Commissioned by:

Economic Impact of Tourism

Swale - 2020 Results

January 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 2020 and provides comparative data against the previously published data for Kent (2019).

Part of the Interreg Channel EXPERIENCE project, Destination Research was commissioned by Visit KentKent, in partnership with Swale Borough Council, to produce 2020 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. See Appendix I for further details.

Contextual analysis

Covid-19: Summary of national lockdown laws between March and December 2020.

- **Phase one: first national lockdown -** England was in national lockdown between late March and June 2020. Non-essential shops re-opened on 15 June.
- **Phase two: minimal lockdown restrictions -** Most lockdown restrictions were lifted on 4 July. The Eat Out to Help Out scheme was introduced on 3 August.
- **Phase three: reimposing restrictions -** On 14 September, England's gathering restriction was tightened. People were once again prohibited from meeting more than six people socially. There is a return to working from home and a 10pm curfew for the hospitality sector.
- **Phase four: second national lockdown -** A new-three-tier system of restrictions begins on 14 October and, on 5 November, national restrictions were reintroduced in England.
- **Phase five: reintroducing a tier system -** On 2 December, the tier system was reintroduced. Tier 4 restrictions come into force in London and parts of the Southeast on 21 December.

Covid-19 – Summary of impacts on the visitor economy for 2020

- Our analysis assumes a ten-week lockdown ending at the start of July and with very limited activity. It then assumes a period in July – September when businesses start to open but social distancing remains in place and tourism spend remains well below pre-COVID levels, dipping again in November.
- Parts of the tourism industry reopened in time for the main summer school holiday window, from late July through to early September, picking up on the shoulder months of late September through to the end of October, including the October half term.

Cambridge Model 2020 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 2020 results will incorporate the following methodological changes:

- The 2020 results for the three key surveys (GBTS, IPS and GBDVS) were suspended in March 2020 because of the coronavirus (Covid-19) pandemic. No data was collected for the period when the surveys were not operational.
- The full 2020 results presented in this report are based on a range of administrative sources and modelling work, using the published 2019 Cambridge Model data as a starting point.
- Locally sourced data supplied by destinations including (but not limited to) local business performance (e.g. accommodation occupancy), car parking data, annual footfall and visits to visitor attractions).
- Consumer travel insights published by STR, Deloitte, CBI and Oxford / Tourism Economics.
- 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.
- Overseas visits estimates based on results of the International Passenger Survey (IPS), published by the ONS (Office for National Statistics) as well as additional administrative sources and modelling work carried out by VisitBritain.

Additional Methodology Changes

SEASONALITY: The Cambridge Model template produces annual (calendar year) results. Additional template development work will be required to add a monthly breakdown analysis. Based on a multi-year seasonality analysis data from the key surveys (GBTS, IPS and GBDVS), our modelling will assume a level of tourism activity on a monthly basis depending on the type of destination. Coastal destinations are likely to be affected by higher levels of seasonality compared to rural destinations. Urban areas will be the least affected by seasonality.

TRIPS AND WEIGHTING FACTORS: Our model uses a set of weighting factors to reflect the fact that urban areas attracted proportionately higher levels of expenditure from day trippers due to the shopping opportunities, whereas coastal and rural areas experienced an increase in the proportion of all visits compared to 2019, but lower levels of spend, and a proportionately stronger overnight visitor market, due to the availability of self-catering accommodation and the wider offer of socially distanced holidays.

INTERVENTIONS: Our assessment will take into account the impact of interventions such as the 'eat out to help out' scheme, the visit local / shop local campaign or the 'We're Good to Go' assurance scheme. However, please note that due to limited sources of information available to us our assessment will not be detailed enough to identify specific effects to the results that can be directly attributable to the above interventions.

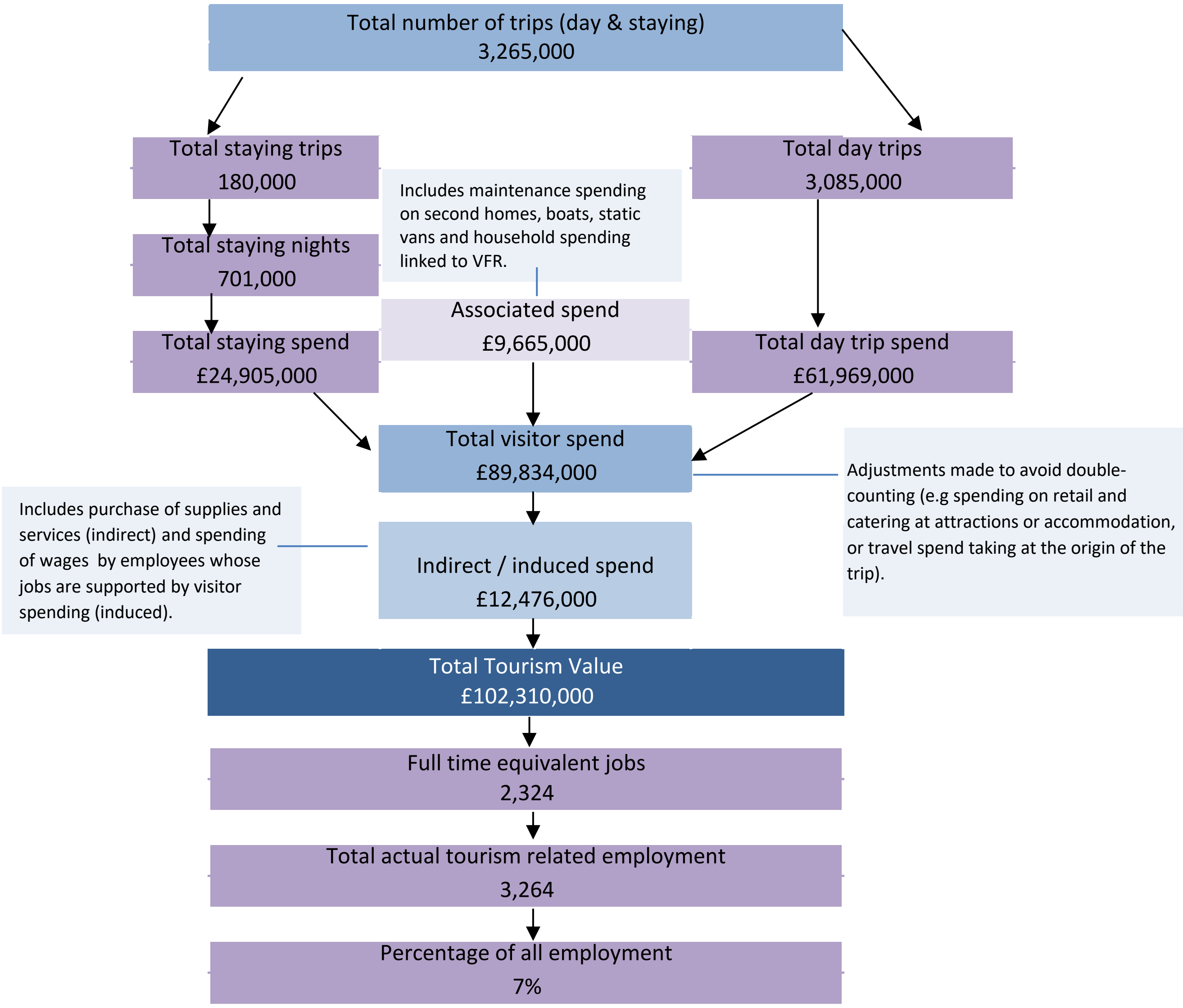
EMPLOYMENT: Our model assumes that a proportion of employment may have been retained through the Government's Job Retention Scheme, known as furlough. Under the furlough scheme employees continued to receive 80% of current salary for hours not worked, capped at £2,500 per month. The furlough scheme was first launched in April 2020. A more "flexible furloughing" system was started at the beginning of July 2020, continuing until the end of the year, which allowed employers to bring furloughed employees back to work part-time.

2020 National forecast

According to VisitBritain estimates, spending by domestic tourism in Britain in 2020 reached £34.0 billion (down 63% compared to 2019). The drop in expenditure is based on a decline of 60% for overnights and 64% for leisure day trips, although with different patterns throughout the year and by journey purpose.

According to these estimates, the UK received 11.1 million inbound visits in 2020, a 73% decline from the visit levels seen in 2019. In 2020 inbound visitors to the UK spent a total of £6.2 billion, a decline of 78% on 2019 results.

Economic Impact of Tourism – Headline Figures Swale - 2020 Results



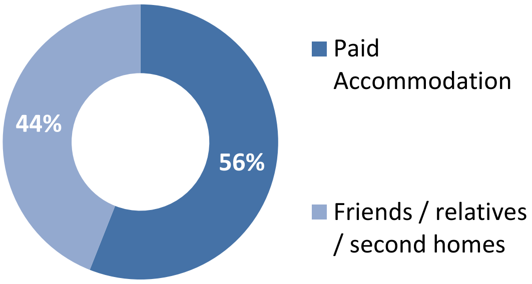
Economic Impact of Tourism – year on year comparisons **Swale**

Day Trips	2019	2020	Annual variation
Day trips volume	4,994,000	3,085,000	-38.2%
Day trips value	£156,793,000	£61,969,000	-60.5%
Overnight trips			
Number of trips	395,000	180,000	-54.4%
Number of nights	1,526,000	701,000	-54.1%
Trip value	£55,860,000	£24,905,000	-55.4%
Total value	£262,675,000	£102,310,000	-61.1%
Actual jobs	5,307	3,264	-38.5%

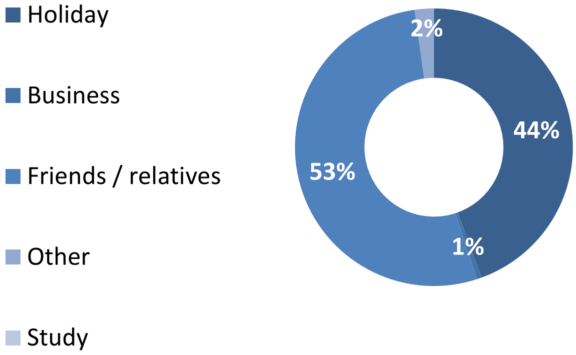
Swale	2019	2020	Variation
Average length stay (nights x trip)	3.86	3.89	0.8%
Spend x overnight trip	£ 141.35	£ 138.36	-2.1%
Spend x night	£ 36.61	£ 35.53	-2.9%
Spend x day trip	£ 31.40	£ 20.09	-36.0%

Economic Impact of Tourism – Headline Figures   Swale - 2020 Results

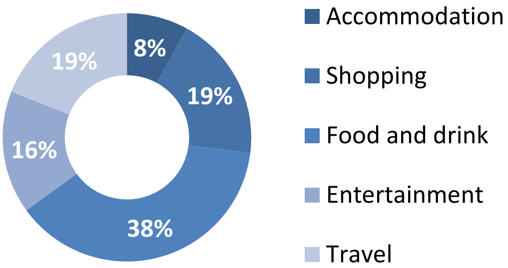
Trips by type of accommodation



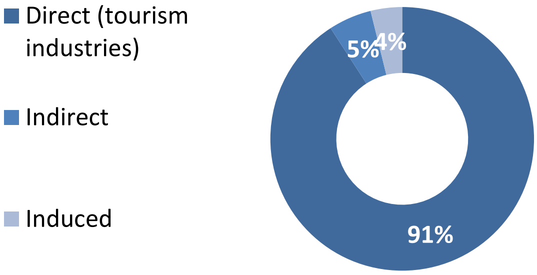
Trips by Purpose



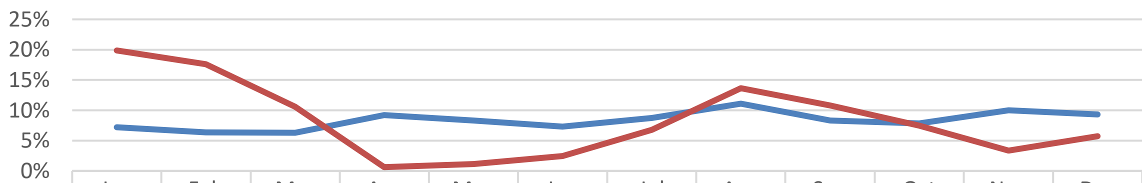
Breakdown of Expenditure



Type of Employment



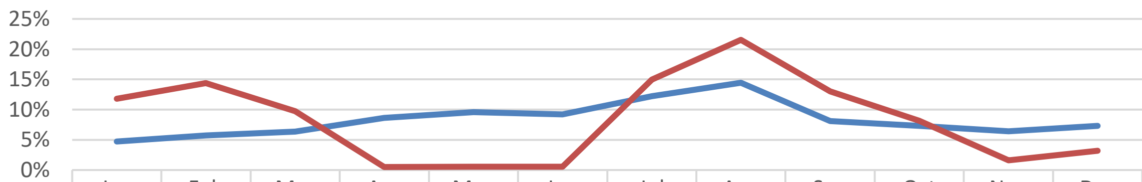
Seasonality - Day trip expenditure (England)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	7%	6%	6%	9%	8%	7%	9%	11%	8%	8%	10%	9%
2020	20%	18%	11%	1%	1%	2%	7%	14%	11%	7%	3%	6%

2019 2020

Seasonality - Overnight expenditure (England)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	5%	6%	6%	9%	10%	9%	12%	14%	8%	7%	6%	7%
2020	12%	14%	10%	1%	1%	1%	15%	22%	13%	8%	2%	3%

2019 2020

Source: VisitBritain

Volume of Tourism

Staying visits in the county context

Staying trips in the county context	Domestic trips ('000)	Overseas trips ('000)
Ashford	147	41
Canterbury	235	70
Dartford	65	16
Dover	155	34
Folkestone & Hythe	175	27
Gravesham	61	13
Maidstone	142	28
Medway	168	34
Sevenoaks	79	22
Swale	164	16
Thanet	172	50
Tonbridge and Malling	88	16
Tunbridge Wells	123	22
Kent	**1,774**	**389**

Staying nights in the county context	Domestic nights ('000)	Overseas nights ('000)
Ashford	368	167
Canterbury	649	389
Dartford	182	64
Dover	416	143
Folkestone & Hythe	493	139
Gravesham	173	68
Maidstone	405	155
Medway	521	221
Sevenoaks	219	110
Swale	604	97
Thanet	486	338
Tonbridge and Malling	243	83
Tunbridge Wells	312	128
Kent	**5,071**	**2,102**

Expenditure in the county context	Domestic spend (millions)	Overseas spend (millions)
Ashford	£21	£8
Canterbury	£31	£22
Dartford	£8	£3
Dover	£24	£9
Folkestone & Hythe	£27	£7
Gravesham	£7	£3
Maidstone	£19	£8
Medway	£20	£9
Sevenoaks	£11	£6
Swale	£21	£4
Thanet	£25	£24
Tonbridge and Malling	£11	£4
Tunbridge Wells	£17	£6
Kent	**£242**	**£113**

Staying Visitors - Accommodation Type   Swale - 2020 Results

Trips by Accommodation

	UK		Overseas		Total	
Serviced	16,000	10%	1,000	6%	17,000	9%
Self catering	7,000	4%	0	0%	7,000	4%
Camping	17,000	10%	1,000	6%	18,000	10%
Static caravans	54,000	33%	1,000	6%	55,000	31%
Group/campus	0	0%	0	0%	0	0%
Paying guest	0	0%	0	0%	0	0%
Second homes	2,000	1%	1,000	6%	3,000	2%
Boat moorings	2,000	1%	0	0%	2,000	1%
Other	2,000	1%	0	0%	2,000	1%
Friends & relatives	64,000	39%	12,000	75%	76,000	42%
Total 2020	**164,000**		**16,000**		**180,000**	
Comparison 2019	**351,200**		**44,000**		**395,200**	
Difference	**-53%**		**-64%**		**-54%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	35,000	6%	3,000	3%	38,000	5%
Self catering	13,000	2%	5,000	5%	18,000	3%
Camping	43,000	7%	4,000	4%	47,000	7%
Static caravans	286,000	47%	3,000	3%	289,000	41%
Group/campus	0	0%	1,000	1%	1,000	0%
Paying guest	0	0%	0	0%	0	0%
Second homes	8,000	1%	4,000	4%	12,000	2%
Boat moorings	15,000	2%	0	0%	15,000	2%
Other	8,000	1%	1,000	1%	9,000	1%
Friends & relatives	196,000	32%	76,000	78%	272,000	39%
Total 2020	**604,000**		**97,000**		**701,000**	
Comparison 2019	**1,224,000**		**302,000**		**1,526,000**	
Difference	**-51%**		**-68%**		**-54%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£3,733,000	18%	£282,000	7%	£4,015,000	16%
Self catering	£878,000	4%	£200,000	5%	£1,078,000	4%
Camping	£1,079,000	5%	£148,000	4%	£1,227,000	5%
Static caravans	£9,092,000	44%	£152,000	4%	£9,244,000	37%
Group/campus	£7,000	0%	£77,000	2%	£84,000	0%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£301,000	1%	£138,000	3%	£439,000	2%
Boat moorings	£391,000	2%	£0	0%	£391,000	2%
Other	£705,000	3%	£125,000	3%	£830,000	3%
Friends & relatives	£4,644,000	22%	£2,953,000	72%	£7,597,000	31%
Total 2020	**£20,830,000**		**£4,075,000**		**£24,905,000**	
Comparison 2019	**£44,577,000**		**£11,283,000**		**£55,860,000**	
Difference	**-53%**		**-64%**		**-55%**	

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

Swale - 2020 Results

Trips by Purpose

		UK		Overseas		Total	
Holiday		74,000	45%	6,000	38%	80,000	44%
Business		1,000	1%	0	0%	1,000	1%
Friends & relatives		86,000	52%	9,000	56%	95,000	53%
Other		3,000	2%	1,000	6%	4,000	2%
Study		0	0%	0	0%	0	0%
Total	**2020**	**164,000**		**16,000**		**180,000**	
Comparison	**2019**	**351,000**		**44,000**		**395,000**	
Difference		**-53%**		**-64%**		**-54%**	

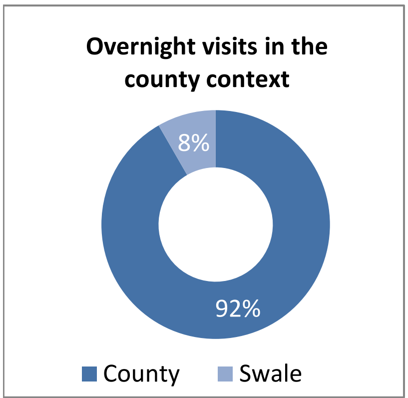
Nights by Purpose

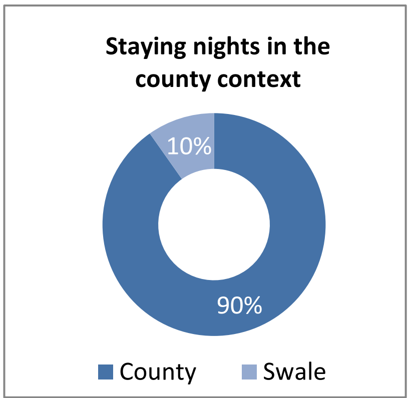
		UK		Overseas		Total	
Holiday		331,000	55%	27,000	28%	358,000	51%
Business		3,000	0%	1,000	1%	4,000	1%
Friends & relatives		260,000	43%	62,000	64%	322,000	46%
Other		10,000	2%	7,000	7%	17,000	2%
Study		0	0%	0	0%	0	0%
Total	**2020**	**604,000**		**97,000**		**701,000**	
Comparison	**2019**	**1,224,000**		**302,000**		**1,526,000**	
Difference		**-51%**		**-68%**		**-54%**	

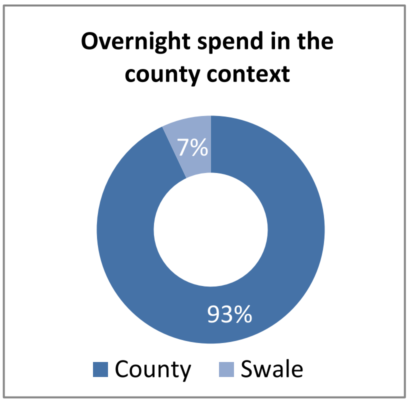
Spend by Purpose

		UK		Overseas		Total	
Holiday		£15,424,000	74%	£1,382,000	34%	£16,806,000	67%
Business		£942,000	5%	£28,000	1%	£970,000	4%
Friends & relatives		£3,551,000	17%	£2,232,000	55%	£5,783,000	23%
Other		£913,000	4%	£433,000	11%	£1,346,000	5%
Study		£0	0%	£0	0%	£0	0%
Total	**2020**	**£20,830,000**		**£4,075,000**		**£24,905,000**	
Comparison	**2019**	**£44,577,000**		**£11,283,000**		**£55,860,000**	
Difference		**-53%**		**-64%**		**-55%**	

Proportion of staying visits in the county context







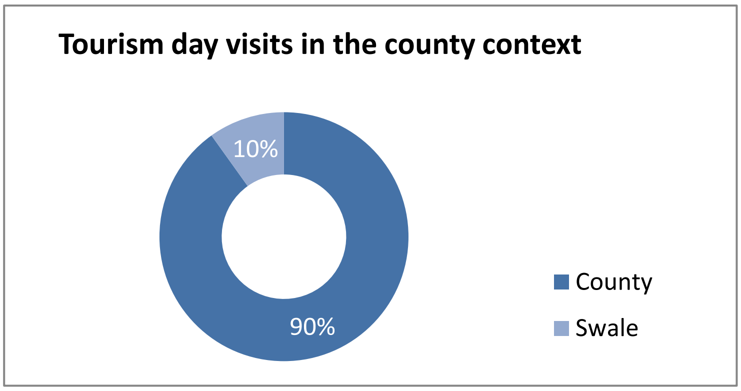
Day Visitors   Swale - 2020 Results

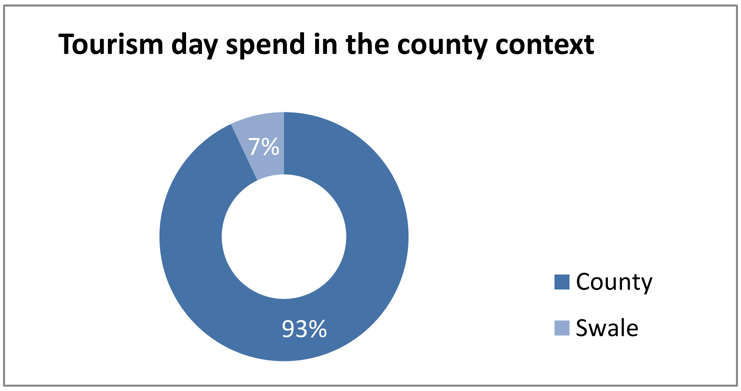
Total Volume and Value of Day Trips

		Trips	Spend
Total	**2020**	**3,085,000**	**£61,969,000**
Comparison	2019	4,994,000	£156,793,000
Difference		-38%	-60%

Day Visitors in the county context

District	Day Visits (millions)	Day visits Spend (millions)
Ashford	2.1	£62.73
Canterbury	3.8	£101.96
Dartford	4.5	£159.87
Dover	2.4	£53.56
Folkestone & Hythe	2.6	£56.62
Gravesham	0.9	£24.80
Maidstone	2.0	£62.00
Medway	2.1	£64.03
Sevenoaks	1.9	£63.41
Swale	3.1	£61.97
Thanet	2.1	£51.53
Tonbridge and Malling	1.5	£44.76
Tunbridge Wells	2.3	£77.13
Kent	**31.2**	**£884.35**





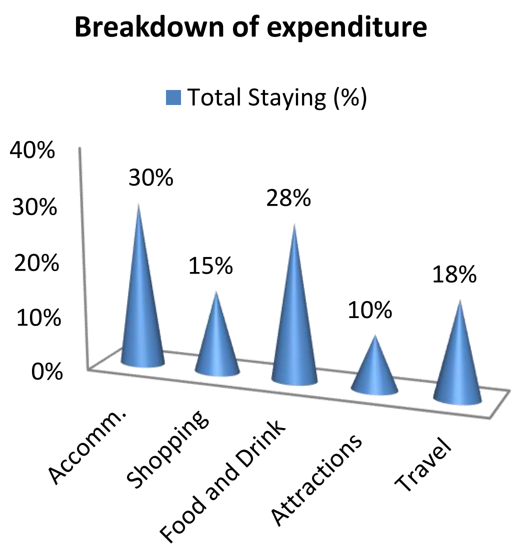
Value of Tourism

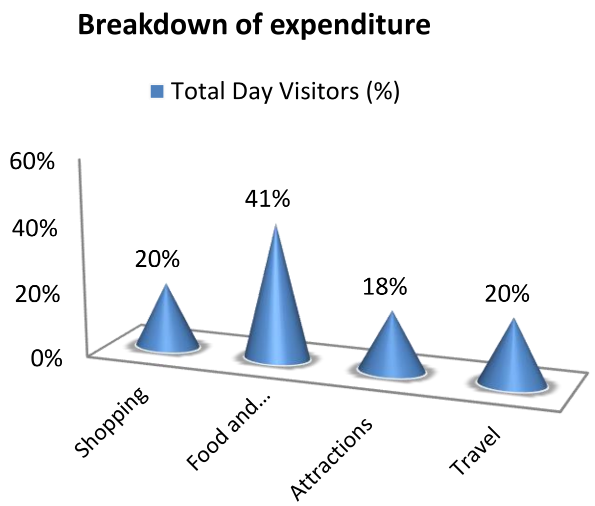
Expenditure Associated with Trips

Swale - 2020 Results

Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£6,390,000	£2,438,000	£6,063,000	£1,989,000	£3,950,000	£20,830,000
Overseas tourists	£967,000	£1,266,000	£954,000	£469,000	£419,000	£4,075,000
Total Staying	£7,357,000	£3,704,000	£7,017,000	£2,458,000	£4,369,000	£24,905,000
Total Staying (%)	30%	15%	28%	10%	18%	100%
Total Day Visitors	£0	£12,394,000	£25,717,000	£11,464,000	£12,394,000	£61,969,000
Total Day Visitors (%)	0%	20%	41%	18%	20%	100%
Total 2020	**£7,357,000**	**£16,098,000**	**£32,734,000**	**£13,922,000**	**£16,763,000**	**£86,874,000**
%	**8%**	**19%**	**38%**	**16%**	**19%**	**100%**
Comparison 2019	**£18,168,000**	**£72,061,000**	**£75,129,000**	**£23,382,000**	**£23,911,000**	**£212,651,000**
Difference	**-60%**	**-78%**	**-56%**	**-40%**	**-30%**	**-59%**





Other Expenditure Associated with Tourism Activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£130,000	£142,000	£28,000	£9,365,000	£9,665,000

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 £160 per visit has been assumed based on national research for social and personal visits.

Direct Turnover Derived From Trip

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		£7,497,000	£514,000	£8,011,000
Retail		£3,668,000	£12,270,000	£15,938,000
Catering		£6,807,000	£24,946,000	£31,753,000
Attractions		£2,565,000	£11,845,000	£14,410,000
Transport		£2,621,000	£7,436,000	£10,057,000
Non-trip spend		£9,665,000	£0	£9,665,000
Total Direct	**2020**	**£32,823,000**	**£57,011,000**	**£89,834,000**
Comparison	**2019**	**£80,482,000**	**£151,147,000**	**£231,629,000**
Difference		**-59%**	**-62%**	**-61%**

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		£1,762,000	£4,507,000	£6,269,000
Non trip spending		£1,450,000	£0	£1,450,000
Income induced		£1,850,000	£2,907,000	£4,757,000
Total	**2020**	**£5,062,000**	**£7,414,000**	**£12,476,000**
Comparison	**2019**	**£12,134,000**	**£18,912,000**	**£31,046,000**
Difference		**-58%**	**-61%**	**-60%**

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		£32,823,000	£57,011,000	£89,834,000
Indirect		£5,062,000	£7,414,000	£12,476,000
Total Value	**2020**	**£37,885,000**	**£64,425,000**	**£102,310,000**
Comparison	**2019**	**£92,616,000**	**£170,059,000**	**£262,675,000**
Difference		**-59%**	**-62%**	**-61%**

Employment

Employment   Swale - 2020 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 £43,000 increase in tourism revenue.

Direct Employment

Full time equivalent (FTE)							
		Staying Visitor		**Day Visitor**		**Total**	
Accommodation		215	27%	15	1%	230	11%
Retailing		67	8%	223	17%	289	14%
Catering		185	24%	679	53%	864	42%
Entertainment		52	7%	241	19%	294	14%
Transport		42	5%	119	9%	160	8%
Non-trip spend		225	29%	0	0%	225	11%
Total FTE	**2020**	**787**		**1,276**		**2,063**	
Comparison	**2019**	**1,278**		**1,998**		**3,276**	
Difference		**-38%**		**-36%**		**-37%**	

Estimated actual jobs							
		Staying Visitor		**Day Visitor**		**Total**	
Accommodation		318	29%	22	1%	340	11%
Retailing		100	9%	334	18%	434	15%
Catering		278	26%	1,018	54%	1,296	44%
Entertainment		74	7%	340	18%	413	14%
Transport		59	5%	167	9%	226	8%
Non-trip spend		256	24%	0	0%	256	9%
Total Actual	**2020**	**1,085**		**1,881**		**2,966**	
Comparison	**2019**	**1,706**		**2,968**		**4,674**	
Difference		**-36%**		**-37%**		**-37%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitor	**Day Visitors**	**Total**
Indirect jobs		75	76	151
Induced jobs		43	68	111
Total FTE	**2020**	**118**	**144**	**262**
Comparison	**2019**	**225**	**330**	**555**
Difference		**-48%**	**-56%**	**-53%**

Estimated actual jobs				
		Staying Visitor	**Day Visitors**	**Total**
Indirect jobs		85	87	173
Induced jobs		49	77	126
Total Actual	**2020**	**134**	**164**	**299**
Comparison	**2019**	**256**	**376**	**633**
Difference		**-48%**	**-56%**	**-53%**

Total Tourism Jobs — Swale - 2020 Results

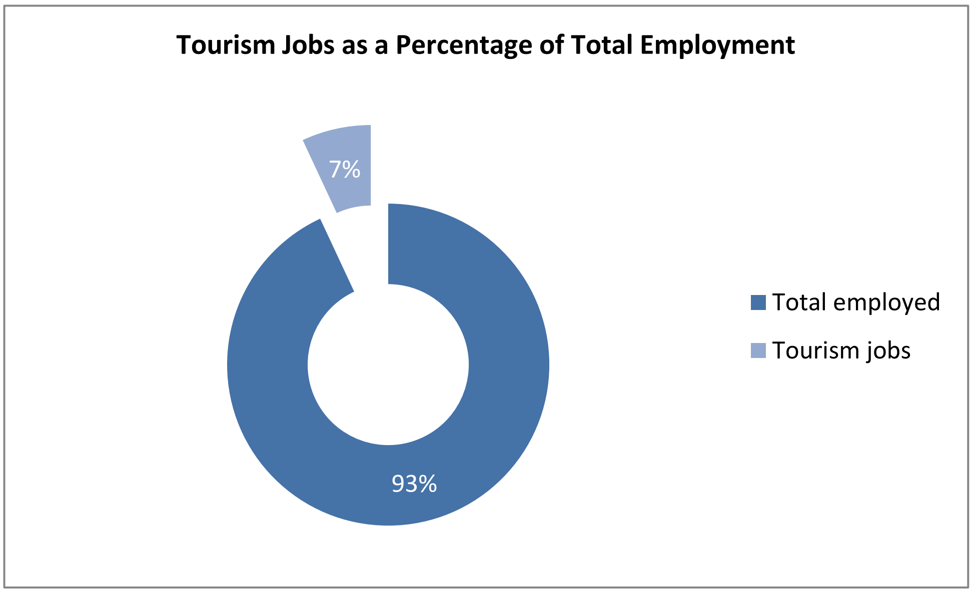
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Direct		787	87%	1,276	90%	2,063	89%
Indirect		75	8%	76	5%	151	7%
Induced		43	5%	68	5%	111	5%
Total FTE	**2020**	**904**		**1,420**		**2,324**	
Comparison	2019	1,502		2,328		3,830	
Difference		-40%		-39%		-39%	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Direct		1,085	89%	1,881	92%	2,966	91%
Indirect		85	7%	87	4%	172	5%
Induced		49	4%	77	4%	126	4%
Total Actual	**2020**	**1,219**		**2,045**		**3,264**	
Comparison	2019	1,963		3,344		5,307	
Difference		-38%		-39%		-38%	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day Visitors	Total
Total employed		47,000	47,000	47,000
Tourism jobs		1,219	2,045	3,264
Proportion all jobs		**3%**	**4%**	**7%**
Comparison	2019	1,963	3,344	5,307
Difference		-38%	-39%	-38%



Economic Impact of Tourism – Headline Figures **Swale - 2020 Results**

The key 2020 results of the Economic Impact Assessment are:

3.3 million trips were undertaken in the area
3.1 million day trips
0.2 million overnight visits

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

£90 million spent by tourists during their visit to the area
£7 million spent on average in the local economy each month.

£25 million generated by overnight visits
£62 million generated from day trips.

£102 million spent in the local area as result of tourism, taking into account multiplier effects.

3,264 jobs supported, both for local residents from those living nearby.
2,966 tourism jobs directly supported
298 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 Visits 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-2019 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 of Culture, Media and the 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 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 2020

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).

Ashford

Ashford Town Centre footfall date for 2020 and comparisons with the previous year 2019.
Footfall figures for Ashford Designer Outlet.
Ashford and Tenterden car parking data.

Canterbury

Springboard Footfall Reports for Canterbury, audience and economic impact reports, car parking data for Canterbury, Herne Bay and Whitstable, local businesses changes (accommodation and attractions) in Whitstable, Whitefriars Shopping Centre, Canterbury, Tankerton and Herne Bay, Footfall data from Kent Downs team and North Downs Way for Canterbury.

Gravesend

Annual footfall and car parks data for Gravesend from January to December 2020.

Maidstone

Maidstone town centre footfall figures April – December 2020. Information on cancelled events.

Swale

Faversham Town Council regarding footfall and town centre car parks.

Thanet

Anecdotal evidence – Very limited trade from language schools. Large attractions Dreamland Quex House closed and many local and Council run events did not take place.
High street footfall data and RNLI User data.

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45 Colchester Road
Manningtree
CO11 2BA