Commissioned by:

Economic Impact of Tourism

White Cliffs Country (Dover District) - 2023 Results

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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 2023 and provides comparative data against the previously published data for 2021, as well as providing headline comparisons against 2019 in order to monitor the recovery following 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 applied to data for 2023 was also applied to previously published data for 2022, the only other comparative full year of new data now available. Please note that while the methodology for national 2021 data may differ due to the pandemic and pauses in data collection, this does not impact the validity of the results and please refer to the 2021 report for additional information and context.

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
• Local serviced accommodation data
• 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 Britain and 3% for England. When taking inflation into account, the total overnight trip spend for both England and Britain was down 9%, compared to 2022.

The South East of England registered 15.2 million domestic overnight trips during 2023 (down 5% from 16.0 million trips in 2022). These trips contributed a total of £3.56 billion in spend (up 2% from £3.49 billion in 2022 but down 5% in real terms, accounting for inflation).

Accommodation occupancy

South East – 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.

South East – Self Catering Unit Occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
2019	47%	49%	48%	55%	57%	59%	64%	66%	55%	52%	47%	50%	54%
2023	43%	47%	45%	52%	51%	53%	58%	58%	51%	46%	42%	47%	49%

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 increasing oversupply of holiday lets. According to AirDNA, new listings for homes in the UK jumped 22% year-on-year in 2023.

The average occupancy for short-term rental properties in Kent stood at 52% compared to 55% in 2022. The number of available listings during 2023 increased by 12%, compared to 2022.

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 admission fees but was not sufficient to absorb the rising supplier and energy costs, a general decline in staycations and the wet weather.

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 Sout East experienced a 4% year-on-year raise in admissions in 2023, based on the volume of visits to the same attractions. The region is still recovering from the pandemic with admissions being 12% down, based on the volume of visits to the same attractions in 2019.

The total number of visits to ALVA (Association of Leading Visitor Attractions) sites in the South East of England in 2023 was 8% up on the previous year. The 2023 figures still represented a decline of 5% in the volume of visits to the same attractions in 2019.

Visit Kent's Annual Business Barometer for 2023 shows that visitor attractions in the county saw an increase of 7.1% in footfall compared to 2022.

The report also shows that visitor information centres (VICs) across Kent experienced a 22% increase in footfall in 2023 compared to 2022.

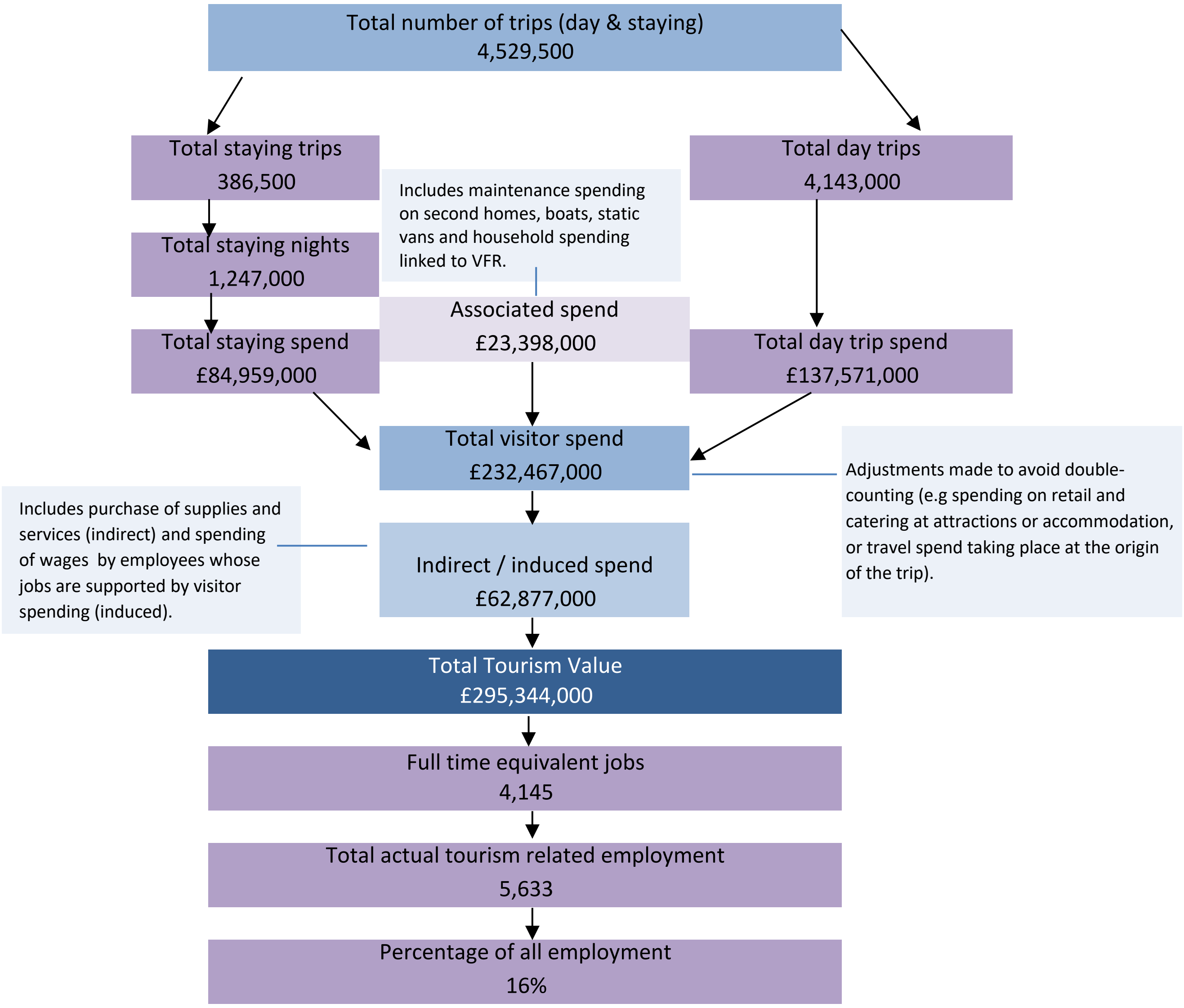
Overseas tourism

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, 292.9m 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 £31.1bn during 2023, up 17% vs 2022. Taking inflation into account, visitor spend was up 9% vs 2022.

The South East of England registered 4.3 million inbound visits during 2023 (up 18% from 3.6 million trips in 2022). These trips contributed a total of £2.48 billion in spend (up 8% from £2.29 billion in 2022).

Economic Impact of Tourism – Headline Figures   White Cliffs Country (Dover District)

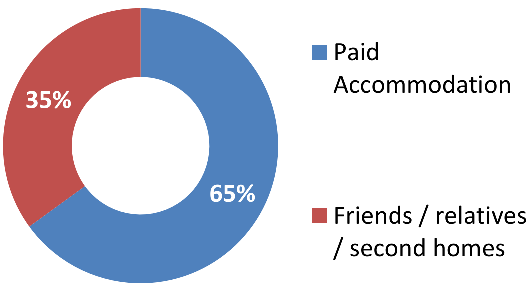


Economic Impact of Tourism – year-on-year comparisons

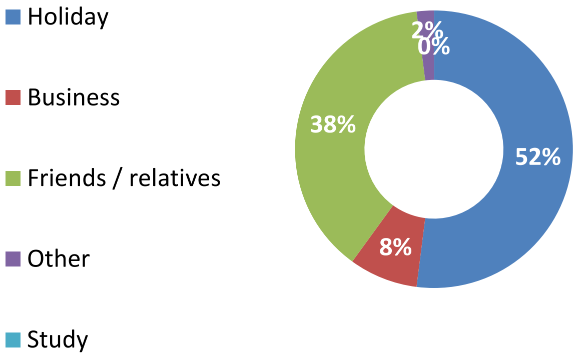
				Year-on-year comparison	Pre-pandemic levels
Day Trips	**2023**	**2021**	**2019**	**2023 v 2021**	**2023 v 2019**
Day trips volume	4,143,000	3,737,000	4,265,000	11%	-3%
Day trips value	£137,571,000	£99,575,000	£141,089,000	38%	-2%
Overnight trips					
Number of trips	386,500	280,100	424,000	38%	-9%
Number of nights	1,247,000	880,000	1,393,000	42%	-10%
Trip value	£84,959,000	£54,898,000	£86,702,000	55%	-2%
Total value	£295,344,000	£201,301,000	£302,490,000	**47%**	**-2%**
Actual jobs	5,633	4,522	6,071	**25%**	**-7%**

	2023	**2021**	**2019**	**2023 v 2021**	**2023 v 2019**
Average length stay (nights x trip)	3.23	3.14	3.29	2.9%	-1.8%
Spend x overnight trip	£219.82	£195.99	£204.49	12.2%	7.5%
Spend x night	£68.13	£62.38	£62.24	9.2%	9.5%
Spend x day trip	£33.21	£26.65	£33.08	24.6%	0.4%

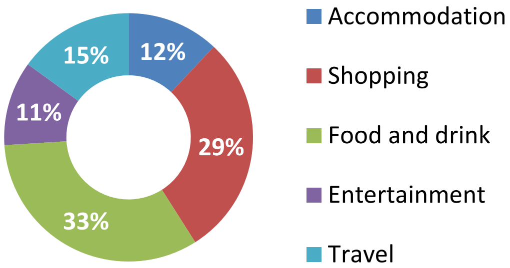
Trips by type of accommodation



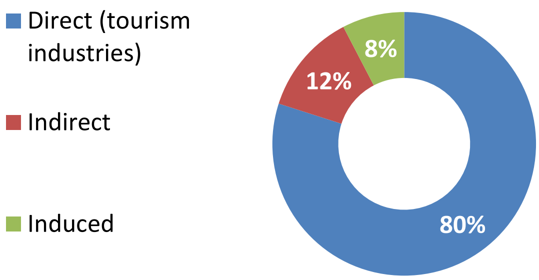
Trips by Purpose



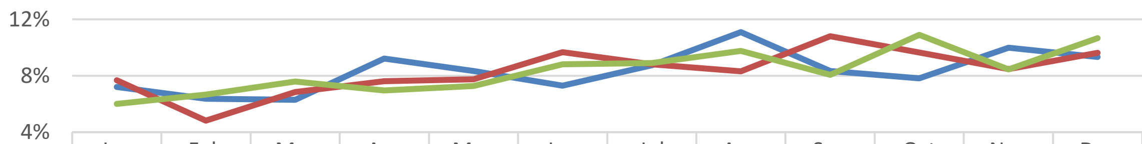
Breakdown of Expenditure



Type of Employment



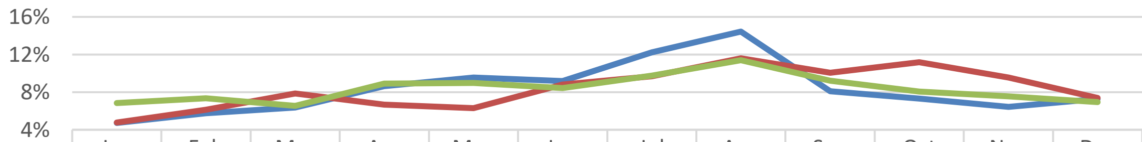
Seasonality - Day trip expenditure (South East England)



	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%
2022	8%	5%	7%	8%	8%	10%	9%	8%	11%	10%	8%	10%
2023	6%	7%	8%	7%	7%	9%	9%	10%	8%	11%	8%	11%

2019 2022 2023

Seasonality - Overnight expenditure (South East 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%
2022	5%	6%	8%	7%	6%	9%	10%	12%	10%	11%	10%	7%
2023	7%	7%	7%	9%	9%	8%	10%	11%	9%	8%	8%	7%

2019 2022 2023

Source: VisitBritain. Reference: South East of England

Volume of Tourism

Staying visits in the county context

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	269	124.5
Canterbury	422	212.0
Dartford	132	47.0
Dover	296	90.5
Folkestone & Hythe	319	79.0
Gravesham	126	42.0
Maidstone	263	71.8
Medway	359	114.5
Sevenoaks	141	64.1
Swale	287	40.5
Thanet	315	171.3
Tonbridge and Malling	176	40.3
Tunbridge Wells	221	60.4
Kent	**3,326**	**1,157.9**

Staying nights in the county context	Domestic nights ('000)	Overseas nights ('000)
Ashford	597	486.9
Canterbury	1,184	1,230.0
Dartford	364	225.5
Dover	819	428.0
Folkestone & Hythe	897	392.0
Gravesham	328	195.0
Maidstone	655	427.0
Medway	1,120	645.0
Sevenoaks	337	330.0
Swale	993	228.0
Thanet	847	1,136.0
Tonbridge and Malling	498	218.8
Tunbridge Wells	590	264.0
Kent	**9,229**	**6,206.2**

Expenditure in the county context	Domestic spend (millions)	Overseas spend (millions)
Ashford	£44.7	£30.1
Canterbury	£68.4	£64.4
Dartford	£19.1	£11.6
Dover	£60.9	£24.1
Folkestone & Hythe	£57.5	£19.8
Gravesham	£16.2	£10.3
Maidstone	£35.9	£24.8
Medway	£52.4	£29.7
Sevenoaks	£22.8	£17.3
Swale	£44.4	£11.0
Thanet	£54.6	£67.5
Tonbridge and Malling	£25.7	£12.1
Tunbridge Wells	£37.0	£21.5
Kent	**£539.6**	**£344.2**

Staying Visitors - Accommodation Type   White Cliffs Country (Dover District)

Trips by Accommodation

	UK		Overseas		Total	
Serviced	137,000	46%	45,000	50%	182,000	47%
Self-catering	26,000	9%	4,000	5%	30,000	8%
Camping	13,000	5%	3,000	3%	16,000	4%
Static caravans	6,000	2%	2,000	2%	8,000	2%
Group/campus	1,000	0%	500	1%	1,500	1%
Paying guest	0	0%	0	0%	0	0%
Second homes	6,000	2%	3,000	3%	9,000	2%
Boat moorings	7,000	2%	0	0%	7,000	2%
Other	4,000	1%	1,000	1%	5,000	1%
Friends & relatives	96,000	33%	32,000	35%	128,000	33%
Total 2023	**296,000**		**90,500**		**386,500**	
Comparison 2021	**257,000**		**23,100**		**280,100**	
Difference	**15%**		**292%**		**38%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	318,000	39%	101,000	24%	419,000	34%
Self-catering	48,000	6%	52,000	12%	100,000	8%
Camping	33,000	4%	11,000	2%	44,000	4%
Static caravans	34,000	4%	4,000	1%	38,000	3%
Group/campus	2,000	0%	7,000	2%	9,000	1%
Paying guest	0	0%	6,000	1%	6,000	0%
Second homes	23,000	3%	20,000	5%	43,000	3%
Boat moorings	49,000	6%	0	0%	49,000	4%
Other	14,000	2%	4,000	1%	18,000	1%
Friends & relatives	298,000	36%	223,000	52%	521,000	42%
Total 2023	**819,000**		**428,000**		**1,247,000**	
Comparison 2021	**778,000**		**102,000**		**880,000**	
Difference	**5%**		**320%**		**42%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£42,653,000	70%	£10,587,000	44%	£53,240,000	62%
Self-catering	£3,781,000	6%	£2,315,000	10%	£6,096,000	7%
Camping	£976,000	2%	£467,000	2%	£1,443,000	2%
Static caravans	£1,250,000	2%	£225,000	1%	£1,475,000	2%
Group/campus	£71,000	0%	£394,000	2%	£465,000	1%
Paying guest	£0	0%	£347,000	1%	£347,000	1%
Second homes	£1,039,000	2%	£730,000	3%	£1,769,000	2%
Boat moorings	£1,463,000	2%	£0	0%	£1,463,000	2%
Other	£1,479,000	3%	£366,000	1%	£1,845,000	2%
Friends & relatives	£8,190,000	13%	£8,626,000	36%	£16,816,000	19%
Total 2023	**£60,902,000**		**£24,057,000**		**£84,959,000**	
Comparison 2021	**£48,945,000**		**£5,953,000**		**£54,898,000**	
Difference	**24%**		**304%**		**55%**	

Serviced accommodation includes hotels, guesthouses, inns, B&B's 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

White Cliffs Country (Dover District)

Trips by Purpose

		UK		Overseas		Total	
Holiday		159,800	54%	41,600	46%	201,400	52%
Business		17,800	6%	12,700	14%	30,500	8%
Friends & relatives		112,500	38%	34,400	38%	146,900	38%
Other		5,900	2%	900	1%	6,800	2%
Study		0	0%	900	1%	900	0%
Total	**2023**	**296,000**		**90,500**		**386,500**	
Comparison	**2021**	**257,000**		**23,100**		**280,100**	
Difference		**15%**		**292%**		**38%**	

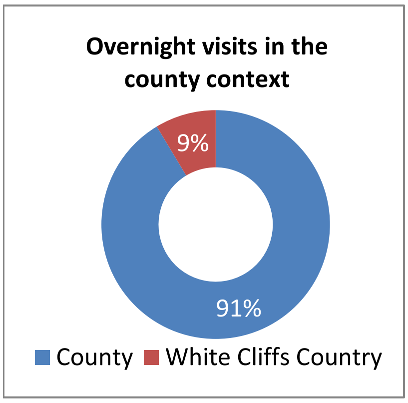
Nights by Purpose

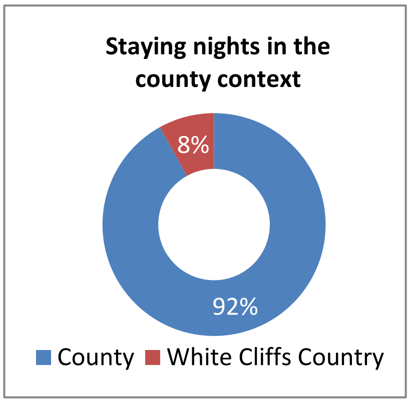
		UK		Overseas		Total	
Holiday		516,000	63%	154,100	36%	670,100	54%
Business		41,000	5%	34,300	8%	75,300	6%
Friends & relatives		245,600	30%	209,700	49%	455,300	37%
Other		16,400	2%	12,800	3%	29,200	2%
Study		0	0%	17,100	4%	17,100	1%
Total	**2023**	**819,000**		**428,000**		**1,247,000**	
Comparison	**2021**	**778,000**		**102,000**		**880,000**	
Difference		**5%**		**320%**		**42%**	

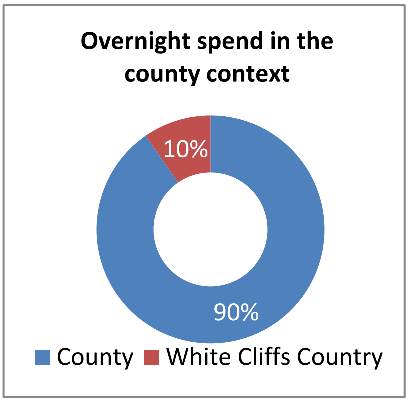
Spend by Purpose

		UK		Overseas		Total	
Holiday		£37,759,200	62%	£10,344,500	43%	£48,103,700	57%
Business		£9,744,500	16%	£1,924,600	8%	£11,669,100	14%
Friends & relatives		£9,744,100	16%	£10,103,900	42%	£19,848,000	23%
Other		£3,654,200	6%	£962,300	4%	£4,616,500	5%
Study		£0	0%	£721,700	3%	£721,700	1%
Total	**2023**	**£60,902,000**		**£24,057,000**		**£84,959,000**	
Comparison	**2021**	**£48,945,000**		**£5,953,000**		**£54,898,000**	
Difference		**24%**		**304%**		**55%**	

Proportion of staying visits in the county context





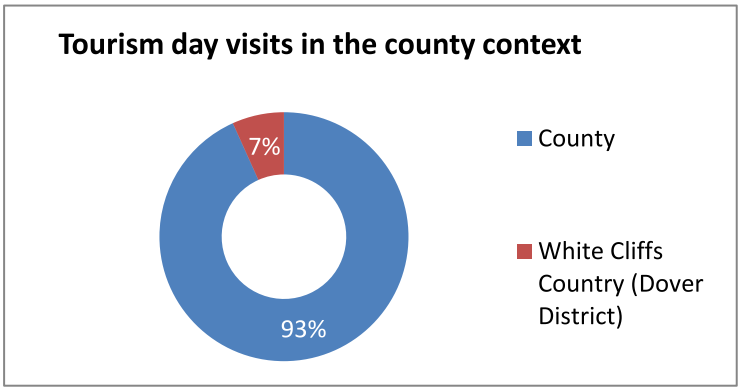


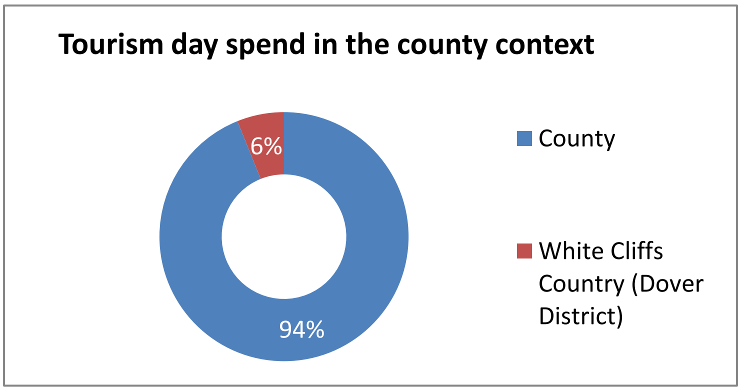
Total Volume and Value of Day Trips

		Trips	Spend
Total	**2023**	**4,143,000**	**£137,571,000**
Comparison	2021	3,737,000	£99,575,000
Difference		11%	38%

Day Visitors in the County Context

District	Day visits (millions)	Day visits Spend (millions)
Ashford	4.1	£152.5
Canterbury	7.5	£269.4
Dartford	10.3	£421.1
Dover	4.1	£137.6
Folkestone & Hythe	4.3	£134.4
Gravesham	2.1	£64.6
Maidstone	4.2	£153.8
Medway	4.4	£165.7
Sevenoaks	4.1	£157.7
Swale	5.0	£158.9
Thanet	4.1	£163.0
Tonbridge and Malling	2.9	£100.9
Tunbridge Wells	4.4	£175.6
Kent	**61.5**	**£2,255.2**





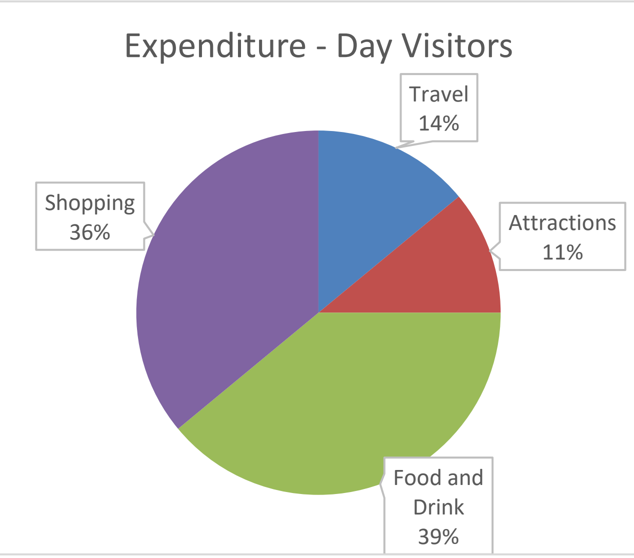
Value of Tourism

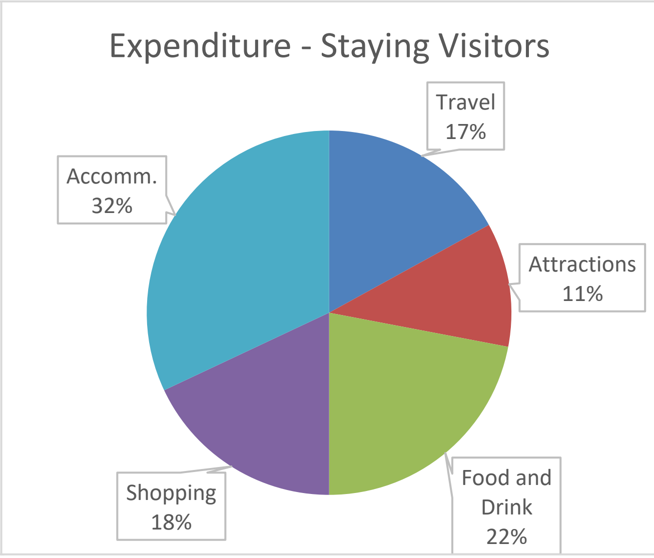
Expenditure Associated with Trips

White Cliffs Country (Dover District)

Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£20,706,700	£8,526,300	£13,398,400	£6,699,200	£11,571,400	£60,902,000
Overseas tourists		£6,495,400	£6,976,500	£5,533,100	£2,646,300	£2,405,700	£24,057,000
Total Staying		£27,202,100	£15,502,800	£18,931,500	£9,345,500	£13,977,100	£84,959,000
Total Staying (%)		32%	18%	22%	11%	17%	100%
Total Day Visitors		£0	£49,525,600	£53,652,700	£15,132,800	£19,259,900	£137,571,000
Total Day Visitors (%)		0%	36%	39%	11%	14%	100%
Total	**2023**	**£27,202,100**	**£65,028,400**	**£72,584,200**	**£24,478,300**	**£33,237,000**	**£222,530,000**
%		**12%**	**29%**	**33%**	**11%**	**15%**	**100%**
Comparison	**2021**	**£16,423,100**	**£43,549,000**	**£54,043,900**	**£17,051,700**	**£23,405,300**	**£154,473,000**
Difference		**66%**	**49%**	**34%**	**44%**	**42%**	**44%**





Other Expenditure Associated with Tourism Activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£531,000	£770,000	£5,000	£22,092,000	£23,398,000

Spend on second homes is assumed to be an average of £2,150 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,150 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 £2,150. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £210 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 Visitors	Day Visitors	Total
Accommodation		£27,307,000	£1,082,000	£28,389,000
Retail		£15,272,000	£48,393,000	£63,665,000
Catering		£18,594,000	£52,498,000	£71,092,000
Attractions		£9,512,000	£16,220,000	£25,732,000
Transport		£8,564,000	£11,627,000	£20,191,000
Non-trip spend		£23,398,000	£0	£23,398,000
Total Direct	**2023**	**£102,647,000**	**£129,820,000**	**£232,467,000**
Comparison	**2021**	**£64,355,000**	**£93,821,000**	**£158,176,000**
Difference		**60%**	**38%**	**47%**

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		£16,737,000	£22,287,000	£39,024,000
Non-trip spending		£3,510,000	£0	£3,510,000
Income induced		£10,404,000	£9,939,000	£20,343,000
Total	**2023**	**£30,651,000**	**£32,226,000**	**£62,877,000**
Comparison	**2021**	**£16,941,000**	**£26,184,000**	**£43,125,000**
Difference		**81%**	**23%**	**46%**

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		£102,647,000	£129,820,000	£232,467,000
Indirect		£30,651,000	£32,226,000	£62,877,000
Total Value	**2023**	**£133,298,000**	**£162,046,000**	**£295,344,000**
Comparison	**2021**	**£81,296,000**	**£120,005,000**	**£201,301,000**
Difference		**64%**	**35%**	**47%**

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 visitor spending. A new full time equivalent tourism job is created with every £54,000 increase in tourism revenue.

Direct Employment

Full-time equivalent (FTE)							
		Staying Visitors		Day Visitors		Total	
Accommodation		488	30%	16	1%	504	16%
Retail		187	11%	503	33%	690	22%
Catering		314	19%	717	47%	1,031	33%
Entertainment		132	8%	191	13%	323	10%
Transport		75	5%	86	6%	161	5%
Non-trip spend		433	27%	0	0%	433	14%
Total FTE	**2023**	**1,629**		**1,513**		**3,142**	
Comparison	**2021**	**1,195**		**1,371**		**2,566**	
Difference		**36%**		**10%**		**22%**	

Estimated actual jobs							
		Staying Visitors		Day Visitors		Total	
Accommodation		721	32%	24	1%	745	17%
Retail		281	12%	754	34%	1,035	23%
Catering		471	21%	1,076	48%	1,547	34%
Entertainment		186	8%	269	12%	455	10%
Transport		106	5%	121	5%	227	5%
Non-trip spend		494	22%	0	0%	494	11%
Total Actual	**2023**	**2,259**		**2,244**		**4,503**	
Comparison	**2021**	**1,673**		**2,037**		**3,710**	
Difference		**35%**		**10%**		**21%**	

Indirect & Induced Employment

Full-time equivalent (FTE)				
		Staying Visitors	Day Visitors	Total
Indirect jobs		298	328	626
Induced jobs		193	184	377
Total FTE	**2023**	**491**	**512**	**1,003**
Comparison	**2021**	**288**	**432**	**720**
Difference		**70%**	**19%**	**39%**

Estimated actual jobs				
		Staying Visitors	Day Visitors	Total
Indirect jobs		333	367	700
Induced jobs		220	210	430
Total Actual	**2023**	**553**	**577**	**1,130**
Comparison	**2021**	**325**	**487**	**812**
Difference		**70%**	**18%**	**39%**

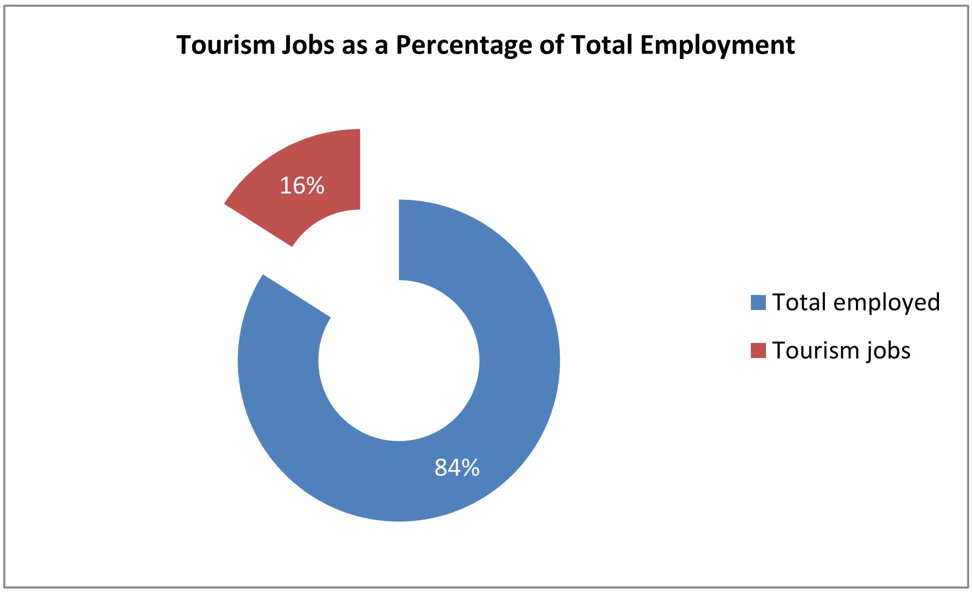
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full-time equivalent (FTE)							
		Staying Visitors		Day Visitors		Total	
Direct		1,629	77%	1,513	75%	3,142	76%
Indirect		298	14%	328	16%	626	15%
Induced		193	9%	184	9%	377	9%
Total FTE	**2023**	**2,120**		**2,025**		**4,145**	
Comparison	**2021**	**1,483**		**1,803**		**3,286**	
Difference		**43%**		**12%**		**26%**	

Estimated actual jobs							
		Staying Visitors		Day Visitors		Total	
Direct		2,259	80%	2,244	80%	4,503	80%
Indirect		333	12%	367	13%	700	12%
Induced		220	8%	210	7%	430	8%
Total Actual	**2023**	**2,812**		**2,821**		**5,633**	
Comparison	**2021**	**1,998**		**2,524**		**4,522**	
Difference		**41%**		**12%**		**25%**	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitors	Day Visitors	Total
Total employed		37,000	37,000	37,000
Tourism jobs		2,812	2,821	5,633
Proportion all jobs		**8%**	**8%**	**16%**
Comparison	**2021**	**1,998**	**2,524**	**4,522**
Difference		**41%**	**12%**	**25%**



The key 2023 results of the Economic Impact Assessment are:

4.5 million trips were undertaken in the area.
4.1 million day trips.
0.4 million overnight visits**.**

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

£232 million spent by tourists during their visit to the area.
£19 million spent on average in the local economy each month.

£85 million generated by overnight visits.
£138 million generated from day trips.

£295 million spent in the local area as result of tourism, taking into account multiplier effects.

5,633 jobs supported, both for local residents and from those living nearby.
4,503 tourism jobs directly supported.
1,130 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.

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 provides 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 a 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 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 is 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 income-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 2023

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. Datasets used to produce the 2023 results include:

Kent
- Kent Annual Business Barometer report with 2023 figures compared to 2022.
- Headline STR data including occupancy, ADR and RevPAR for 2023, 2022 and 2021.
- Any information on major openings or closures in 2023.
- Short-term rental accommodation data.

Ashford
- Footfall data for Park Mall Shopping Centre, Elwick Place and Ashford town centre.
- Car parking data for main car parks in Ashford and Tenterden.
- Any information on major openings and closures.

Canterbury
- Footfall data for 2021 and 2023.
- Annual events calendar for 2023.

Dover
- Footfall figures from National Trust.
- Parking data at car parks in the district and on-street parking.
- Footfall in Deal, Dover and Sandwich town centres.

Gravesham
- Gravesend footfall figures for 2020/2021 to 2022/2023.
- Car Parking data.
- Hotel closures / temporary change of use.

Sevenoaks
- Any information on major openings and closures (ongoing projects and consultation).

Swale
- Swale car park income from 2021 through 2023/2024.
- Retail data.

Thanet
- Footfall data for Margate, Broadstairs and Ramsgate.
- Data from Southeastern, Port Ramsgate and TDC parking and local attractions.

Tunbridge Wells
- Events (Pub in the Park, Kings Coronation events, Spa Valley Railway Beer and Cider Festival, Pantiles Antiques Fair, MELA festival, Cranbrook Goes Nuts Festival).
- Car Parking data.

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