



Commissioned by:

Visit Kent

Economic Impact of Tourism

Kent - 2021 Results

November 2022



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Introduction

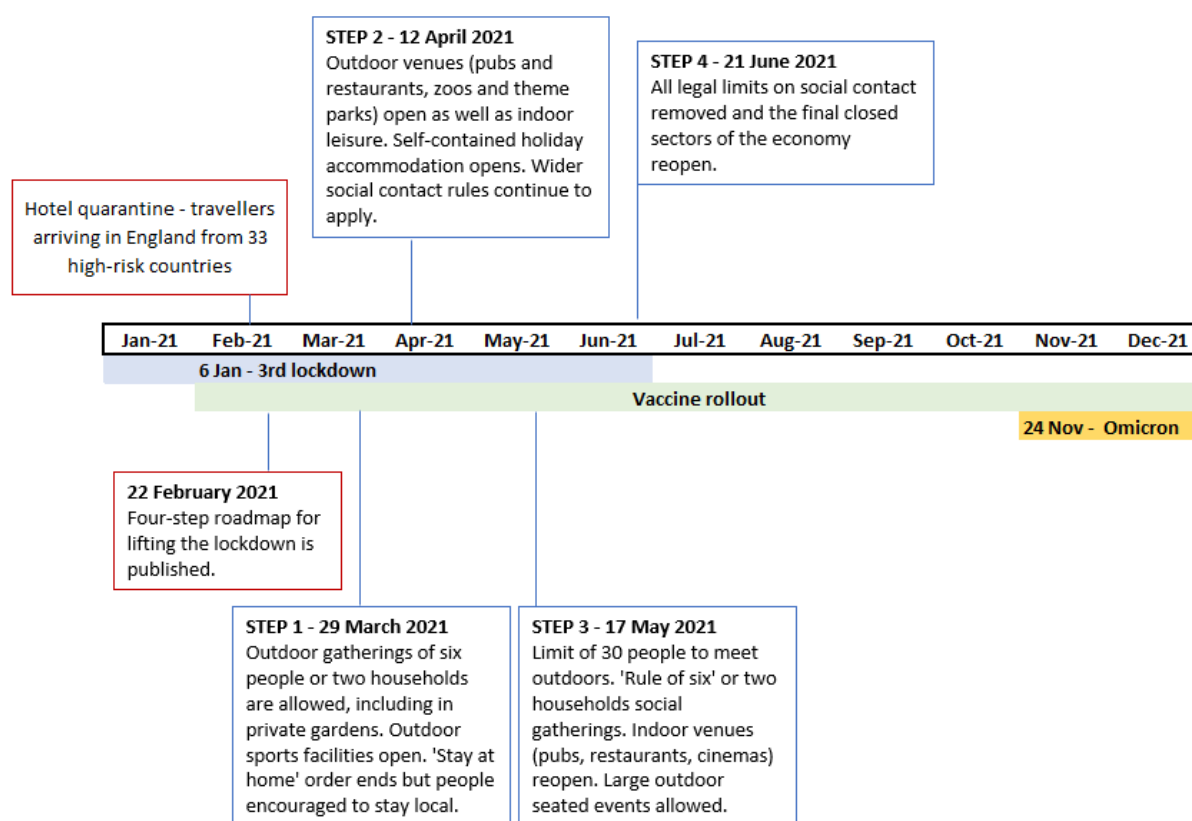
This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2021 and provides comparative data against the previously published data for 2020 as well as providing headline comparisons against 2019 in order to monitor the ongoing impact of the pandemic.

Part of the Interreg Channel EXPERIENCE project, Destination Research was commissioned by Visit Kent to produce 2021 results based on the latest data from national tourism surveys and regionally/locally based data. The results are derived using the Cambridge Economic Impact Model.

In its basic form, the model distributes regional activity as measured in national surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level. Whenever possible, results have been enhanced by building in additional local-level data gathered by the districts.

Summary of national lockdown laws during 2021

Our analysis assumes an initial lockdown starting in January, followed by a four-step roadmap for a gradual lifting of movement and travel restrictions.



Cambridge Model 2021 results – Key methodology changes

The Cambridge Model examines the volume and value of tourism and the impact of that expenditure on the local economy. The model utilises information from national tourism surveys among other sources of information. The main national surveys used as data sources in stage one include:

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

The above reports are not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we usually apply a 3-year rolling average to this data to highlight longer-term trends, whilst helping smooth out short-term market fluctuations and reducing the impact of any methodological changes affecting the survey. For example, published results relating to 2019 were, in fact, an average of 2017, 2018 and 2019 results.

The ongoing Covid-19 pandemic has caused global disruption to the visitor economy with activity re-starting at a slow pace. There is a consensus that tourism recovery will be segmented and gradual. In order to reflect the impact of the pandemic, the 2021 results incorporate the following methodological changes:

- Results for the three key surveys (GBTS, IPS and GBDVS) were suspended in March 2020 because of the coronavirus (Covid-19) pandemic.
- Fieldwork for the GBTS and GBDVS resumed in April 2021 and national-level 2021 data (April – December) will be published during the last quarter of 2022.
- During 2021, the IPS survey restarted at the majority of ports but did not operate at Dover until Q3 and there were no interviews at the Eurotunnel through the entirety of 2021 due to COVID-19 restrictions. Therefore, the published data does not represent the total inbound market for 2021 and is not directly comparable with historical UK total data.
- Therefore, the full 2021 results presented in this report are based on a range of administrative sources, consumer travel insights published by national agencies and modelling work, using the published 2019 Cambridge Model data as a starting point.
- Domestic tourism estimates produced by VisitBritain for each of the four journey purposes for domestic overnight tourism (holidays, business, visiting friends and relatives and miscellaneous journeys), 17 categories of spending for leisure day trips.
- Whenever available, we have included locally sourced data supplied by destinations in our calculations, including (but not limited to) local business performance (e.g. accommodation occupancy), car parking data, annual footfall and visits to visitor attractions.

SEASONALITY: The figures assume a step change in mid-May as restrictions eased, followed by a continued recovery in the summer and autumn. Towards the end of the year there was a dip from late November, intensifying in December, due to the Omicron variant.

TRIPS AND WEIGHTING FACTORS: Our model uses a set of weighting factors to reflect the fact that different journey purposes and trip types recovered at different rates, and there were different patterns of recovery by type of destination. Holidays and trips to friends and family performed above 2019 and 2020 levels whereas business -related visits continued to fall.

Furthermore, urban and coastal resort areas attracted proportionately higher levels of expenditure from day trippers due to the shopping opportunities, whereas countryside, villages and rural coastal areas experienced a proportionately stronger overnight visitor market, due to the availability of self-catering accommodation and the wider offer of socially distanced holidays.

EMPLOYMENT:

The Government's Job Retention Scheme, known as furlough was first launched in April 2020 and lasted until 30 September 2021. Initially, employees continued to receive 80% of current salary for hours not worked, capped at £2,500 per month. From 1 July 2021, the Government paid 70% of wages up to a maximum cap of £2,187.50 for the hours the employee was on furlough. Employers had to top up employees' wages so that they received 80% of their wages (up to £2,500) for the hours they were on furlough. From 1 August 2021, the Government paid 60% of wages up to a maximum cap of £1,875 for the hours the employee was on furlough.

As coronavirus restrictions came to an end, industries in the UK experienced the effects of the pandemic in different ways. Employment fell in the accommodation and food sectors. Data from the Office for National Statistics (ONS) shows that from October to December 2021, employment in the accommodation and food sector was still 11% below pre-pandemic levels.

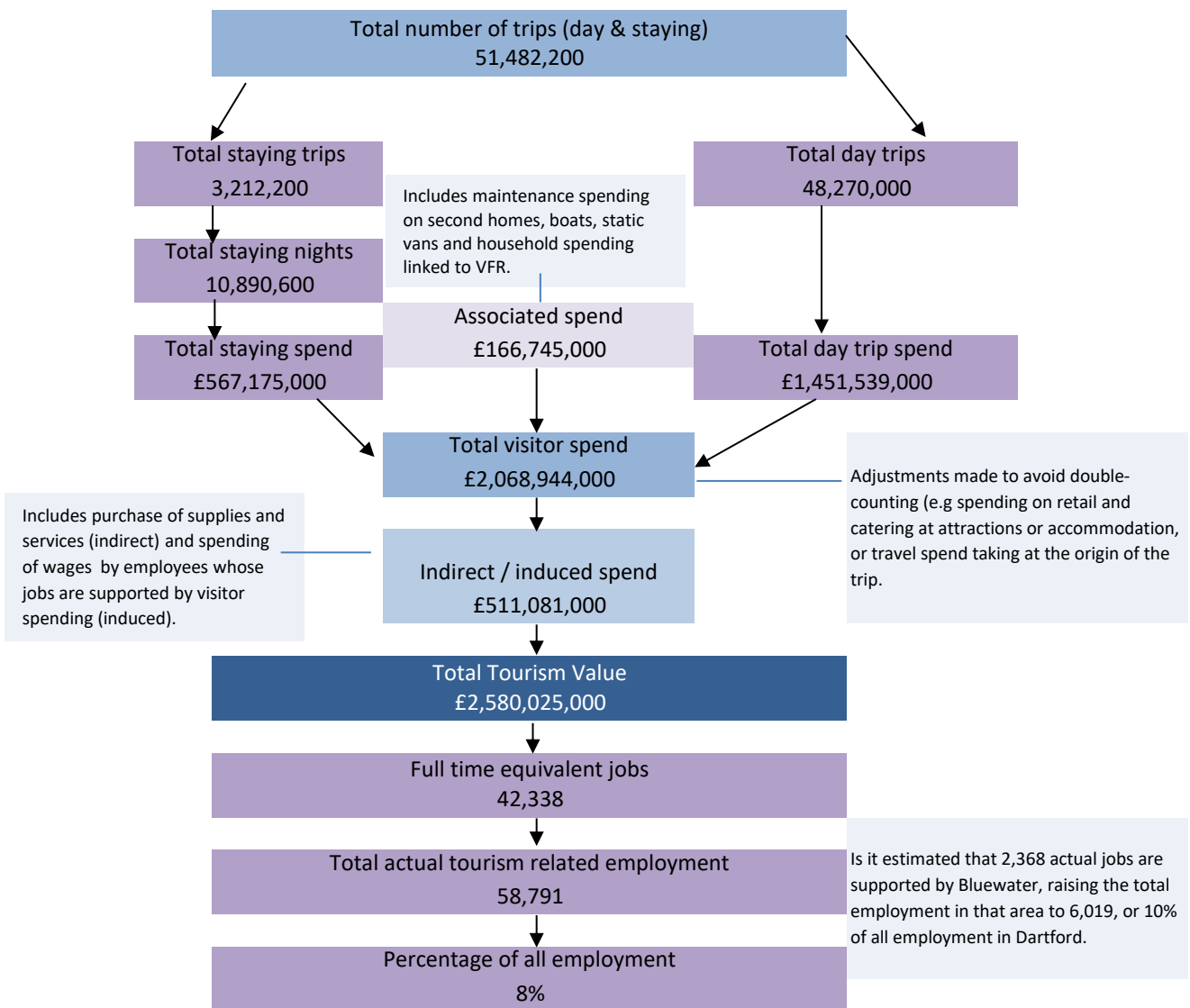
2021 National forecast

As was the case with the 2020 results, the model will make use of the latest forecast from VisitBritain, relating to 2021. This assumes an estimated £16.0bn in domestic overnight tourism spending (64% growth on 2020 and 65% of the 2019 level) and £41.0bn in leisure day trip spending (69% growth on 2020 and 61% of the 2019 level).

Inbound tourism for the full year 2021 is estimated at 6.4 million visits, 42% down on 2020 and 16% of the 2019 level (or 84% down on 2019). Expenditure by inbound visitors reached £5.6bn, 10% down on 2020 and 20% of the 2019 level (or 80% down on 2019).

Economic Impact of Tourism – Headline Figures

Kent - 2021 Results

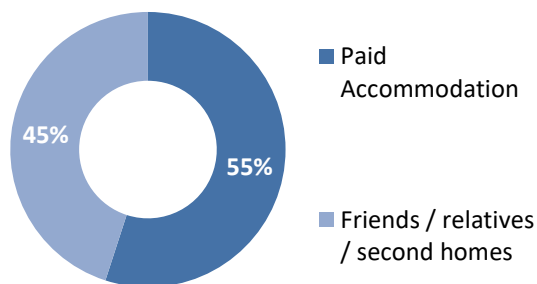


Economic Impact of Tourism – Year on year comparisons				Year-on-year comparison	Pre-pandemic levels
	2021	2020	2019	2021 v 2020	2021 v 2019
Day Trips					
Day trips Volume	48,270,000	31,189,000	61,660,000	55%	-22%
Day trips Value	£1,451,539,000	£884,354,000	£2,249,146,000	64%	-35%
Overnight trips					
Number of trips	3,212,200	2,163,000	4,862,000	49%	-34%
Number of nights	10,890,600	7,173,000	17,156,000	52%	-37%
Trip value	£567,175,000	£355,267,000	£899,379,000	60%	-37%
Total Value	£2,580,025,000	£1,616,140,000	£4,148,318,200	60%	-38%
Actual Jobs	58,791	50,026	81,458	18%	-28%
	2021	2020	2019	2021 v 2020	2021 v 2019
Average length stay (nights x trip)	3.39	3.32	3.53	2.1%	-3.9%
Spend x overnight trip	£176.57	£164.25	£184.98	7.5%	-4.5%
Spend x night	£52.08	£49.53	£52.42	5.2%	-0.7%
Spend x day trip	£30.07	£28.35	£36.48	6.1%	-17.6%

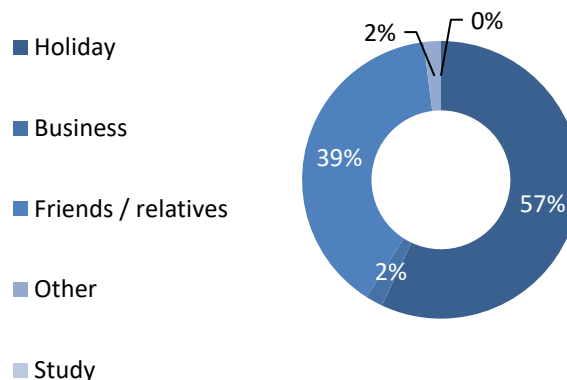
Economic Impact of Tourism – Headline Figures

Kent - 2021 Results

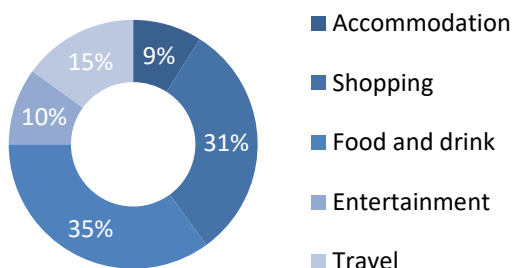
Trips by type of accommodation



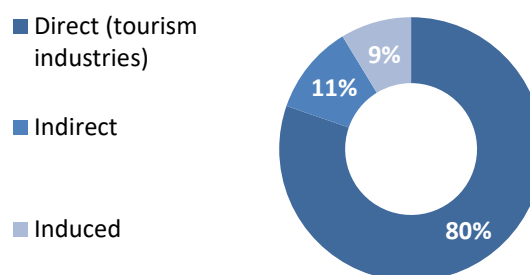
Trips by purpose



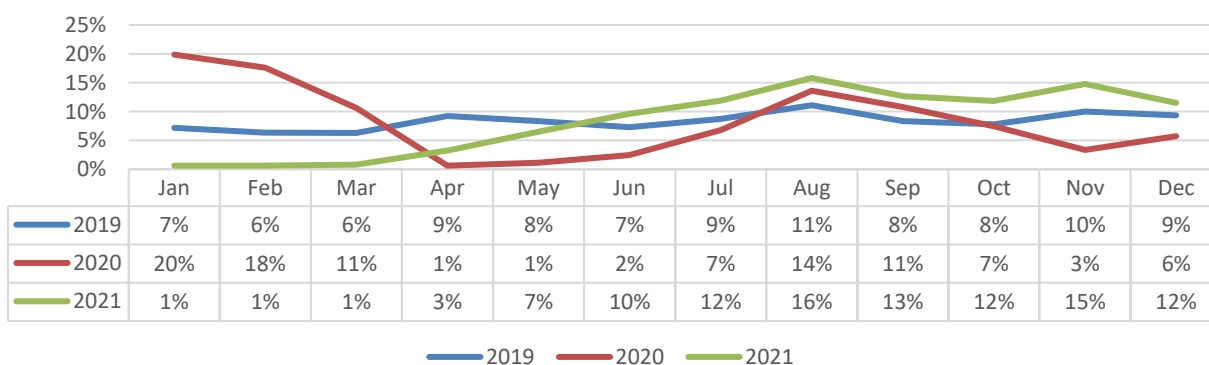
Breakdown of expenditure



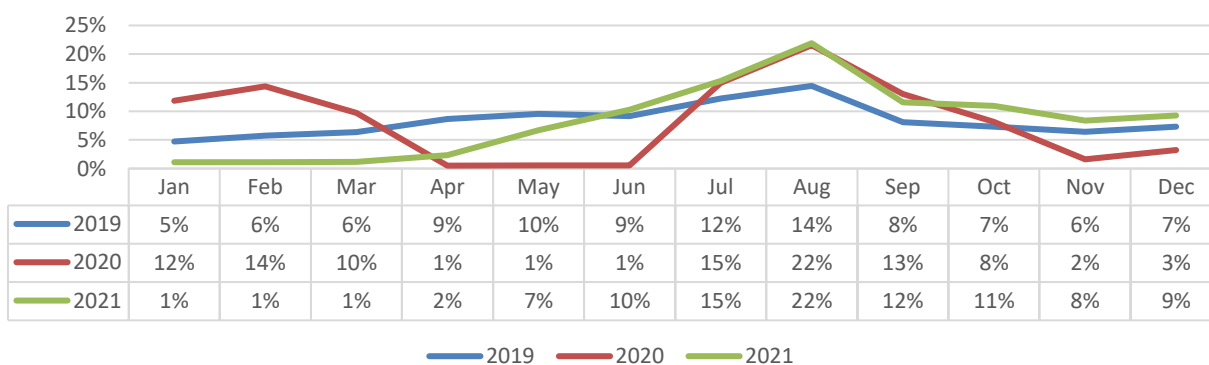
Type of employment



Seasonality - Day trip expenditure



Seasonality - Overnight expenditure



Source: VisitBritain

Volume of Tourism

Staying visits in the county context

Kent - 2021 Results

All figures have been rounded and some tables may show slight discrepancy between totals and sub totals.

Staying trips in the county context	Domestic trips ('000)	Overseas trips ('000)
Ashford	236	27.5
Canterbury	368	48.0
Dartford	111	11.0
Dover	257	23.1
Folkestone & Hythe	282	34.0
Gravesham	104	9.0
Maidstone	229	27.9
Medway	286	31.7
Sevenoaks	137	15.2
Swale	239	19.2
Thanet	291	39.2
Tonbridge and Malling	154	14.9
Tunbridge Wells	196	21.7
Kent	2,890	322.4

Staying nights in the county context	Domestic nights ('000)	Overseas nights ('000)
Ashford	675	118.8
Canterbury	1,136	259.0
Dartford	351	44.8
Dover	778	102.0
Folkestone & Hythe	875	136.0
Gravesham	330	48.0
Maidstone	736	164.0
Medway	996	174.0
Sevenoaks	430	76.0
Swale	962	89.0
Thanet	924	260.0
Tonbridge and Malling	482	69.0
Tunbridge Wells	566	109.0
Kent	9,241	1,649.6

Staying spend in the county context	Domestic spend (millions)	Overseas spend (millions)
Ashford	£42.1	£5.4
Canterbury	£59.5	£13.6
Dartford	£16.9	£2.3
Dover	£48.9	£6.0
Folkestone & Hythe	£53.6	£8.3
Gravesham	£14.8	£2.1
Maidstone	£36.7	£8.1
Medway	£40.8	£8.3
Sevenoaks	£22.0	£4.0
Swale	£35.1	£4.1
Thanet	£51.9	£18.4
Tonbridge and Malling	£22.5	£4.4
Tunbridge Wells	£32.3	£6.0
Kent	£477.1	£90.1

Staying Visitors - Accommodation Type

Kent - 2021 Results

Trips by Accommodation

	UK		Overseas		Total	
Serviced	918,600	32%	134,900	42%	1,053,500	33%
Self catering	223,400	8%	10,600	3%	234,000	7%
Camping	190,200	6%	14,600	4%	204,800	6%
Static caravans	144,000	5%	16,000	5%	160,000	5%
Group/campus	22,000	1%	5,200	2%	27,200	1%
Paying guest	0	0%	1,500	1%	1,500	0%
Second homes	44,400	1%	6,300	2%	50,700	2%
Boat moorings	36,000	1%	0	0%	36,000	1%
Other	46,800	2%	1,800	1%	48,600	2%
Friends & relatives	1,264,400	44%	131,500	40%	1,395,900	43%
Total 2021	2,889,800		322,400		3,212,200	
Comparison 2020	1,774,000		389,000		2,163,000	
Difference	63%		-17%		49%	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	2,346,000	25%	310,100	19%	2,656,100	24%
Self catering	456,000	5%	150,900	9%	606,900	6%
Camping	533,000	6%	51,200	3%	584,200	5%
Static caravans	874,000	9%	29,000	2%	903,000	8%
Group/campus	70,000	1%	38,700	2%	108,700	1%
Paying guest	0	0%	35,000	2%	35,000	1%
Second homes	179,000	2%	48,200	3%	227,200	2%
Boat moorings	270,000	3%	0	0%	270,000	2%
Other	188,000	2%	16,600	1%	204,600	2%
Friends & relatives	4,325,000	47%	969,900	59%	5,294,900	49%
Total 2021	9,241,000		1,649,600		10,890,600	
Comparison 2020	5,071,000		2,102,000		7,173,000	
Difference	82%		-22%		52%	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£263,640,000	55%	£33,403,000	37%	£297,043,000	52%
Self catering	£31,665,000	7%	£6,866,000	8%	£38,531,000	7%
Camping	£13,815,000	3%	£2,200,000	2%	£16,015,000	3%
Static caravans	£28,633,000	6%	£1,653,000	2%	£30,286,000	5%
Group/campus	£1,943,000	1%	£2,113,000	2%	£4,056,000	1%
Paying guest	£0	0%	£2,404,000	3%	£2,404,000	1%
Second homes	£7,151,000	1%	£1,878,000	2%	£9,029,000	2%
Boat moorings	£7,120,000	1%	£0	0%	£7,120,000	1%
Other	£17,030,000	4%	£1,551,000	2%	£18,581,000	3%
Friends & relatives	£106,088,000	22%	£38,022,000	42%	£144,110,000	25%
Total 2021	£477,085,000		£90,090,000		£567,175,000	
Comparison 2020	£241,985,000		£113,282,000		£355,267,000	
Difference	97%		-20%		60%	

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 - 2021 Results

Trips by Purpose

	UK		Overseas		Total	
Holiday	1,762,800	61%	74,200	23%	1,837,000	57%
Business	28,900	1%	22,500	7%	51,400	2%
Friends & relatives	1,040,300	36%	203,100	63%	1,243,400	39%
Other	57,800	2%	12,900	4%	70,700	2%
Study	0	0%	9,700	3%	9,700	0%
Total	2021	2,889,800		322,400		3,212,200
Comparison	2020	1,774,000		389,000		2,163,000
Difference		63%		-17%		49%

Nights by Purpose

	UK		Overseas		Total	
Holiday	6,469,000	70%	263,900	16%	6,732,900	62%
Business	92,000	1%	49,500	3%	141,500	1%
Friends & relatives	2,495,000	27%	1,105,200	67%	3,600,200	33%
Other	185,000	2%	99,000	6%	284,000	3%
Study	0	0%	132,000	8%	132,000	1%
Total	2021	9,241,000		1,649,600		10,890,600
Comparison	2020	5,071,000		2,102,000		7,173,000
Difference		82%		-22%		52%

Spend by Purpose

	UK		Overseas		Total	
Holiday	£376,897,000	79%	£18,919,000	21%	£395,816,000	70%
Business	£9,542,000	2%	£2,703,000	3%	£12,245,000	2%
Friends & relatives	£66,792,000	14%	£54,054,000	60%	£120,846,000	21%
Other	£23,854,000	5%	£8,108,000	9%	£31,962,000	6%
Study	£0	0%	£6,306,000	7%	£6,306,000	1%
Total	2021	£477,085,000		£90,090,000		£567,175,000
Comparison	2020	£241,985,000		£113,282,000		£355,267,000
Difference		97%		-20%		60%

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	168.7	Germany	£48.56
France	107.7	USA	£36.25
Netherlands	85.5	France	£23.61
Poland	76.5	Australia	£17.85
USA	70.9	Netherlands	£15.52
Spain	63.8	Spain	£13.31
Belgium	51.9	Switzerland	£13.13
Romania	51.6	Belgium	£11.78
Other Eastern Europe	44.1	Italy	£11.17
Irish Republic	33.1	Qatar	£10.11

Source: International Passenger Survey, 2017-2019

Domestic Overnight Visitors - Purpose of Trip

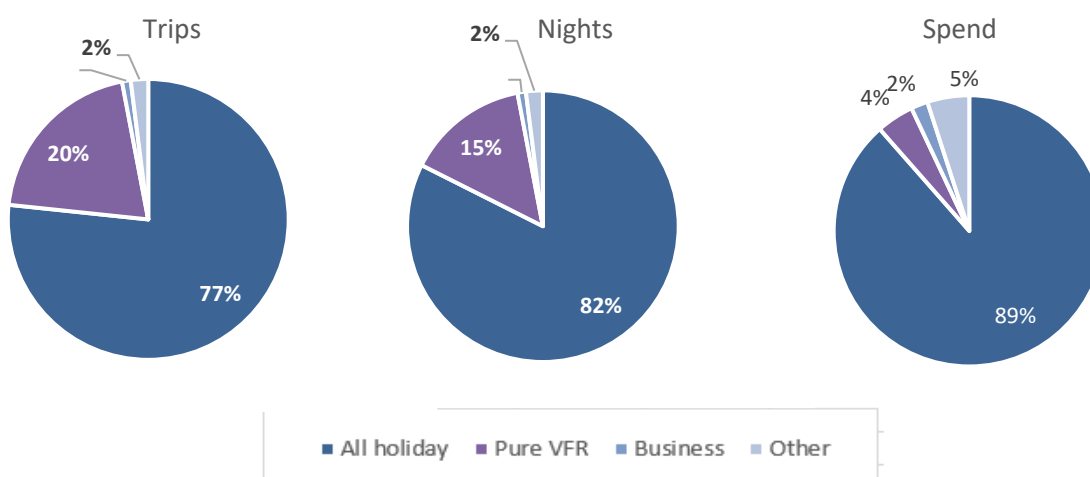
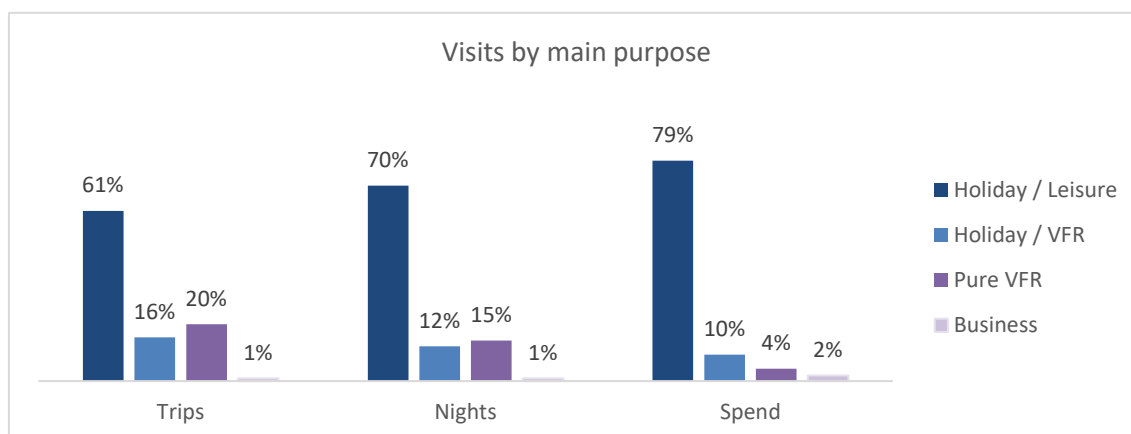
Kent - 2021 Results

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	1,762,800	61%	6,469,000	70%	£376,897,000	79%
Holiday / VFR	453,000	16%	1,148,000	12%	£45,419,000	10%
Pure VFR	587,770	20%	1,347,300	15%	£21,373,440	4%
Business	28,900	1%	92,000	1%	£9,542,000	2%
Other	57,800	2%	185,000	2%	£23,854,000	5%
Total	2,889,800		9,241,000		£477,085,000	

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)	3.7	2.5	2.3	3.2
Spend x overnight trip	£213.81	£100.26	£36.36	£330.17
Spend x night	£58.26	£39.56	£15.86	£103.72



Day Visitors

Kent - 2021 Results

Total Volume and Value of Day Trips

		Trips		Spend	
Urban visits		21,123,000	44%	£765,110,000	53%
Countryside visits		14,712,000	30%	£403,590,000	28%
Coastal visits		12,435,000	26%	£282,839,000	19%
Total	2021	48,270,000	100%	£1,451,539,000	100%
Comparison	2020	31,189,000		£884,354,000	
Difference		55%		64%	

Day Visitors in the county context

District	Day Visits (millions)	Day Visit Spend (millions)
Ashford	3.1	£99.5
Canterbury	6.8	£184.8
Dartford	6.2	£211.4
Dover	3.7	£99.6
Folkestone & Hythe	4.0	£107.3
Gravesham	1.4	£37.4
Maidstone	3.0	£100.8
Medway	3.2	£102.7
Sevenoaks	3.2	£109.2
Swale	4.3	£108.0
Thanet	3.6	£98.9
Tonbridge and Malling	2.4	£77.5
Tunbridge Wells	3.3	£114.7
Kent	48.3	£1,451.5

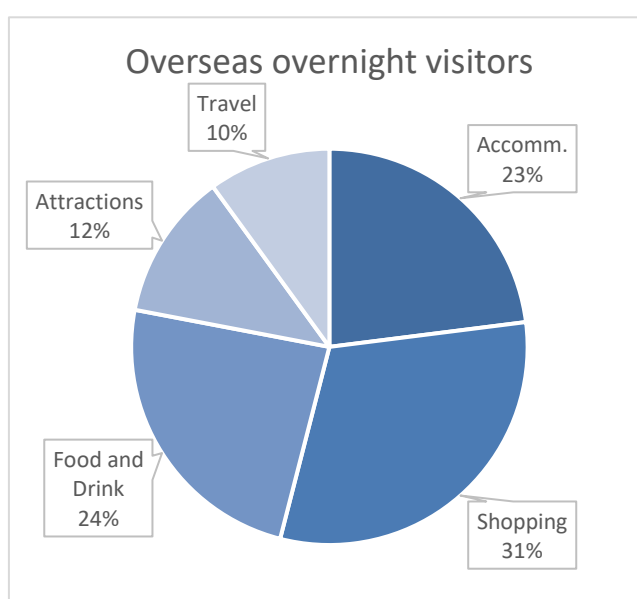
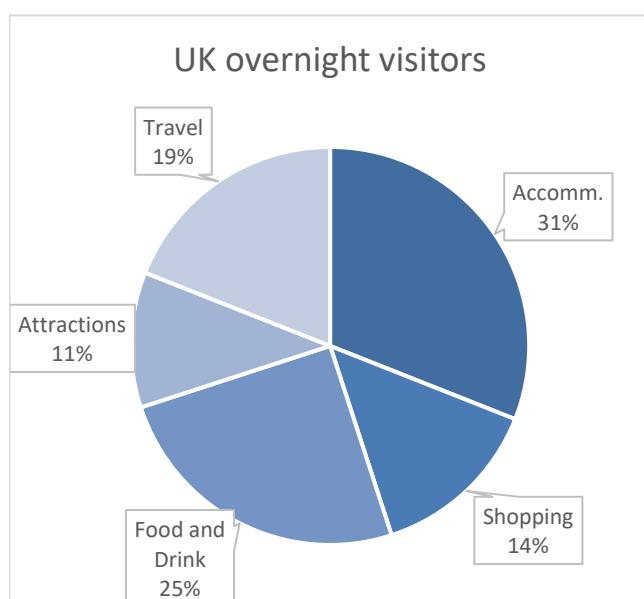
Value of Tourism

Expenditure Associated with Trips

Kent - 2021 Results

Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK visitors	£147,896,400	£66,791,700	£119,271,300	£52,479,400	£90,646,200	£477,085,000
Overseas visitors	£20,720,700	£27,927,900	£21,621,600	£10,810,800	£9,009,000	£90,090,000
Total Staying	£168,617,100	£94,719,600	£140,892,900	£63,290,200	£99,655,200	£567,175,000
Total Staying (%)	30%	17%	25%	11%	17%	100%
Total Day Visitors	£0	£537,069,400	£566,100,200	£145,153,900	£203,215,500	£1,451,539,000
Total Day Visitors (%)	0%	37%	39%	10%	14%	100%
Total 2021	£168,617,100	£631,789,000	£706,993,100	£208,444,100	£302,870,700	£2,018,714,000
%	9%	31%	35%	10%	15%	100%
Comparison 2020	£101,296,000	£338,546,000	£466,001,000	£129,947,000	£203,831,000	£1,239,621,000
Difference	66%	87%	52%	60%	49%	63%



Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	Boats	Static vans	Friends & relatives	Total
£2,918,000	£2,735,000	£83,000	£161,009,000	£166,745,000

Spend on second homes is assumed to be an average of £2,050 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,050 on berthing charges, servicing and maintenance and upgrading of equipment. Static van spend arises in the case of vans purchased by the owner and used as a second home. Expenditure is incurred in site fees, utility charges and other spending and is estimated at £2,050. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £185 per visit has been assumed based on national research for social and personal visits.

Direct Turnover Derived From Trip

Kent - 2021 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		£170,463,000	£13,435,000	£183,898,000
Retail		£93,519,000	£534,053,000	£627,572,000
Catering		£137,442,000	£541,208,000	£678,650,000
Attractions		£68,077,000	£164,226,000	£232,303,000
Transport		£58,889,000	£120,887,000	£179,776,000
Non-trip spend		£166,745,000	£0	£166,745,000
Total Direct	2021	£695,135,000	£1,373,809,000	£2,068,944,000
Comparison	2020	£441,978,000	£828,447,000	£1,270,425,000
Difference		57%	66%	63%

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		£77,235,000	£187,171,000	£264,406,000
Non trip spending		£24,720,000	£0	£24,720,000
Income induced		£80,646,000	£141,309,000	£221,955,000
Total	2021	£182,601,000	£328,480,000	£511,081,000
Comparison	2020	£122,132,000	£223,583,000	£345,715,000
Difference		50%	47%	48%

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		£695,135,000	£1,373,809,000	£2,068,944,000
Indirect		£182,601,000	£328,480,000	£511,081,000
Total Value	2021	£877,736,000	£1,702,289,000	£2,580,025,000
Comparison	2020	£564,110,000	£1,052,030,000	£1,616,140,000
Difference		56%	62%	60%

Employment

Employment

Kent - 2021 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 £48,600 increase in tourism revenue.

Direct employment

Full time equivalent (FTE)						
	Staying Visitors		Day Visitor		Total	
Accommodation	3,476	29%	262	1%	3,738	12%
Retailing	1,124	9%	6,159	31%	7,283	23%
Catering	2,665	22%	10,381	51%	13,046	40%
Entertainment	922	8%	2,162	11%	3,084	9%
Transport	611	5%	1,216	6%	1,827	6%
Non-trip spend	3,294	27%	0	0%	3,294	10%
Total FTE	2021	12,092	20,180		32,272	
Comparison	2020	10,401	17,946		28,347	
Difference		16%	12%		14%	
Estimated actual jobs						
	Staying Visitors		Day Visitor		Total	
Accommodation	5,138	30%	385	1%	5,523	12%
Retailing	1,689	10%	9,181	31%	10,870	23%
Catering	4,017	23%	15,467	52%	19,484	41%
Entertainment	1,318	7%	3,047	10%	4,365	9%
Transport	871	5%	1,719	6%	2,590	6%
Non-trip spend	4,378	25%	0	0%	4,378	9%
Total Actual	2021	17,411	29,799		47,210	
Comparison	2020	14,813	26,504		41,317	
Difference		18%	12%		14%	

Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitors	Day Visitors	Total
Indirect jobs	1,970	3,640	5,610
Induced jobs	1,616	2,840	4,456
Total FTE	2021	3,586	6,480
Comparison	2020	2,662	4,914
Difference		35%	32%
			33%
Estimated actual jobs			
	Staying Visitors	Day Visitors	Total
Indirect jobs	2,310	4,157	6,467
Induced jobs	1,883	3,231	5,114
Total Actual	2021	4,193	7,388
Comparison	2020	3,103	5,606
Difference		35%	32%
			33%

Total Tourism Jobs

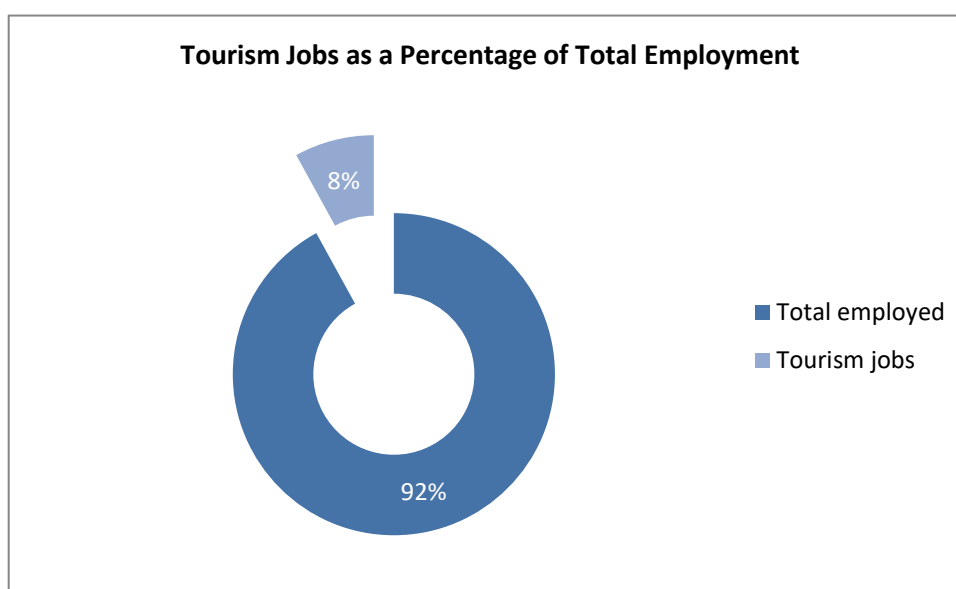
Kent - 2021 Results

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	12,092	77%	20,180	76%	32,272	76%
Indirect	1,970	13%	3,640	14%	5,610	13%
Induced	1,616	10%	2,840	10%	4,456	11%
Total FTE	2021	15,678		26,660		42,338
Comparison	2020	13,062		22,860		35,922
Difference		20%		17%		18%
Estimated actual jobs						
	Staying Visitors		Day Visitor		Total	
Direct	17,411	80%	29,799	80%	47,210	80%
Indirect	2,310	11%	4,157	11%	6,467	11%
Induced	1,883	9%	3,231	9%	5,114	9%
Total Actual	2021	21,604		37,187		58,791
Comparison	2020	17,916		32,110		50,026
Difference		21%		16%		18%

Tourism Jobs as a Percentage of Total Employment (*)

	Staying Visitors	Day visitors	Total
Total employed	708,692	708,692	708,692
Tourism jobs	21,604	37,187	58,791
Proportion all jobs	3.0%	5.0%	8.0%
Comparison	2020	32,110	50,026
Difference	21%	16%	18%



(*) Is it estimated that 2,368 actual jobs are supported by Bluewater, raising the total employment in that area to 6,019, or 10% of all employment in Dartford.

The key 2021 results of the Economic Impact Assessment are:

51.5 million trips were undertaken in the area

48.3 million day trips

3.2 million overnight visits

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

£2,069 million spent by tourists during their visit to the area

£172 million spent on average in the local economy each month.

£567 million generated by overnight visits

£1,452 million generated from day trips.

£2,580 million spent in the local area as result of tourism, taking into account multiplier effects.

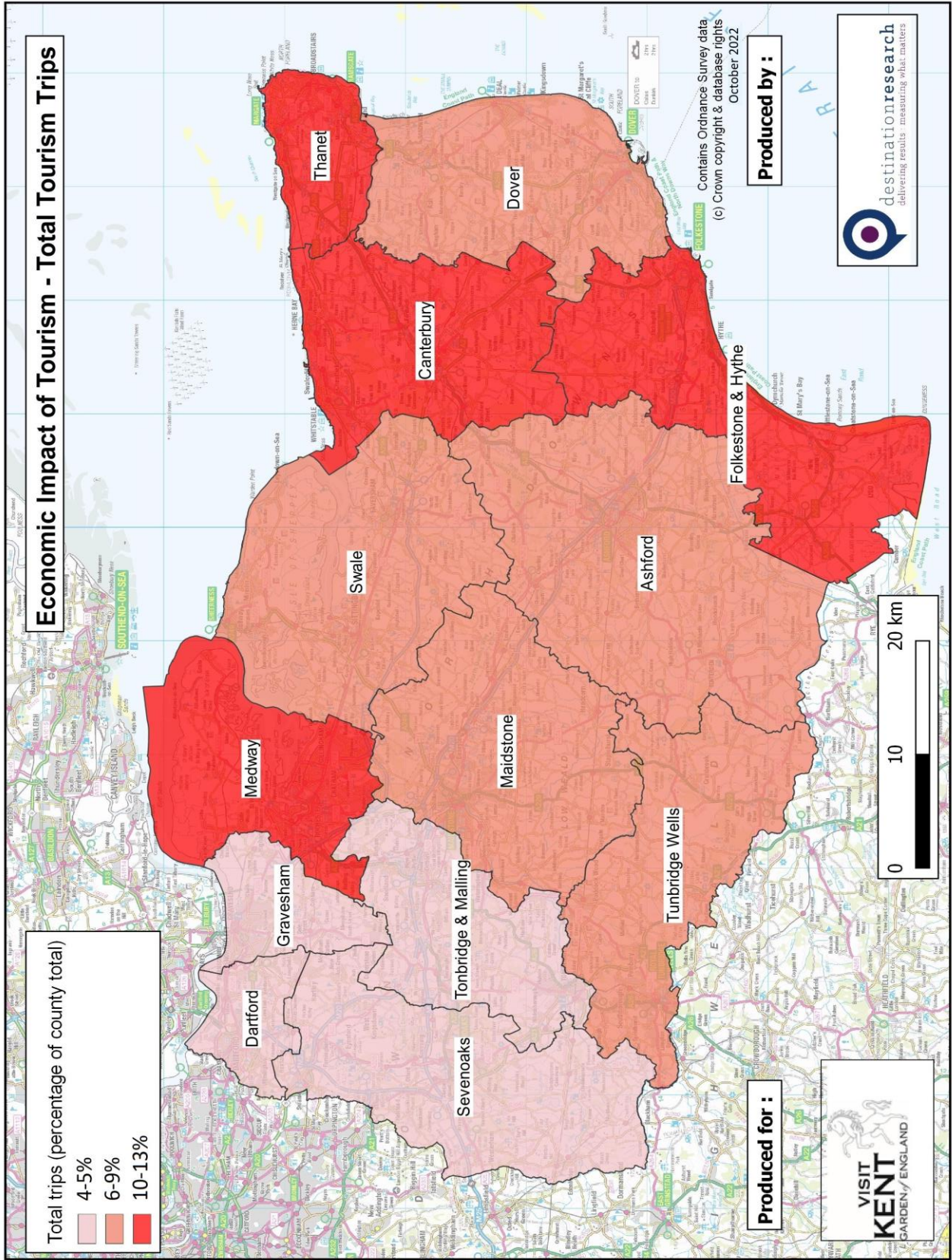
58,791 jobs supported, both for local residents and from those living nearby.

47,210 tourism jobs directly supported

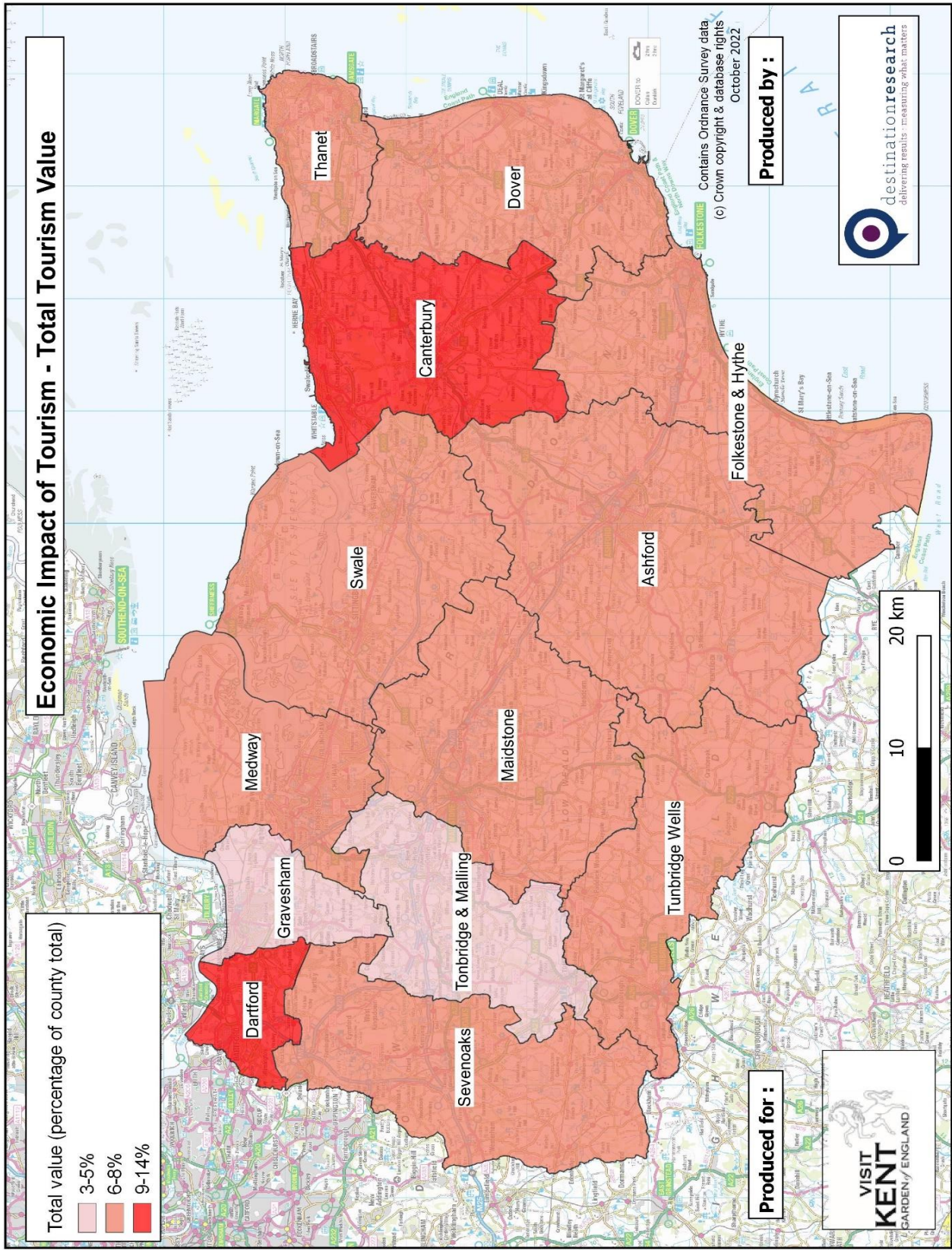
11,581 non-tourism related jobs supported linked to multiplier spend from tourism.

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

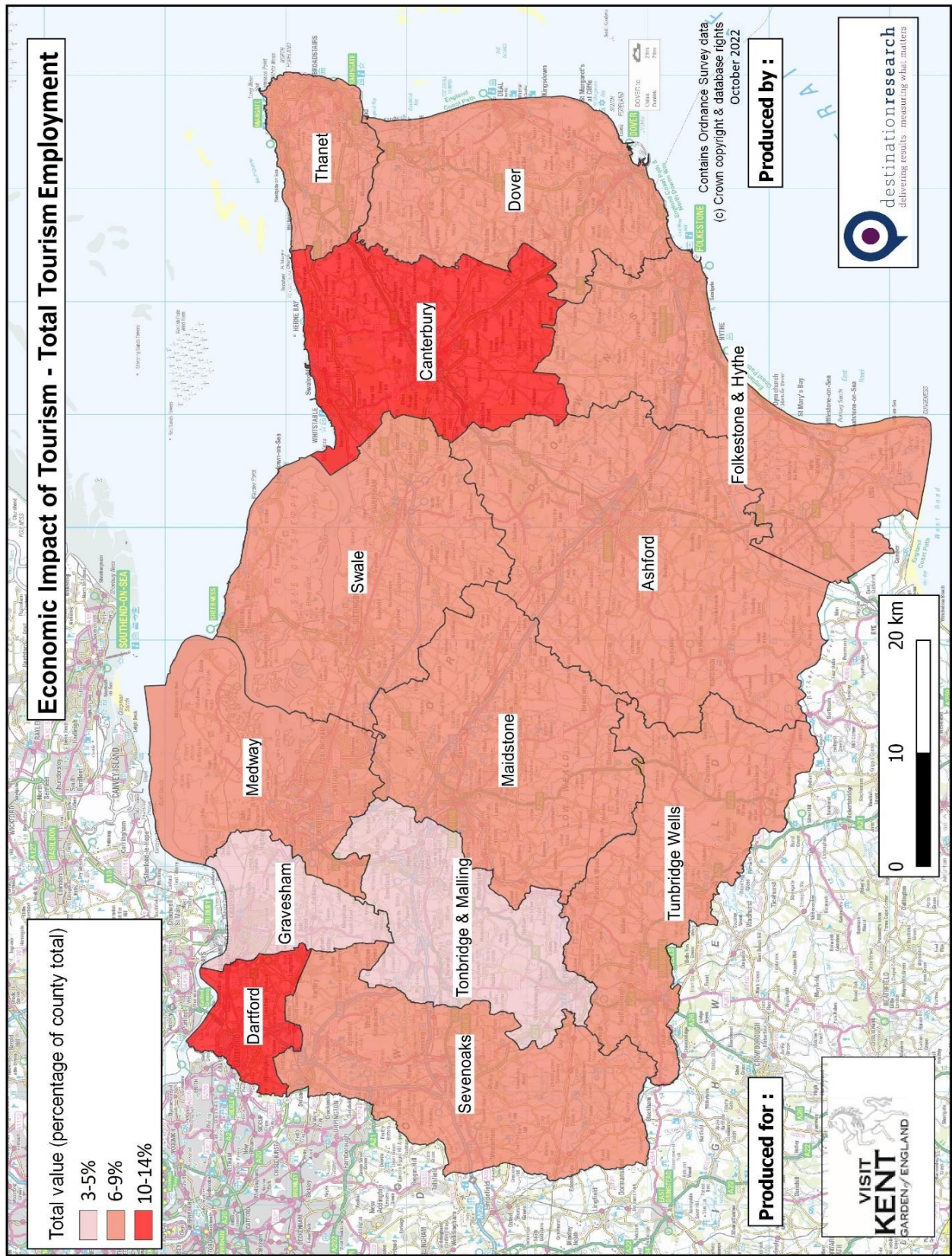
Thematic maps - Total Volume of Trips



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;
- Latest estimates of resident population as based on the 2011 Census of Population;
- Selected data from the 2011 Census of Employment;
- Selected data on the countryside and coast including national designations and length of the coastline.

Staying Visitors

The GBTS provides information on the total number of trips to the region and the relative proportions using different types of accommodation. By matching these figures to the supply of such accommodation, the regional average number of trips per bedspace or unit of accommodation can be derived. The IPS provides information on the total number of trips by overseas visitors to the region. The model uses three year rolling averages to reduce extreme highs and lows which are due to small sample sizes, rather than being a reflection on drastic changes in demand year-on-year.

Day Visitors

Information on day trips at the regional level is available from the Day Visits in Great Britain survey (GBDVS). A day visitor is defined as someone making a day trip to and from home for leisure purposes. The report excludes trips undertaken for business or study purposes. This report presents data on those who took trips of at least 3 hours duration on an irregular basis as defined by the GBDVS. These are identified as tourism day trips by the Department for Digital, Culture, Media and Sport

Impact of tourism expenditure

This section examines the impact of the tourism expenditure in terms of the direct, indirect and induced expenditure as well as an estimate of the actual jobs (both direct and indirect) supported by tourism expenditure in the county.

The GBTS, IPS and Day Visits to Great Britain survey data on the breakdown of visitor spending. The impact of this initial round of expenditure will be subsequently increased by multiplier effects. These arise from the purchase of supplies and services by the businesses in receipt of visitor expenditure (indirect impacts), and by the income induced-effects arising from the spending of wages by employees in the first round of business and in subsequent expenditure in supplier business (induced impacts).

The New Earnings Survey which provides information on wage levels by industry sector and region; An internal business database which includes data on the structure of business expenditure, local linkages and multiplier ratios drawn from a wide range of business and economic studies carried out by Geoff Broom Associates, PA Cambridge Economic Consultants and others. By applying the breakdown to the estimates of visitor spending, the model generates estimates of total direct spending.

Evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover – for example, some expenditure on food and drink actually takes place in inns and hotels that fall in the accommodation sector and within attractions. More significantly, expenditure on travel costs associated with individual trips is equally likely to take place at the origin of the trip as the destination. Therefore, the model assumes that only 40% of travel expenditure accrues to the destination area.

Number of full time job equivalents

Having identified the value of turnover generated by visitor spending, it is possible to estimate the employment associated with that spending. Wages for staff and drawings for the proprietors will absorb a proportion of that turnover. By applying these proportions to the overall additional turnover in each sector, the amount of money absorbed by employment costs can be calculated. The New Earnings Survey provides data from which the average costs by business sector, adjusted to take account of regional differences, can be calculated.

After allowing for additional costs such as National Insurance and pension costs, an average employment cost per full time equivalent job can be estimated. The number of such jobs in the local area can then be estimated by dividing the amount of business expenditure on wages and drawings by the average employment cost per job.

Number of Actual Jobs

The model generates estimates of full time equivalent jobs based on visitor spending. However, the total number of actual jobs will be higher when part time and seasonal working is taken into account. The full time equivalent jobs arising directly from visitor spending are converted into actual jobs using information from business surveys in the sectors receiving visitor spending (principally accommodation, food and drink, retail, attractions, transport). In general, the conversion factor between full time equivalent jobs and actual jobs varies around 1.5 in those sectors.

The indirect and induced jobs arise across a much wider range of employment sectors. Therefore, the average 1.16 for all sectors based on Census of Employment data has been used to convert full time equivalent jobs in this sector to actual jobs.

The employment estimates generated by the model include both self-employed and employed people supported by visitor expenditure. The model also includes an estimate of the additional jobs arising in the attractions sector, which are not related to visitor expenditure. However, the numbers do not include other tourism-related employment such as jobs in local authorities arising from their tourism functions, e.g. tourist information staff, additional public health, parks and gardens, public conveniences, maintenance sections and jobs arising from capital investment in tourism facilities.

Local level data for Kent EIA Reports 2021

The Cambridge Model allows for the use of local visitor related data. Local data from visitor surveys and other sources is not always sufficiently detailed or available regularly enough to make the results consistent. We rely on partners to collect additional locally sourced data to feed into the model. We have also used data from the NCTA Business Survey, Visit Kent's accommodation audit and, the Visit Kent's Business Barometer and headline STR figures (monthly/yearly occupancy and supply and demand).

KENT

- Kent Accommodation Study (2020)
- Airdna data – Kent level
- Visit Kent Perception Research
- Annual Visit Kent Business Barometer, 2019 and 2020
- 2021 Visit Kent Barometer footfall
- Port of Dover, Eurotunnel and Eurostar performance

Ashford

- Footfall Data for Park Mall Shopping Centre and Elwick Place Shopping Centre
- Ashford town centre footfall
- Car parking data for both Ashford and Tenterden
- Hampton by Hilton Hotel opened in Sept 2021 in Ashford Town Centre (140-bedroom hotel).

Canterbury

- Canterbury BID - Monthly footfall rates (year-on-year)
- Car Parking Figures (year-on-year)
- City Centre Performance reports
- Hampton by Hilton Hotel (129 beds)

Dartford

- Landsec Annual Report 2021,
- Dartford & Ebbsfleet Retail and Leisure Study, 2021

Dover

- Spectator admissions at the 149th Open
- Opening of the Travelodge in Sandwich (75 bedrooms)
- Cruise activity
- Footfall counters in Dover, Deal and Sandwich
- National Trust footfall counters
- Car parking figures 2020/2021

Gravesham

- Gravesend Town Centre Annual Footfall
- Gravesend Town Centre Council Car Parks data

Maidstone

- Maidstone Town Centre footfall 2019-2021
- Local Event Data Maidstone 2021

Sevenoaks

- Pedestrians from gates into Knole Park

Swale

- Footfall count Parking Spaces Count (Faversham, Sheerness, Sittingbourne, Leysdown Beach, Minster Beach and Sheerness Beach).
- Parking data (transactions and income) - Faversham, Sheppey, Sittingbourne
- Christmas events footfall

Thanet

- Business Barometer Survey for Tourism and Hospitality Industry (Coastal / COVID-19) - Winter 2021 wave, March 2021 wave, June 2021 wave and Autumn 2021 wave.
- Rail passenger numbers (Ramsgate, Broadstairs and Margate stations)
- Port of Ramsgate – number of visiting vessels & number of visitor nights

Tunbridge Wells

- 2021 visitor numbers for Cranbrook Museum, Spa Valley Railway and Spa Hotel (Hotel, events, restaurant and Spa).



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