5.4%</b>
<b>Actual Jobs</b>	<b>5,032</b>	<b>5,287</b>	<b>5.1%</b>

Sevenoaks	2015	2017	Variation
Average length stay (nights x trip)	3.28	3.41	3.8%
Spend x overnight trip	£ 176.23	£ 178.95	1.5%
Spend x night	£ 53.71	£ 52.53	-2.2%
Spend x day trip	£ 36.14	£ 34.75	-3.9%

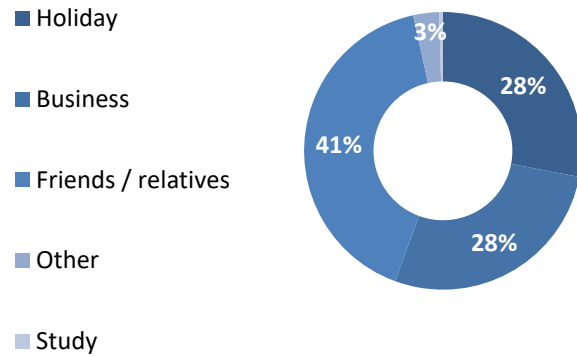
**Economic Impact of Tourism – Headline Figures**

**Sevenoaks - 2017 Results**

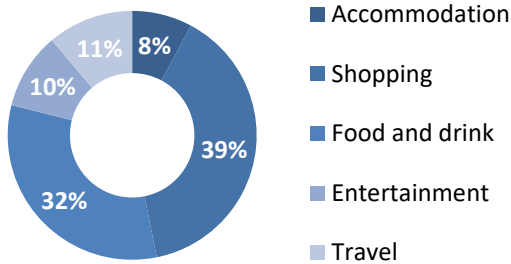
**Trips by type of accommodation**



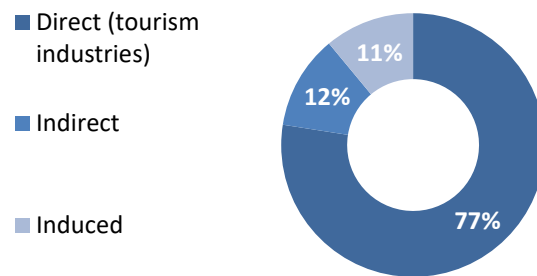
**Trips by Purpose**



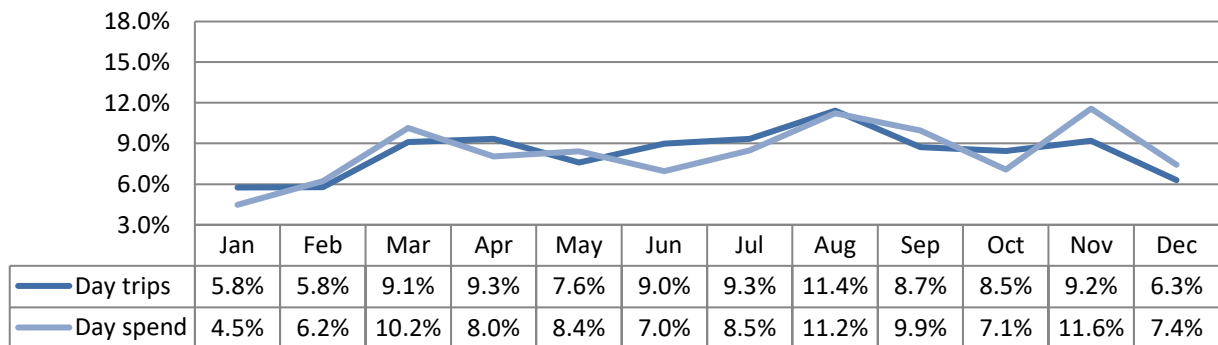
**Breakdown of expenditure**



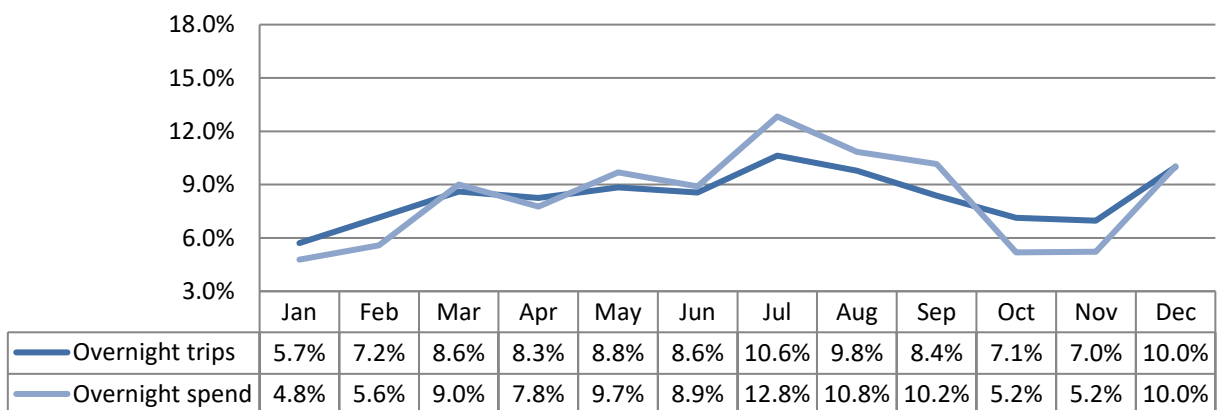
**Type of employment**



**Seasonality - Day visitors (County level)**



**Seasonality - Overnight visitors (County level)**



## Volume of Tourism



## Staying visits in the county context

## Sevenoaks - 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
<b>Kent</b>	<b>3,775</b>	<b>1,095</b>

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
<b>Kent</b>	<b>10,898</b>	<b>6,983</b>

Expenditure 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	£21
<b>Kent</b>	<b>£568</b>	<b>£361</b>

## Staying Visitors - Accommodation Type

## Sevenoaks - 2017 Results

### Trips by Accommodation

	UK		Overseas		Total	
Serviced	61,000	36%	31,000	50%	92,000	40%
Self catering	3,000	2%	5,000	7%	8,000	3%
Camping	9,000	5%	2,000	4%	11,000	5%
Static caravans	0	0%	0	0%	0	0%
Group/campus	2,000	1%	4,000	6%	6,000	3%
Paying guest	0	0%	0	0%	0	0%
Second homes	2,000	1%	1,000	1%	3,000	1%
Boat moorings	0	0%	0	0%	0	0%
Other	4,000	2%	5,000	8%	9,000	4%
Friends & relatives	88,000	52%	15,000	24%	103,000	45%
<b>Total 2017</b>	<b>168,000</b>		<b>63,000</b>		<b>231,000</b>	
Comparison 2015	170,000		61,000		231,000	
Difference	-1%		3%		0%	

### Nights by Accommodation

	UK		Overseas		Total	
Serviced	133,000	31%	103,000	29%	236,000	30%
Self catering	16,000	4%	27,000	8%	43,000	5%
Camping	22,000	5%	14,000	4%	36,000	5%
Static caravans	0	0%	0	0%	0	0%
Group/campus	6,000	1%	27,000	8%	33,000	4%
Paying guest	0	0%	0	0%	0	0%
Second homes	7,000	2%	1,000	0%	8,000	1%
Boat moorings	0	0%	0	0%	0	0%
Other	24,000	5%	10,000	3%	34,000	4%
Friends & relatives	226,000	52%	170,000	48%	396,000	50%
<b>Total 2017</b>	<b>434,000</b>		<b>353,000</b>		<b>787,000</b>	
Comparison 2015	441,000		317,000		758,000	
Difference	-2%		11%		4%	

### Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£14,231,000	62%	£10,245,000	56%	£24,476,000	59%
Self catering	£799,000	3%	£930,000	5%	£1,729,000	4%
Camping	£559,000	2%	£508,000	3%	£1,067,000	3%
Static caravans	£0	0%	£0	0%	£0	0%
Group/campus	£62,000	0%	£1,309,000	7%	£1,371,000	3%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£121,000	1%	£26,000	0%	£147,000	0%
Boat moorings	£0	0%	£0	0%	£0	0%
Other	£1,300,000	6%	£196,000	1%	£1,496,000	4%
Friends & relatives	£5,883,000	26%	£5,170,000	28%	£11,053,000	27%
<b>Total 2017</b>	<b>£22,954,000</b>		<b>£18,384,000</b>		<b>£41,338,000</b>	
Comparison 2015	£23,160,000		£17,550,000		£40,710,000	
Difference	-1%		5%		2%	

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

## Sevenoaks - 2017 Results

### Trips by Purpose

		UK		Overseas		Total	
Holiday		58,000	35%	7,000	11%	65,000	28%
Business		31,000	18%	33,000	52%	64,000	28%
Friends & relatives		75,000	45%	20,000	32%	95,000	41%
Other		4,000	2%	3,000	5%	7,000	3%
Study		0	0%	1,000	2%	1,000	0%
<b>Total</b>	<b>2017</b>	<b>168,000</b>		<b>63,000</b>		<b>231,000</b>	
Comparison	2015	170,000		61,000		231,000	
Difference		-1%		3%		0%	

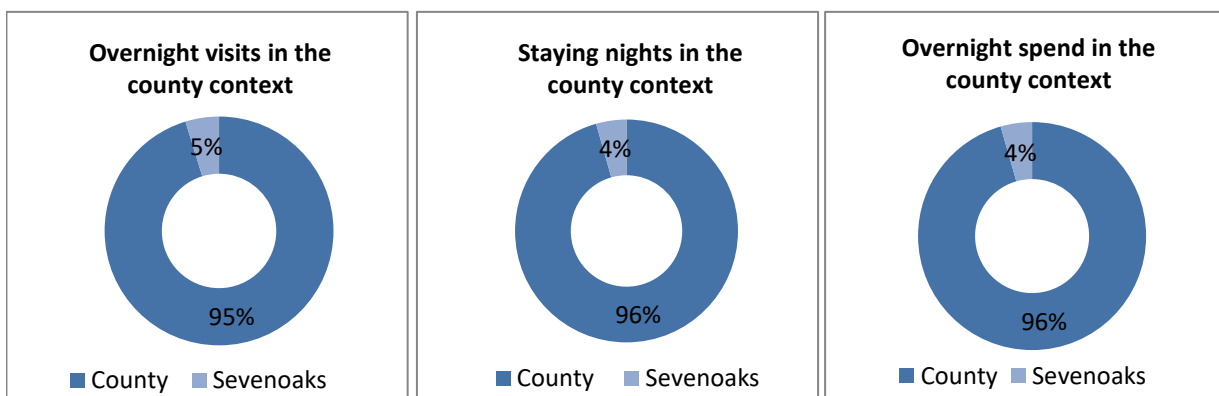
### Nights by Purpose

		UK		Overseas		Total	
Holiday		187,000	43%	37,000	10%	224,000	28%
Business		94,000	22%	92,000	26%	186,000	24%
Friends & relatives		142,000	33%	182,000	52%	324,000	41%
Other		12,000	3%	22,000	6%	34,000	4%
Study		0	0%	21,000	6%	21,000	3%
<b>Total</b>	<b>2017</b>	<b>434,000</b>		<b>353,000</b>		<b>787,000</b>	
Comparison	2015	441,000		317,000		758,000	
Difference		-2%		11%		4%	

### Spend by Purpose

		UK		Overseas		Total	
Holiday		£11,885,000	52%	£2,731,000	15%	£14,616,000	35%
Business		£6,945,000	30%	£6,702,000	36%	£13,647,000	33%
Friends & relatives		£3,905,000	17%	£5,873,000	32%	£9,778,000	24%
Other		£219,000	1%	£1,913,000	10%	£2,132,000	5%
Study		£0	0%	£1,165,000	6%	£1,165,000	3%
<b>Total</b>	<b>2017</b>	<b>£22,954,000</b>		<b>£18,384,000</b>		<b>£41,338,000</b>	
Comparison	2015	£23,160,000		£17,550,000		£40,710,000	
Difference		-1%		5%		2%	

### Proportion of staying visits in the county context

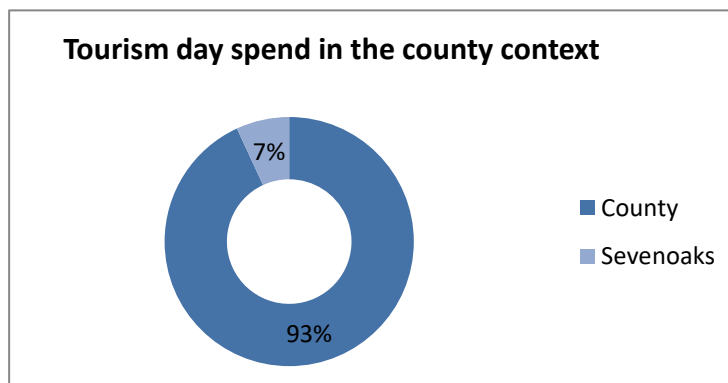
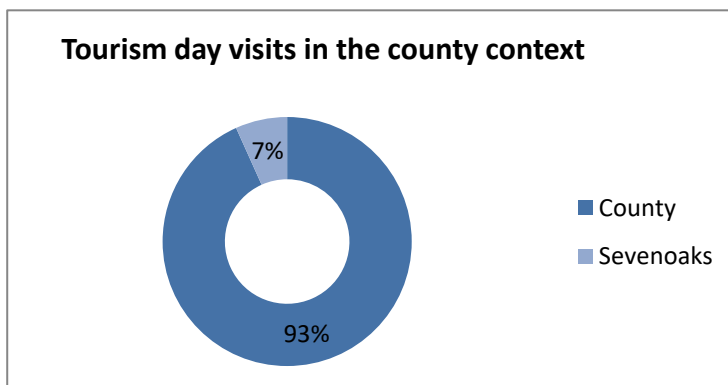


**Total Volume and Value of Day Trips**

		Trips	Spend
Total	2017	4,041,000	£140,412,000
Comparison	2015	3,708,000	£134,020,000
Difference		9%	5%

**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	£135.7
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	4.3	£157.4
<b>Kent</b>	<b>60.1</b>	<b>£2,036.7</b>



## Value of Tourism

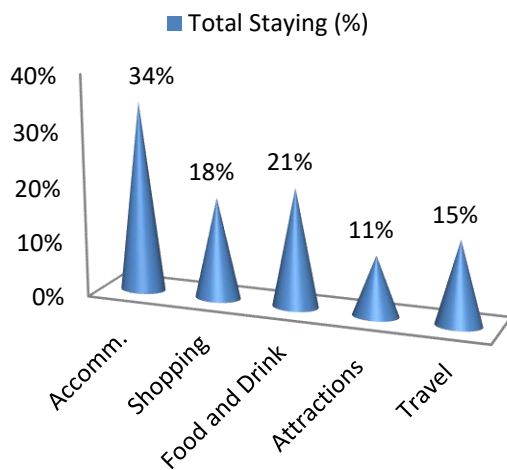
## Expenditure Associated with Trips

## Sevenoaks - 2017 Results

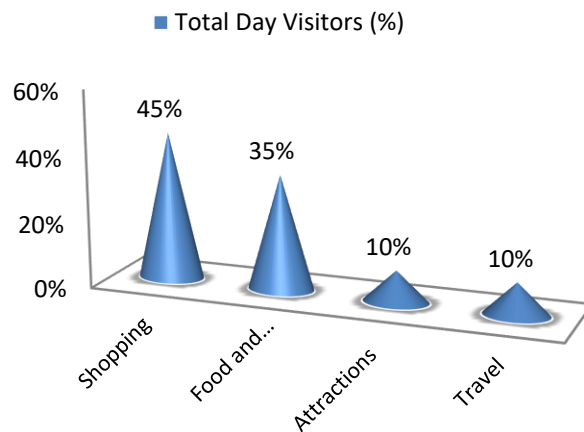
### Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£8,410,000	£2,816,000	£4,969,000	£2,317,000	£4,442,000	£22,954,000
Overseas tourists	£5,813,000	£4,752,000	£3,887,000	£2,153,000	£1,779,000	£18,384,000
<b>Total Staying</b>	<b>£14,223,000</b>	<b>£7,568,000</b>	<b>£8,856,000</b>	<b>£4,470,000</b>	<b>£6,221,000</b>	<b>£41,338,000</b>
<b>Total Staying (%)</b>	<b>34%</b>	<b>18%</b>	<b>21%</b>	<b>11%</b>	<b>15%</b>	<b>100%</b>
<b>Total Day Visitors</b>	<b>£0</b>	<b>£63,326,000</b>	<b>£49,425,000</b>	<b>£13,620,000</b>	<b>£14,041,000</b>	<b>£140,412,000</b>
<b>Total Day Visitors (%)</b>	<b>0%</b>	<b>45%</b>	<b>35%</b>	<b>10%</b>	<b>10%</b>	<b>100%</b>
<b>Total 2017</b>	<b>£14,223,000</b>	<b>£70,894,000</b>	<b>£58,281,000</b>	<b>£18,090,000</b>	<b>£20,262,000</b>	<b>£181,750,000</b>
<b>%</b>	<b>8%</b>	<b>39%</b>	<b>32%</b>	<b>10%</b>	<b>11%</b>	<b>100%</b>
Comparison 2015	£14,464,000	£67,652,000	£55,812,000	£17,264,000	£19,539,000	£174,731,000
Difference	-2%	5%	4%	5%	4%	4%

### Breakdown of expenditure



### Breakdown of expenditure



### Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	Boats	Static vans	Friends & relatives	Total
£151,000	£0	£0	£15,974,000	£16,125,000

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

## Sevenoaks - 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 Visitor	Day Visitors	Total
Accommodation		£14,478,000	£988,000	£15,466,000
Retail		£7,528,000	£62,692,000	£70,220,000
Catering		£8,636,000	£47,942,000	£56,578,000
Attractions		£4,658,000	£14,747,000	£19,405,000
Transport		£3,755,000	£8,425,000	£12,180,000
Non-trip spend		£16,125,000	£0	£16,125,000
<b>Total Direct</b>	<b>2017</b>	<b>£55,180,000</b>	<b>£134,794,000</b>	<b>£189,974,000</b>
Comparison	2015	£51,553,000	£128,660,000	£180,213,000
Difference		7%	5%	5%

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

## Supplier and Income Induced Turnover

		Staying Visitor	Day Visitors	Total
Indirect spend		£5,156,000	£18,429,000	£23,585,000
Non trip spending		£2,419,000	£0	£2,419,000
Income induced		£8,318,000	£19,017,000	£27,335,000
<b>Total</b>	<b>2017</b>	<b>£15,893,000</b>	<b>£37,446,000</b>	<b>£53,339,000</b>
Comparison	2015	£14,874,000	£35,742,000	£50,616,000
Difference		7%	5%	5%

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

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

		Staying Visitor	Day Visitors	Total
Direct		£55,180,000	£134,794,000	£189,974,000
Indirect		£15,893,000	£37,446,000	£53,339,000
<b>Total Value</b>	<b>2017</b>	<b>£71,073,000</b>	<b>£172,240,000</b>	<b>£243,313,000</b>
Comparison	2015	£66,427,000	£164,402,000	£230,829,000
Difference		7%	5%	5%

## Employment



## Employment

## Sevenoaks - 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 Visitor		Day Visitor		Total	
Accommodation	288	33%	20	1%	307	11%
Retailing	90	10%	750	38%	840	30%
Catering	168	19%	931	47%	1,098	39%
Entertainment	59	7%	188	10%	247	9%
Transport	38	4%	84	4%	122	4%
Non-trip spend	230	26%	0	0%	230	8%
<b>Total FTE</b>	<b>2017</b>	<b>873</b>		<b>1,972</b>		<b>2,845</b>
Comparison	2015	822		1,883		2,705
Difference		6%		5%		5%
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Accommodation	403	35%	29	1%	432	11%
Retailing	126	11%	1,125	38%	1,251	31%
Catering	235	20%	1,396	48%	1,631	40%
Entertainment	83	7%	264	9%	347	8%
Transport	53	5%	119	4%	172	4%
Non-trip spend	263	23%	0	0%	263	6%
<b>Total Actual</b>	<b>2017</b>	<b>1,162</b>		<b>2,934</b>		<b>4,096</b>
Comparison	2015	1,101		2,800		3,902
Difference		5%		5%		5%

### Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	154	375	530
Induced jobs	154	352	506
<b>Total FTE</b>	<b>2017</b>	<b>308</b>	<b>728</b>
Comparison	2015	288	694
Difference		7%	5%

Estimated actual jobs			
	Staying Visitor	Day Visitors	Total
Indirect jobs	177	432	609
Induced jobs	177	405	582
<b>Total Actual</b>	<b>2017</b>	<b>355</b>	<b>837</b>
Comparison	2015	332	799
Difference		7%	5%

## Total Tourism Jobs

## Sevenoaks - 2017 Results

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

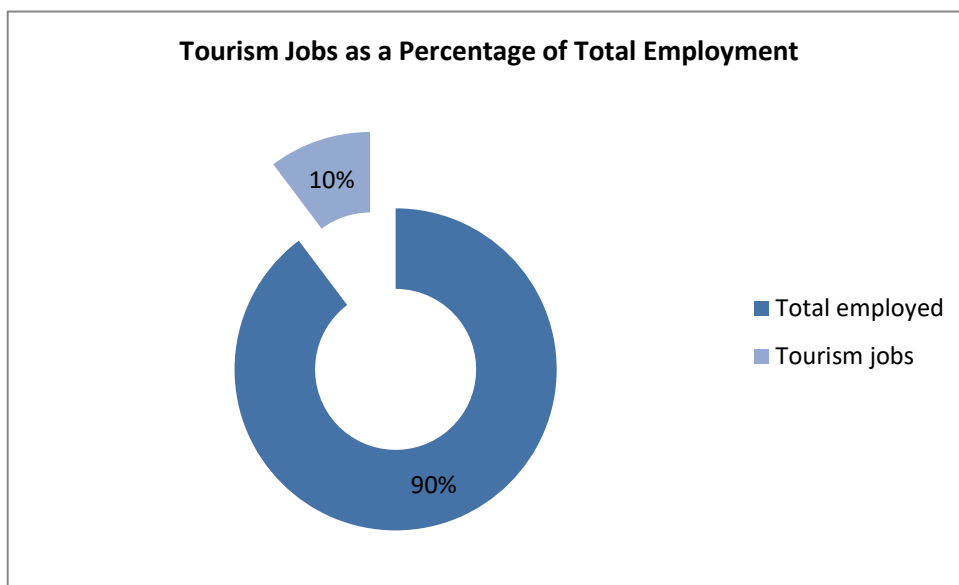
Full time equivalent (FTE)						
	Staying Visitor		Day Visitor		Total	
Direct	873	74%	1,972	73%	2,845	73%
Indirect	154	13%	375	14%	530	14%
Induced	154	13%	352	13%	506	13%
<b>Total FTE</b>	<b>2017</b>	<b>1,181</b>	<b>2,700</b>		<b>3,881</b>	
Comparison	<b>2015</b>	<b>1,111</b>	<b>2,577</b>		<b>3,688</b>	
Difference		6%	5%		5%	

Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Direct	1,162	77%	2,934	78%	4,096	77%
Indirect	177	12%	432	11%	609	12%
Induced	177	12%	405	11%	582	11%
<b>Total Actual</b>	<b>2017</b>	<b>1,516</b>	<b>3,771</b>		<b>5,287</b>	
Comparison	<b>2015</b>	<b>1,433</b>	<b>3,599</b>		<b>5,032</b>	
Difference		6%	5%		5%	

### Tourism Jobs as a Percentage of Total Employment

	Staying Visitor	Day visitors	Total
Total employed	51,500	51,500	51,500
Tourism jobs	1,516	3,771	5,287
<b>Proportion all jobs</b>	<b>3%</b>	<b>7%</b>	<b>10%</b>
Comparison	<b>2015</b>	<b>3,599</b>	<b>5,032</b>
Difference	6%	5%	5%



**The key 2017 results of the Economic Impact Assessment are:**

**4.3 million trips** were undertaken in the area

**4.0 million** day trips

**0.2 million** overnight visits

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

**£190 million** spent by tourists during their visit to the area

**£16 million** spent on average in the local economy each month.

**£41 million** generated by overnight visits

**£140 million** generated from day trips.

**£243 million** spent in the local area as result of tourism, taking into account multiplier effects.

**5,287 jobs** supported, both for local residents from those living nearby.

**4,096 tourism jobs** directly supported

**1,191 non-tourism related jobs** supported linked to multiplier spend from tourism.

## **Appendix I - Introduction about Cambridge Model**

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

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

### **Limitations of the Model**

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

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

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

### **Rounding**

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

### **Data sources**

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

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

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

- Records of known local accommodation stock held by Destination Research;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions ;
- 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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