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delivering results : measuring what matters

Economic Impact of Tourism
Suffolk Coast & Heath AONBs - 2018

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Total number of trips (day & staying)
4,627,431

Total staying trips
314,100

Total staying nights
1,332,000

Total staying spend
£79,642,000

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

Associated spend
£13,946,000

Total day trips
4,313,331

Total day trip spend
£94,052,923

Total visitor spend
£174,225,899

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

Indirect / induced spend
£48,003,000

Total Tourism Value
£222,228,899

Full time equivalent jobs
3,591

Total actual tourism related employment
4,919

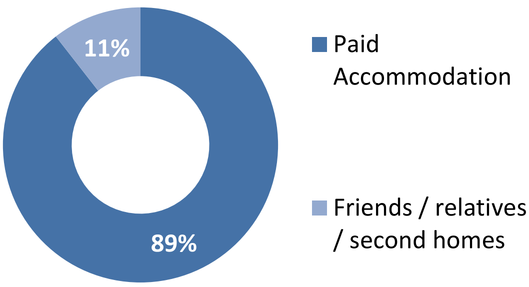
Percentage of all employment
n/a

Economic Impact of Tourism – Year on year comparisons

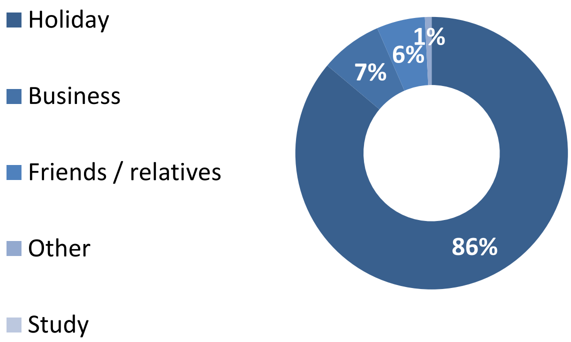
Day Trips	2017	2018	Annual variation
Day trips Volume	3,860,768	4,313,331	12%
Day trips Value	£84,496,075	£94,052,923	11%
Overnight trips			
Number of trip	306,600	314,100	2%
Number of nights	1,267,000	1,332,000	5%
Trip value	£78,933,000	£79,642,000	1%
Total Value	£210,068,409	£222,228,899	6%
Actual Jobs	4,655	4,919	6%

	2017	2018	Variation
Average length stay (nights x trip)	4.13	4.25	2.8%
Spend x overnight trip	£ 257.45	£ 253.88	-1.4%
Spend x night	£ 62.30	£ 59.75	-4.1%
Spend x day trip	£ 21.89	£ 21.81	-0.4%

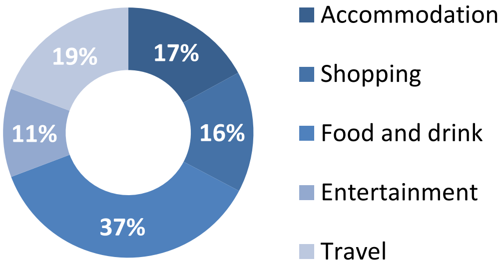
Type of Accommodation



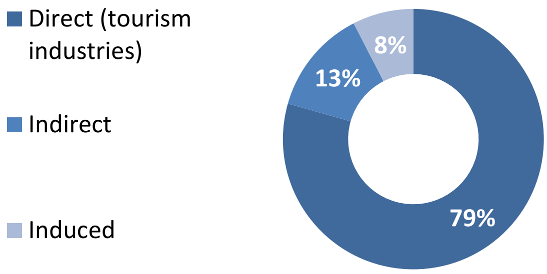
Trips by Purpose



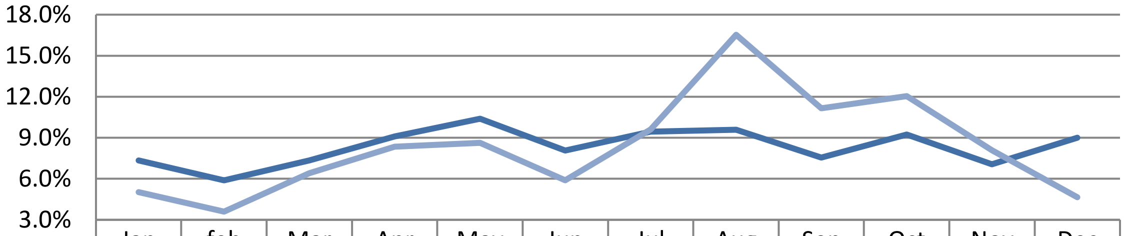
Breakdown of expenditure



Type of employment

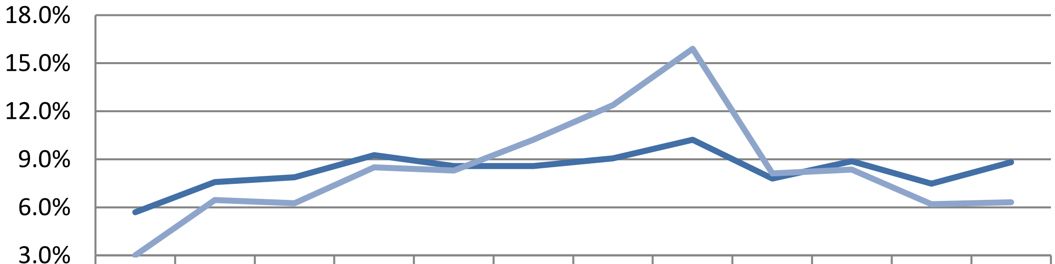


Seasonality - Day visitors (East of England)



	Jan	feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day trips	7.3%	5.9%	7.3%	9.1%	10.4%	8.1%	9.4%	9.6%	7.6%	9.2%	7.0%	9.0%
Day spend	5.0%	3.6%	6.4%	8.4%	8.6%	5.9%	9.6%	16.5%	11.2%	12.0%	8.1%	4.7%

Seasonality - Overnight visitors (East of England)



	Jan	feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overnight trips	5.7%	7.6%	7.9%	9.3%	8.6%	8.6%	9.1%	10.2%	7.8%	8.9%	7.5%	8.8%
Overnight spend	3.0%	6.4%	6.3%	8.5%	8.3%	10.2%	12.4%	15.9%	8.1%	8.4%	6.2%	6.3%

Contextual analysis

INTRODUCTION

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2018 and provides comparative data against previously published data. The results are derived using the Cambridge Economic Impact Model under licence by Destination Research Ltd based on the latest data from national tourism surveys and regionally/locally based data.

CONTEXTUAL ANALYSIS

The three key surveys used to measure volume and expenditure from tourism trips are the GB Tourism Survey (for domestic overnight trips), the International Passenger Survey (IPS) for visits from overseas, and the BG Day Visitor Survey (GBDVS), which measures tourism day visits.

Domestic tourism

National Performance

In 2018, British residents took 97.4 million overnight trips in England, totalling 296 million nights away from home and expenditure of £19 billion, with an average trip length of 3 nights. The number of domestic trips to England was 3% lower than in 2017. Holiday Trips in England in 2018 decreased by 4% compared to 2017, with 45.2 million trips recorded.

Regional performance

The East of England region experienced a 12% drop in overnight trips during 2018. Bednights were down by 14% on 2017 and expenditure was also down by 8%. However, these results are on the back of a positive 2017 when the region experienced a 3% increase in overnight trips on the previous year. Bednights were up by 13% on 2016 and expenditure was also up by 13%.

The average spend per night in 2018 was £55.97 (up from £52.5 in 2017) and the spend per trip was £179.51 (up from £172.58 in 2017). The region received less visitors in 2018 than in the previous year. But importantly, their length of stay was unchanged from 2017 and spent more money during their visit, compared average expenditure levels in 2017.

The GB Tourism Survey data is a key driver for the Cambridge model. However, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends. As such, county and district level results relating to 2018 are an average of 2016, 2017 and 2018.

Visits from overseas

National Performance

The number of visits in 2018 fell 3% (from the 2017 record) to 37.9 million, after several years of growth since 2010. The value of spending also decreased by 7% (compared to 2017) to £22.90 billion. Average spend per visit was £604 in 2018, down from £625 per visit in 2017. The number of visitor nights spent in the UK fell by 7% in 2018 to 266 million, with the average number of nights per visit declining to 7.0 (from 7.3 in 2017).

Regional performance

The number of Overseas trips to the East of England in 2018 was down 9% at 2.2 million overnight trips (2.4 million in 2017). The total number of nights was down by 14% to 13.9 million. Spend was down by 13.6% to £704 million in 2018 (£815.2 million in 2017).

The International Passenger Survey (IPS) data is a key driver for the Cambridge model. However, as with the GBTS, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends.

Tourism Day Visits

National Performance

During 2017, UK residents took a total of 1,703 million Tourism Day Visits (down from 1,793 in 2017). Around £63.8 billion was spent during these trips, about 2.2% up on 2017.

The largest proportion of visits were taken to destinations in England (1,431 million visits or 84% of the total). The distribution of expenditure during visits broadly reflects this pattern, with a total value of day trips to England totalling £53.04 billion (83% of the total for GB).

Regional performance

During 2018, the volume tourism day visits in the East of England increased by 3.5% to 137.4 million. Spend was also up by 31% to £5.04 billion).

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

		UK		Overseas		Total	
Serviced		97,700	35%	13,200	40%	110,900	35%
Self catering		30,300	11%	5,800	17%	36,100	12%
Camping		39,200	14%	2,400	7%	41,600	13%
Static caravans		62,000	22%	500	2%	62,500	20%
Group/campus		0	0%	0	0%	0	0%
Paying guest		0	0%	0	0%	0	0%
Second homes		19,200	7%	4,400	13%	23,600	8%
Boat moorings		0	0%	0	0%	0	0%
Other		7,100	3%	1,300	4%	8,400	3%
Friends & relatives		24,900	9%	5,700	17%	30,600	10%
Total	**2018**	**280,400**		**33,300**		**313,700**	
Comparison	**2017**	**273,400**		**33,200**		**306,600**	
Difference		**3%**		**0%**		**2%**	

Nights by Accommodation

		UK		Overseas		Total	
Serviced		198,000	18%	71,000	29%	269,000	20%
Self catering		232,000	21%	59,000	24%	291,000	22%
Camping		207,000	19%	13,000	5%	220,000	17%
Static caravans		249,000	23%	2,000	1%	251,000	19%
Group/campus		0	0%	0	0%	0	0%
Paying guest		0	0%	0	0%	0	0%
Second homes		98,000	9%	57,000	23%	155,000	12%
Boat moorings		0	0%	0	0%	0	0%
Other		21,000	2%	4,000	2%	25,000	2%
Friends & relatives		81,000	7%	41,000	17%	122,000	9%
Total	**2018**	**1,086,000**		**247,000**		**1,333,000**	
Comparison	**2017**	**997,000**		**270,000**		**1,267,000**	
Difference		**9%**		**-9%**		**5%**	

Spend by Accommodation Type

		UK		Overseas		Total	
Serviced		£26,040,000	38%	£3,210,000	28%	£29,250,000	37%
Self catering		£14,087,000	21%	£4,168,000	36%	£18,255,000	23%
Camping		£6,820,000	10%	£336,000	3%	£7,156,000	9%
Static caravans		£10,725,000	16%	£28,000	0%	£10,753,000	14%
Group/campus		£0	0%	£0	0%	£0	0%
Paying guest		£0	0%	£0	0%	£0	0%
Second homes		£4,898,000	7%	£1,833,000	16%	£6,731,000	8%
Boat moorings		£0	0%	£0	0%	£0	0%
Other		£2,656,000	4%	£95,000	1%	£2,751,000	3%
Friends & relatives		£2,851,000	4%	£1,894,000	16%	£4,745,000	6%
Total	**2018**	**£68,077,000**		**£11,564,000**		**£79,641,000**	
Comparison	**2017**	**£66,252,000**		**£12,682,000**		**£78,934,000**	
Difference		**3%**		**-9%**		**1%**	

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

Trips by Purpose

		UK		Overseas		Total	
Holiday		249,000	89%	21,500	64%	270,500	86%
Business		17,400	6%	5,700	17%	23,100	7%
Friends & relatives		12,400	4%	5,600	17%	18,000	6%
Other		1,900	1%	600	2%	2,500	1%
Study		0	0%	0	0%	0	0%
Total	**2018**	**280,700**		**33,400**		**314,100**	
Comparison	**2017**	**273,400**		**33,200**		**306,600**	
Difference		**3%**		**1%**		**2%**	

Nights by Purpose

		UK		Overseas		Total	
Holiday		1,008,000	93%	159,000	65%	1,167,000	88%
Business		38,000	3%	23,000	9%	61,000	5%
Friends & relatives		37,000	3%	56,000	23%	93,000	7%
Other		4,000	0%	7,000	3%	11,000	1%
Study		0	0%	0	0%	0	0%
Total	**2018**	**1,087,000**		**245,000**		**1,332,000**	
Comparison	**2017**	**997,000**		**270,000**		**1,267,000**	
Difference		**9%**		**-9%**		**5%**	

Spend by Purpose

		UK		Overseas		Total	
Holiday		£60,401,000	89%	£7,495,000	65%	£67,896,000	85%
Business		£5,561,000	8%	£1,686,000	15%	£7,247,000	9%
Friends & relatives		£1,836,000	3%	£2,046,000	18%	£3,882,000	5%
Other		£281,000	0%	£336,000	3%	£617,000	1%
Study		£0	0%	£0	0%	£0	0%
Total	**2018**	**£68,079,000**		**£11,563,000**		**£79,642,000**	
Comparison	**2017**	**£66,251,000**		**£12,682,000**		**£78,933,000**	
Difference		**3%**		**-9%**		**1%**	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

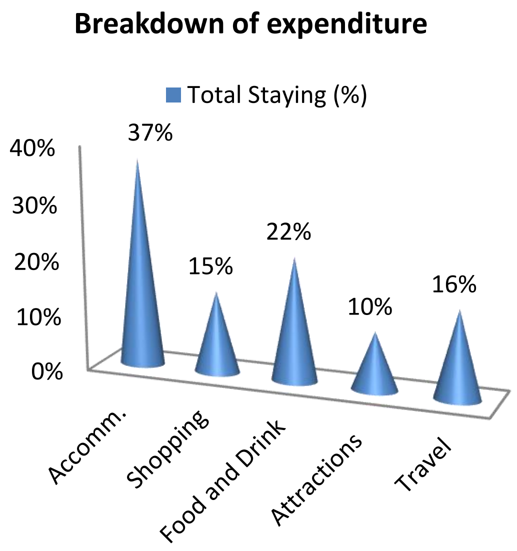
		Trips	Spend
Urban visits		385,000	£11,434,500
Countryside visits		1,731,427	£24,378,492
Coastal visits		2,196,904	£58,239,931
Total	**2018**	**4,313,331**	**£94,052,923**
Comparison	**2017**	**3,860,768**	**£84,496,075**
Difference		**12%**	**11%**

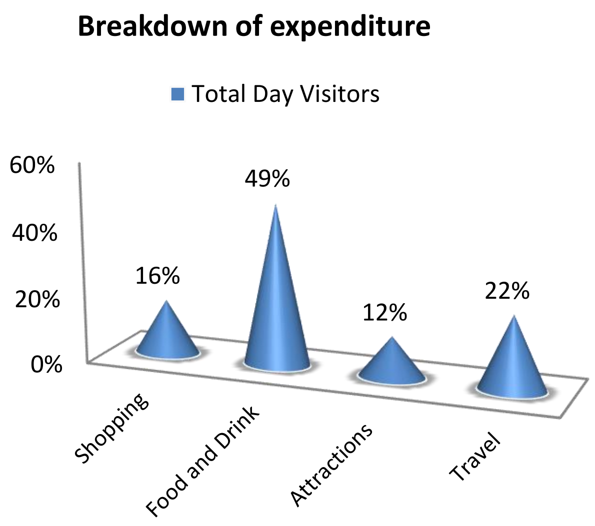
Value of Tourism

Expenditure Associated with Trips:

Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£25,893,000	£8,556,000	£14,999,000	£7,270,000	£11,360,000	£68,078,000
Overseas tourists		£3,741,000	£3,120,000	£2,598,000	£963,000	£1,143,000	£11,565,000
Total Staying		£29,634,000	£11,676,000	£17,597,000	£8,233,000	£12,503,000	£79,643,000
Total Staying (%)		37%	15%	22%	10%	16%	100%
Total Day Visitors		£0	£15,516,000	£45,837,000	£11,670,000	£21,026,000	£94,049,000
Total Day Visitors		0%	16%	49%	12%	22%	100%
Total	**2018**	**£29,634,000**	**£27,192,000**	**£63,434,000**	**£19,903,000**	**£33,529,000**	**£173,692,000**
%		**17%**	**16%**	**37%**	**11%**	**19%**	**100%**
Comparison	**2017**	**£29,356,000**	**£25,395,000**	**£58,747,000**	**£18,528,000**	**£31,415,000**	**£163,441,000**
Difference		**1%**	**7%**	**8%**	**7%**	**7%**	**6%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£3,828,000	£0	£6,886,000	£3,232,000	£13,946,000

Spend on second homes is assumed to be an average of £2,100 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,100 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 £2,100. 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

Direct Turnover Derived From Trip Expenditure

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		£29,986,000	£917,000	£30,903,000
Retail		£11,558,663	£15,360,840	£26,919,503
Catering		£17,069,000	£44,461,633	£61,530,633
Attractions		£8,526,000	£12,283,326	£20,809,326
Transport		£7,502,000	£12,615,436	£20,117,436
Non-trip spend		£13,946,000	£0	£13,946,000
Total Direct	**2018**	**£88,587,663**	**£85,638,235**	**£174,225,899**
Comparison	**2017**	**£87,603,649**	**£76,888,760**	**£164,492,409**
Difference		**1%**	**11%**	**6%**

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		£14,880,000	£12,707,000	£27,587,000
Non trip spending		£2,789,000	£0	£2,789,000
Income induced		£9,548,000	£8,079,000	£17,627,000
Total	**2018**	**£27,217,000**	**£20,786,000**	**£48,003,000**
Comparison	**2017**	**£26,894,000**	**£18,682,000**	**£45,576,000**
Difference		**1%**	**11%**	**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		£88,587,663	£85,638,235	£174,225,899
Indirect		£27,217,000	£20,786,000	£48,003,000
Total Value	**2018**	**£115,804,663**	**£106,424,235**	**£222,228,899**
Comparison	**2017**	**£114,497,649**	**£95,570,760**	**£210,068,409**
Difference		**1%**	**11%**	**6%**

Employment

Employment

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

Direct employment

Full time equivalent (FTE)							
		Staying Visitor		**Day Visitor**		**Total**	
Accommodation		564	39%	17	1%	581	21%
Retailing		129	9%	172	14%	301	11%
Catering		301	21%	785	62%	1,087	40%
Entertainment		125	9%	179	14%	304	11%
Transport		64	4%	107	9%	171	6%
Non-trip spend		258	18%	0	0%	258	10%
Total FTE	**2018**	**1,441**		**1,261**		**2,702**	
Comparison	**2017**	**1,424**		**1,133**		**2,557**	
Difference		**1%**		**11%**		**6%**	

Estimated actual jobs							
		Staying Visitor		**Day Visitor**		**Total**	
Accommodation		834	41%	26	1%	860	22%
Retailing		194	10%	258	14%	452	12%
Catering		452	22%	1,178	63%	1,630	42%
Entertainment		176	9%	253	14%	429	11%
Transport		90	4%	151	8%	241	6%
Non-trip spend		294	14%	0	0%	294	8%
Total Actual	**2018**	**2,040**		**1,865**		**3,905**	
Comparison	**2017**	**2,018**		**1,675**		**3,693**	
Difference		**1%**		**11%**		**6%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitor	**Day Visitors**	**Total**
Indirect jobs		327	235	563
Induced jobs		177	150	326
Total FTE	**2018**	**504**	**385**	**889**
Comparison	**2017**	**498**	**346**	**844**
Difference		**1%**	**11%**	**5%**

Estimated actual jobs				
		Staying Visitor	**Day Visitors**	**Total**
Indirect jobs		373	268	641
Induced jobs		202	171	372
Total Actual	**2018**	**575**	**439**	**1,013**
Comparison	**2017**	**568**	**394**	**962**
Difference		**1%**	**11%**	**5%**

Total Jobs

> 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		1,441	74%	1,261	77%	2,702	75%
Indirect		327	17%	235	14%	563	16%
Induced		177	9%	150	9%	326	9%
Total FTE	**2018**	**1,945**		**1,646**		**3,591**	
Comparison	**2017**	**1,922**		**1,479**		**3,401**	
Difference		**1%**		**11%**		**6%**	

Estimated actual jobs							
		Staying Visitor		**Day Visitor**		**Total**	
Direct		2,040	78%	1,865	81%	3,905	79%
Indirect		373	14%	268	12%	641	13%
Induced		202	8%	171	7%	372	8%
Total Actual	**2018**	**2,615**		**2,304**		**4,919**	
Comparison	**2017**	**2,585**		**2,070**		**4,655**	
Difference		**1%**		**11%**		**6%**	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day visitors	Total
Total employed		n/a	n/a	n/a
Tourism jobs		2,615	2,304	4,919
Proportion all jobs		**n/a**	**n/a**	**n/a**
Comparison	**2017**	**2,585**	**2,070**	**4,655**
Difference		**1%**	**11%**	**6%**

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- 2018 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.

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