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delivering results : measuring what matters

Economic Impact of Tourism

2023 Results

Economic Impact of Tourism

Maldon - 2023

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Economic Impact of Tourism – Headline Figures Maldon - 2023

Total number of trips (day & staying)
4,068,800

Total staying trips
142,800

Total staying nights
462,100

Total staying spend
£20,984,000

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

Associated spend
£16,830,250

Total day trips
3,926,000

Total day trip spend
£157,159,000

Total visitor spend
£180,370,250

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
£38,382,000

Total Tourism Value
£218,752,250

Full time equivalent jobs
2,857

Total actual tourism related employment
3,884

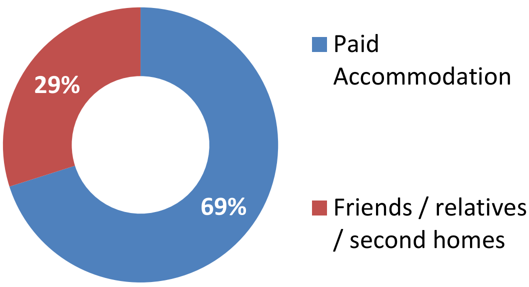
Percentage of all employment
17.2%

Economic Impact of Tourism – Year on year comparisons

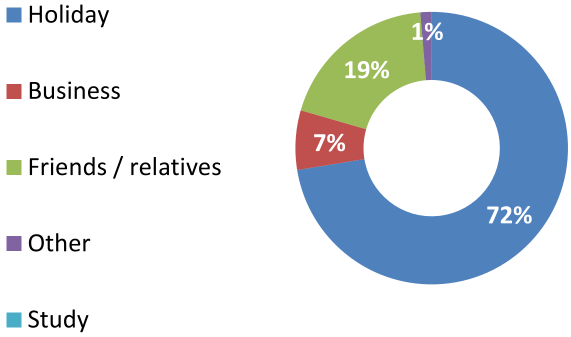
				Year-on-year comparison	Pre-pandemic levels
Day Trips	**2023**	**2022**	**2019**	**2023 v 2022**	**2023 v 2019**
Day trips Volume	3,926,000	4,190,000	3,987,000	-6%	-2%
Day trips Value	£157,159,000	£160,784,000	£155,900,000	-2%	1%
Overnight trips					
Number of overnight trips	142,800	132,800	146,800	8%	-3%
Number of nights	462,100	465,300	496,600	-1%	-7%
Overnight trip value	£20,984,000	£23,867,000	£22,615,000	-12%	-7%
Total Value	**£218,752,250**	**£227,839,938**	**£220,289,250**	**-4%**	**-1%**
Actual Jobs	**3,884**	**4,054**	**3,915**	**-4%**	**-1%**

	2023	2022	2019	2023 v 2022	2023 v 2019
Average length stay (nights x trip)	3.24	3.50	3.38	-7.6%	-4.3%
Spend x overnight trip	£146.95	£179.72	£154.05	-18.2%	-4.6%
Spend x night	£45.41	£51.29	£45.54	-11.5%	-0.3%
Spend x day trip	£40.03	£38.37	£39.10	4.3%	2.4%

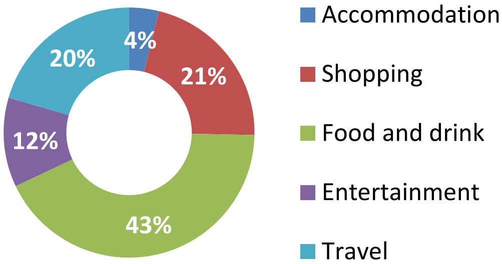
Type of Accommodation



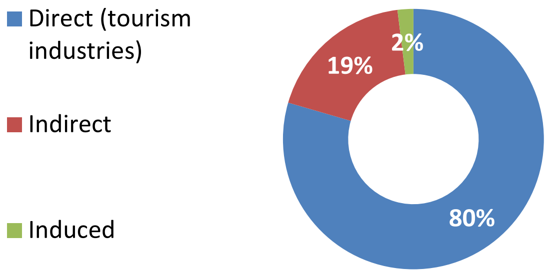
Trips by Purpose



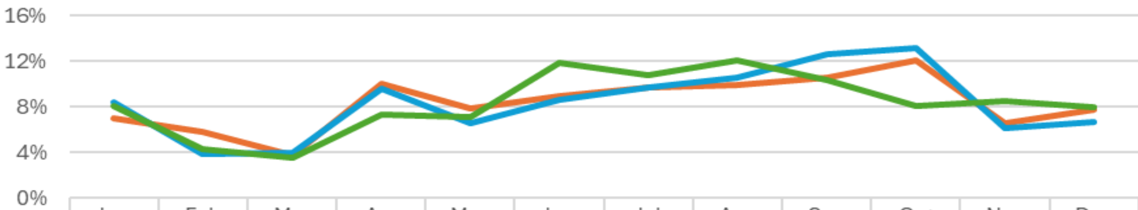
Breakdown of expenditure



Type of employment



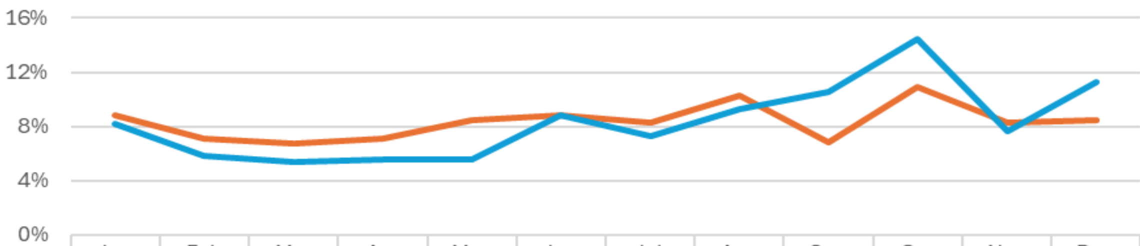
Domestic Overnight Trips - East of England - 2023



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trips	7%	6%	4%	10%	8%	9%	10%	10%	11%	12%	7%	8%
Nights	8%	4%	4%	10%	7%	9%	10%	11%	13%	13%	6%	7%
Spend	8%	4%	4%	7%	7%	12%	11%	12%	10%	8%	9%	8%

Trips Nights Spend

Tourism DayTrips - East of England - 2023



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trips	9%	7%	7%	7%	8%	9%	8%	10%	7%	11%	8%	8%
Spend	8%	6%	5%	6%	6%	9%	7%	9%	11%	14%	8%	11%

Trips Spend

Introduction

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2023 and provides comparative data against the previously published data for 2022 as well as providing headline comparisons against 2019 in order to monitor the recovery from the COVID-19 pandemic.

The Cambridge Model is a constantly evolving product. During the pandemic, all data collection for the key national tourism surveys used in the model ceased. This was followed with a change in the way domestic and overseas tourism statistics were captured. Data collection for domestic tourism moved from two surveys, one for day visits (GBDVS) and one for overnight stays (GBTS) based on face-to-face interviewing, to a new combined online survey collecting data on both domestic overnight trips as well as domestic day trips. The revised methodology to 2023's data was also applied to the already published in 2022, the only other comparative full year of new data now available.

Responding to these changes, we adopted a hybrid data approach with a two-stage evaluation process. First, the Cambridge Model disaggregates regional tourism data into sub-regional areas, using a top-down approach. It then pairs this with bottom-up initiatives, including contextual and sector-specific data from third-party sources and detailed destination-level business performance data captured by or on behalf of our destination partners.

This evolving methodology has been pivotal in our ability to produce a dynamic and reliable picture of tourism trends throughout the pandemic years and beyond. It also ensures that our results are as timely, accurate, consistent, and comparable as they can be. Some examples of additional data sources introduced in the last 5 years are:

- Attractions data - ALVA (Association of Leading Visitor Attractions)
- Short-term rental stock and occupancy - Lighthouse / AirDNA
- Hotel market data and benchmarking – STR
- Tourism business counts - Inter Departmental Business Register (IDBR)
- UK inflation data - Consumer Prices Index (CPI, CPIH), Retail Prices Index (RPI)
- UK economy forecasts - Office for Budget Responsibility: Economic and fiscal outlook
- Footfall data (town centres, large retail outlets and car parks).

Domestic Tourism

Overnights visits

The revised 2023 data shows a decline in overnight trips by 5% compared to 2022 for Britain and England (2022, was generally viewed as a particularly good post pandemic year for domestic tourism). The total overnight trip spend was down 2% for both, Britain and England. When taking inflation into account, the total overnight trip spend was down 9%, compared to 2022.

The East of England registered 8.9 million domestic overnight trips during 2023 (down 13% from 10.3 million trips in 2022). These trips contributed a total of £2.02 billion in spend (down 9% from £2.21 billion in 2022 and down 15% in real terms, accounting for inflation).

Accommodation occupancy

East of England – Serviced Accommodation Room Occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
2019	63%	72%	72%	74%	78%	81%	84%	79%	81%	80%	75%	67%	76%
2022	55%	70%	74%	76%	76%	82%	85%	81%	83%	80%	79%	73%	76%
2023	69%	77%	78%	80%	81%	83%	84%	81%	84%	80%	76%	71%	79%

It is possible that hotel occupancy measures overstate trips compared to previous years because of ongoing workforce shortages. hospitality businesses' coping strategies for workforce shortages included closing on certain days or reducing the number of rooms available. This means that the number of rooms occupied could be lower while the occupancy rate was the same, due to fewer available rooms.

East of England – Self Catering Unit Occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Average
2019	51%	50%	49%	56%	55%	58%	53%	67%	55%	54%	47%	50%	54%
2023	42%	46%	44%	49%	47%	49%	53%	57%	48%	44%	39%	44%	47%

Short-term holiday rentals experienced a surge since the pandemic. However, the sector is now feeling the effects of the cost-of-living crisis, and an increasingly oversupply of holiday lets. According to AirDNA, new listings for homes in the UK jumped 22% year on year in 2023.

Day visits

Visits to visitor attractions

Visitor Attraction Trends in England 2023 report (Visit England, July 2024) shows that admissions volume for participating attractions in 2023 were 11% up (196.14m) on 2022 (176.87m), but 28% down on 2019 (273.75m). The sector's growth was mainly fuelled by the return of overseas visitors and an increase in school trips in 2023.

There was an 8% increase in 2023 adult admission fees but was not sufficient to absorb the rising supplier and energy costs, a general decline in staycations and the wet weather (affecting outdoor attractions).

Overall, visitors to ALVA's top 374 sites (Association of Leading Visitor Attractions) were up 19% year-on-year in 2023 to 146.6 million as the sector continues its climb back to pre-pandemic levels. Overall, current numbers are 11% down on 2019.

The East of England experienced a 6% year-on-year raise in admissions in 2023, based on the volume of visits to the same attractions. The region was least affected by the pandemic, and has been the quickest to recover, now only 2% behind 2019 levels.

The total number of visits to ALVA (Association of Leading Visitor Attractions) sites in the East of England in 2023 was 10% up on the previous year. The 2023 figures are in line with the volume of visits to the same attractions in 2019.

Overseas tourism

Visitor numbers: Official data from the Office for National Statistics (ONS) showed that there were 38.0 million overseas tourists visiting the UK last year (up 21% vs 2022). Overall, 292.9 million nights were spent in the UK in 2023, up 1% vs 2019 and up 11% vs 2022

Visitor spending: In nominal terms, spend has been setting records, although not in real terms i.e. adjusting for inflation. Spend per visit has been almost tracking inflation, therefore the total value of spend has been almost tracking the volume of visits in real terms i.e. adjusting for inflation. Inbound visitors spent a record £31.1 billion during 2023, up 17% vs 2022. Taking inflation into account, visitor spend was up 9% vs 2022.

The East of England registered 2.2 million inbound visits during 2023 (up 9% from 2.0 million trips in 2022). These trips contributed a total of £1.11 billion in spend (up 11% from £1.00 billion in 2022).

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	32,000	25%	800	5%	32,800	23%
Self catering	1,000	1%	400	2%	1,400	1%
Camping	16,000	13%	2,700	16%	18,700	13%
Static caravans	32,000	25%	200	1%	32,200	23%
Group/campus	3,000	2%	2,300	14%	5,300	4%
Paying guest	0	0%	0	0%	0	0%
Second homes	5,000	4%	1,100	7%	6,100	4%
Boat moorings	4,000	3%	0	0%	4,000	3%
Other	1,000	1%	3,300	20%	4,300	3%
Friends & relatives	32,000	25%	6,100	36%	38,100	27%
Total 2023	**126,000**		**16,800**		**142,800**	
Comparison 2022	**119,000**		**13,800**		**132,800**	
Difference	**6%**		**22%**		**8%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	56,000	16%	2,100	2%	58,100	13%
Self catering	2,000	1%	2,400	2%	4,400	1%
Camping	53,000	15%	12,400	11%	65,400	14%
Static caravans	102,000	29%	900	1%	102,900	22%
Group/campus	16,000	5%	26,800	25%	42,800	9%
Paying guest	0	0%	0	0%	0	0%
Second homes	14,000	4%	31,400	29%	45,400	10%
Boat moorings	18,000	5%	0	0%	18,000	4%
Other	3,000	1%	4,900	5%	7,900	2%
Friends & relatives	90,000	25%	27,200	25%	117,200	25%
Total 2023	**354,000**		**108,100**		**462,100**	
Comparison 2022	**374,000**		**91,300**		**465,300**	
Difference	**-5%**		**18%**		**-1%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£7,220,000	41%	£75,000	2%	£7,295,000	35%
Self catering	£121,000	1%	£160,000	5%	£281,000	1%
Camping	£1,758,000	10%	£529,000	15%	£2,287,000	11%
Static caravans	£3,660,000	21%	£0	0%	£3,660,000	17%
Group/campus	£173,000	1%	£965,000	28%	£1,138,000	5%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£854,000	5%	£565,000	16%	£1,419,000	7%
Boat moorings	£952,000	5%	£0	0%	£952,000	5%
Other	£213,000	1%	£286,000	8%	£499,000	2%
Friends & relatives	£2,523,000	14%	£930,000	27%	£3,453,000	16%
Total 2023	**£17,475,000**		**£3,509,000**		**£20,984,000**	
Comparison 2022	**£20,454,000**		**£3,413,000**		**£23,867,000**	
Difference	**-15%**		**3%**		**-12%**	

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		94,000	75%	8,700	52%	102,700	72%
Business		10,000	8%	0	0%	10,000	7%
Friends & relatives		20,000	16%	7,200	43%	27,200	19%
Other		1,000	1%	900	5%	1,900	1%
Study		0	0%	0	0%	0	0%
Total	**2023**	**126,000**		**16,800**		**142,800**	
Comparison	**2022**	**119,000**		**13,800**		**132,800**	
Difference		**6%**		**22%**		**8%**	

Nights by Purpose

		UK		Overseas		Total	
Holiday		275,000	78%	41,200	38%	316,200	68%
Business		24,000	7%	0	0%	24,000	5%
Friends & relatives		51,000	14%	62,100	57%	113,100	24%
Other		4,000	1%	4,800	4%	8,800	2%
Study		0	0%	0	0%	0	0%
Total	**2023**	**354,000**		**108,100**		**462,100**	
Comparison	**2022**	**374,000**		**91,300**		**465,300**	
Difference		**-5%**		**18%**		**-1%**	

Spend by Purpose

		UK		Overseas		Total	
Holiday		£12,979,000	74%	£1,728,000	49%	£14,707,000	70%
Business		£2,806,000	16%	£0	0%	£2,806,000	13%
Friends & relatives		£1,386,000	8%	£1,557,000	44%	£2,943,000	14%
Other		£304,000	2%	£225,000	6%	£529,000	3%
Study		£0	0%	£0	0%	£0	0%
Total	**2023**	**£17,475,000**		**£3,509,000**		**£20,984,000**	
Comparison	**2022**	**£20,454,000**		**£3,413,000**		**£23,867,000**	
Difference		**-15%**		**3%**		**-12%**	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

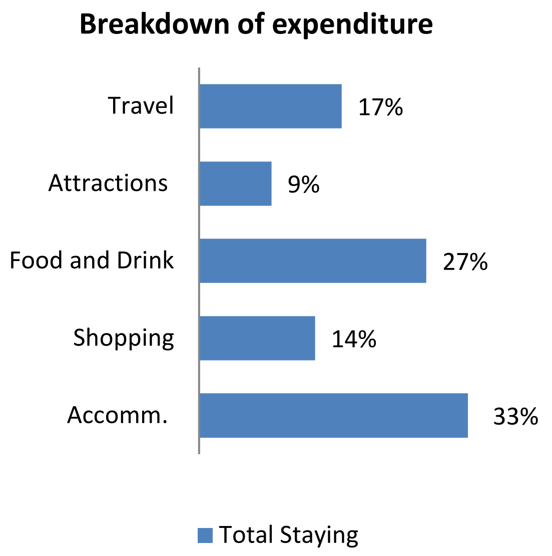
		Trips	Spend
Urban visits		1,166,000	£53,483,000
Countryside visits		973,000	£35,582,000
Coastal visits		1,787,000	£68,094,000
Total	**2023**	**3,926,000**	**£157,159,000**
Comparison	**2022**	**4,190,000**	**£160,784,000**
Difference		**-6%**	**-2%**

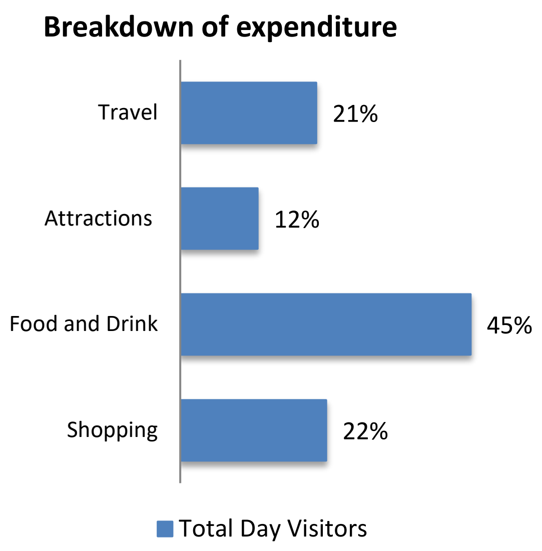
Value of Tourism

Expenditure Associated with Trips:

Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£5,933,000	£1,886,000	£4,931,000	£1,467,000	£3,257,000	£17,474,000
Overseas tourists	£889,000	£1,053,000	£835,000	£373,000	£359,000	£3,509,000
Total Staying	£6,822,000	£2,939,000	£5,766,000	£1,840,000	£3,616,000	£20,983,000
Total Staying	33%	14%	27%	9%	17%	100%
Total Day Visitors	£0	£35,319,000	£70,207,000	£18,740,000	£32,893,000	£157,159,000
Total Day Visitors	0%	22%	45%	12%	21%	100%
Total 2023	**£6,822,000**	**£38,258,000**	**£75,973,000**	**£20,580,000**	**£36,509,000**	**£178,142,000**
%	**4%**	**21%**	**43%**	**12%**	**20%**	**100%**
Comparison 2022	**£7,648,000**	**£38,496,000**	**£78,599,000**	**£21,411,000**	**£38,494,000**	**£184,648,000**
Difference	**-11%**	**-1%**	**-3%**	**-4%**	**-5%**	**-4%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£1,504,000	£3,631,250	£6,195,000	£5,500,000	£16,830,250

Spend on second homes is assumed to be an average of £2,200 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,300 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 £2,300. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £190 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	£6,938,000	£1,404,000	£8,342,000
Retail	£2,909,000	£34,966,000	£37,875,000
Catering	£5,593,000	£68,101,000	£73,694,000
Attractions	£1,927,000	£19,796,000	£21,723,000
Transport	£2,170,000	£19,736,000	£21,906,000
Non-trip spend	£16,830,250	£0	£16,830,250
Total Direct 2023	**£36,367,250**	**£144,003,000**	**£180,370,250**
Comparison 2022	**£40,490,938**	**£147,096,000**	**£187,586,938**
Difference	**-10%**	**-2%**	**-4%**

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

Supplier and Income Induced Turnover

	Staying Visitor	Day Visitors	Total
Indirect spend	£5,289,000	£25,897,000	£31,186,000
Non trip spending	£3,534,000	£0	£3,534,000
Income induced	£1,937,000	£1,725,000	£3,662,000
Total 2023	**£10,760,000**	**£27,622,000**	**£38,382,000**
Comparison 2022	**£11,957,000**	**£28,296,000**	**£40,253,000**
Difference	**-10%**	**-2%**	**-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	£36,367,250	£144,003,000	£180,370,250
Indirect	£10,760,000	£27,622,000	£38,382,000
Total Value 2023	**£47,127,250**	**£171,625,000**	**£218,752,250**
Comparison 2022	**£52,447,938**	**£175,392,000**	**£227,839,938**
Difference	**-10%**	**-2%**	**-4%**

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		99	18%	20	1%	119	6%
Retailing		23	4%	272	17%	294	14%
Catering		77	14%	935	58%	1,011	47%
Entertainment		27	5%	278	17%	305	14%
Transport		12	2%	111	7%	123	6%
Non-trip spend		306	56%	0	0%	306	14%
Total FTE	**2023**	**544**		**1,616**		**2,160**	
Comparison	**2022**	**602**		**1,653**		**2,255**	
Difference		**-10%**		**-2%**		**-4%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Accommodation		147	21%	30	1%	177	6%
Retailing		34	5%	407	17%	441	14%
Catering		115	16%	1,402	59%	1,517	49%
Entertainment		38	5%	392	16%	430	14%
Transport		17	2%	157	7%	174	6%
Non-trip spend		349	50%	0	0%	349	11%
Total Actual	**2023**	**700**		**2,388**		**3,088**	
Comparison	**2022**	**777**		**2,442**		**3,220**	
Difference		**-10%**		**-2%**		**-4%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitor	Day Visitors	Total
Indirect jobs		160	471	631
Induced jobs		35	31	67
Total FTE	**2023**	**196**	**502**	**698**
Comparison	**2022**	**217**	**514**	**732**
Difference		**-10%**	**-2%**	**-5%**

Estimated actual jobs				
		Staying Visitor	Day Visitors	Total
Indirect jobs		183	537	720
Induced jobs		40	36	76
Total Actual	**2023**	**223**	**573**	**796**
Comparison	**2022**	**248**	**586**	**834**
Difference		**-10%**	**-2%**	**-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		544	74%	1,616	76%	2,160	76%
Indirect		160	22%	471	22%	631	22%
Induced		35	5%	31	1%	67	2%
Total FTE	**2023**	**740**		**2,118**		**2,857**	
Comparison	**2022**	**820**		**2,167**		**2,987**	
Difference		**-10%**		**-2%**		**-4%**	

Estimated actual jobs							
		Staying Visitor		**Day Visitor**		**Total**	
Direct		700	76%	2,388	81%	3,088	80%
Indirect		183	20%	537	18%	720	19%
Induced		40	4%	36	1%	76	2%
Total Actual	**2023**	**923**		**2,960**		**3,884**	
Comparison	**2022**	**1,025**		**3,029**		**4,054**	
Difference		**-10%**		**-2%**		**-4%**	

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.

Data sources

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

- Domestic tourism statistics: An online survey collecting data on both domestic overnight trips as well as domestic day trips.
- International Passenger Survey (IPS) information on overseas visitors to the UK.

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;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions;
- Attractions data supplied by ALVA (Association of Leading Visitor Attractions)
- Short-term rental stock and occupancy - Lighthouse / AirDNA
- Hotel market data and benchmarking – STR
- Latest estimates of resident population as based on the Census of Population;
- Selected data from ONS employment-related surveys;
- Selected data on the countryside and coast including, national designations and length of the coastline (where relevant).

The model also includes contextual and sector-specific data from third-party sources and destination-level business performance data captured by or on behalf of our destination partners. Data sources include:

- Tourism business counts - Inter Departmental Business Register (IDBR)
- UK inflation data - Consumer Prices Index (CPI, CPIH), Retail Prices Index (RPI)
- UK economy forecasts - Office for Budget Responsibility: Economic and fiscal outlook
- Footfall data (town centres, large retail outlets and car parks).

Limitations of the Model

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.

Staying Visitors
Data on domestic overnight visits is based on a new combined online survey that replaced the separate Great Britain Tourism Survey and Great Britain Day Visits Survey. It 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 International Passenger Survey (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 a new combined online survey that replaced the separate Great Britain Tourism Survey and Great Britain Day Visits Survey. The new 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 above-mentioned surveys offer a 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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