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delivering results : measuring what matters

Economic Impact of Tourism
Brighton and Hove - 2022

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Total number of trips (day & staying)
11,500,000

Total staying trips
1,528,000

Total day trips
9,972,000

Total staying nights
5,200,000

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

Associated spend
£29,020,000

Total staying spend
£482,087,000

Total day trip spend
£369,450,000

Total visitor spend
£880,557,000

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
£389,869,000

Total Tourism Value
£1,270,426,000

Full time equivalent jobs
17,583

Total actual tourism related employment
23,345

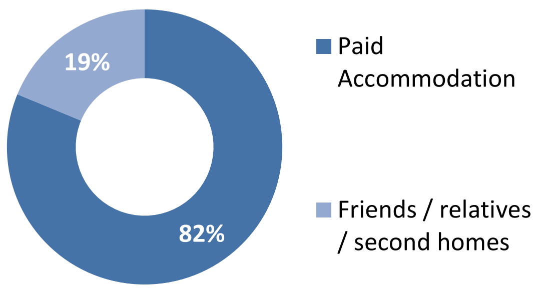
Percentage of all employment
16.3%

Economic Impact of Tourism – Year on year comparisons

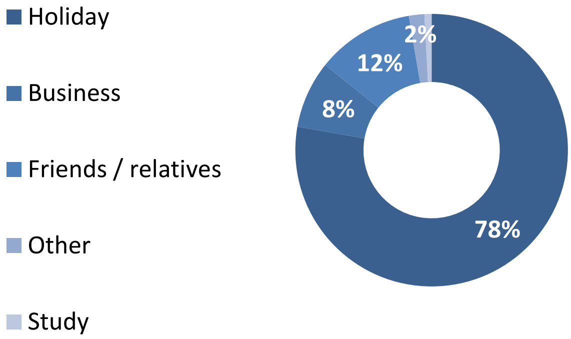
				Year-on-year comparison	Pre-pandemic levels
Day Trips	**2022**	**2021**	**2019**	**2022 v 2021**	**2022 v 2019**
Day trips Volume	9,972,000	9,088,000	10,700,000	10%	-7%
Day trips Value	£369,450,000	£301,418,000	£384,000,000	23%	-4%
Overnight trips					
Number of overnight trips	1,528,000	899,000	1,665,000	70%	-8%
Number of nights	5,200,000	2,818,000	5,460,000	85%	-5%
Overnight trip value	£515,303,000	£302,933,000	£576,374,000	70%	-11%
Total Value	**£1,270,426,000**	**£874,489,000**	**£1,303,218,000**	**45%**	**-3%**
Actual Jobs	**23,345**	**17,751**	**24,152**	**32%**	**-3%**

	2022	2021	2019	2022 v 2021	2022 v 2019
Average length stay (nights x trip)	3.41	3.14	3.28	8.6%	3.9%
Spend x overnight trip	£337.68	£337.34	£346.17	0.1%	-2.5%
Spend x night	£99.10	£107.50	£105.56	-7.8%	-6.1%
Spend x day trip	£39.59	£35.45	£37.38	11.7%	5.9%

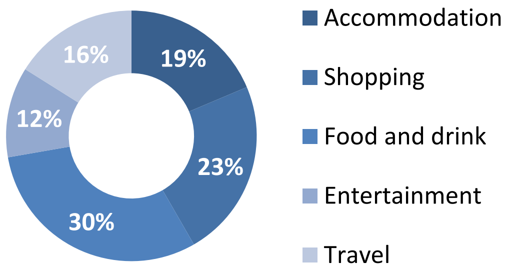
Type of Accommodation



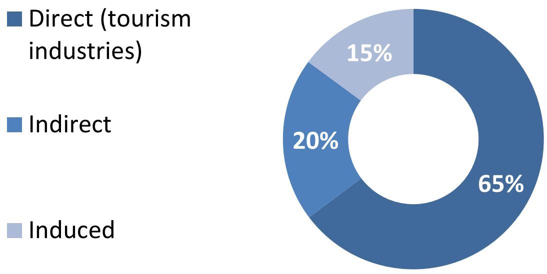
Trips by Purpose



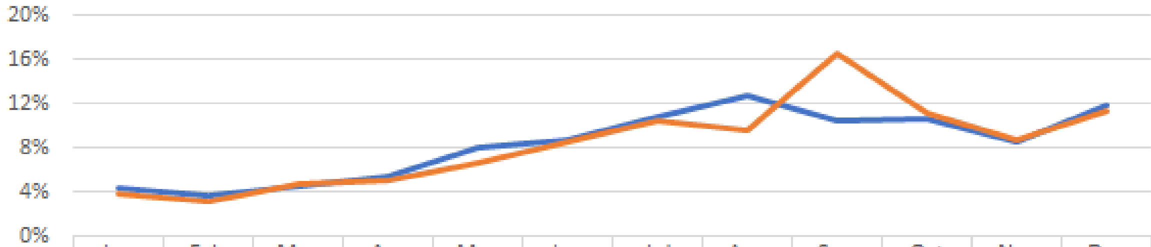
Breakdown of expenditure



Type of employment



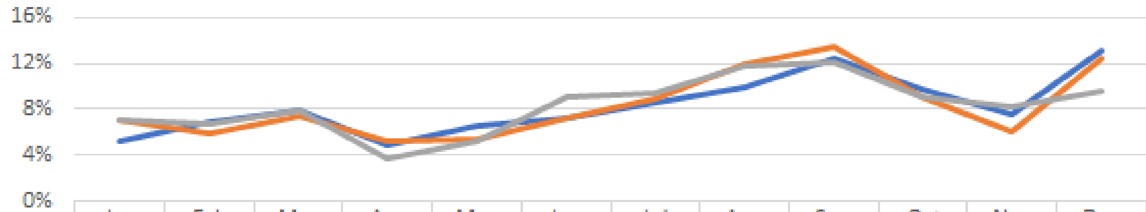
Tourism Day Trips - South East



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trips	4%	4%	5%	5%	8%	9%	11%	13%	10%	11%	9%	12%
Value	4%	3%	5%	5%	7%	9%	10%	10%	17%	11%	9%	11%

Trips Value

Domestic overnight trips - South East



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trips	5%	7%	8%	5%	6%	7%	9%	10%	12%	10%	8%	13%
Nights	7%	6%	7%	5%	5%	7%	9%	12%	13%	9%	6%	12%
Spend	7%	7%	8%	4%	5%	9%	9%	12%	12%	9%	8%	10%

Trips Nights Spend

Introduction

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2022 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 from the COVID-19 pandemic.

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.

Results for 2022

After two years where we had very limited access to data, the 2022 results are based on the key national tourism surveys, which have recently been fully operational and upgraded.

Overall, the balance of domestic versus overseas travel is becoming closer to pre-pandemic levels, but financial pressures mean that domestic trips were preferred, so an element of staycation preference still remains. Inbound visits to the UK continued to recover to pre-pandemic levels. Overall, the 2022 results will show significant improvements compared to 2021, although they are still slightly behind the level of spending seen in 2019.

Domestic tourism

GB Day Visits Survey (Day visits)

Overall in 2022, there were 945 million Tourism Day Visits in England with Q3 and Q4 seeing the highest volume of visits. Throughout all 12 months of 2022, visitors spent £38.7 billion. The last two quarters on 2022 accounted for the highest spent.

In the latter 9 months of 2021, British residents took a total of 545 million Tourism Day Visits within England and spent £21.19 bn on these trips. In 2022, as COVID-19 restrictions came to a halt in all nations, domestic day trips picked up 41% to reach 772 million Tourism Day Visits from April to December 2022 whilst spend was up 46% to £31.2 billion. The average spent on Tourism Day Visits to England in the last 9 months of 2021 was £39, increasing by 4% in 2022 to £40.

The South East of England registered 162 million tourism day trips made by British residents between January to December 2022. These trips accounted for a total of £5.86 billion in spend.

The South East of England as a destination shows an increase in both volume and value in the latter 9 months of 2022 vs 2021. The volume of trips increased by 41% and the total spend by 47%.

GB Tourism Survey (Overnight visits)

England registered 107 million overnight trips made by British residents between January to December 2022. These trips accounted for a total of 316 million nights and contributed a total of £27.6 billion in spend.

In 2022, overnight trips in England had an average length of 3.0 nights with an average spend per trip £258 and average spend per night £87.

England as a destination shows an increase in both volume and value in the latter 9 months of 2022 vs 2021. The volume of trips increased by 16% and the total spend by 36%.

South East of England registered 15.8 million overnight trips made by British residents between January to December 2022. These trips accounted for a total of 46 million nights and contributed a total of £3.52 billion in spend.

The South East of England as a destination shows an increase in both volume and value in 2022 vs 2021. The volume of trips increased by 12% and the total spend by 41%.

Overseas tourism

Visits to England

Inbound visits to England continued to recover to pre-pandemic levels (i.e. 2019), following two years of extremely low visits due to the impact of COVID-19. England hosted a little over 29.3 million international visits in 2022, 24% fewer than in 2019. Visitors spent £22.6 billion in the region in 2022, 9% below the record spend set in 2019.

South East

Visits to the South East made by international visitors in 2022 were down 32% on 2019 results at 3.6 million. Visitors spent £2.3 billion in the region in 2022, 11% below the record spend set in 2019.

Bicester Village

Visits to Bicester Village are included in the day trips count. Pre-pandemic, Bicester Village attracted more than 7 million visitors per year and about two-thirds of all visitors are included in the Cambridge Model calculations (c4.6 million in 2019).

We understand that about 40 percent of sales in 2022 were to shoppers from overseas and the Middle East accounted for half of that. The rest are UK residents from London (40%) and the reminder of the UK (20%). Based on the VisitBritain estimates the latest volume of visits to be closer to 6 million. Two-thirds of these visits (4 million) have been included in the calculations.

Comparability

The domestic tourism statistics are based on a new combined online survey that replaces the separate Great Britain Tourism Survey and Great Britain Day Visits Survey that ran until 2019.

From 2021 definition and survey methodology changes have been introduced meaning that results published for April 2021 onwards are not directly comparable with data published for 2019 and previous years. In order to gain as complete a picture of domestic tourism as possible, we have used data from a number of different information sources including:

Visits to Visitor attractions

An audit of English visitor attractions, recording visitor numbers since 2000.

England - Admissions volume	2019	2020	2021	2022
Number of visits (million)	257.52	90.13	117.17	166.52
% difference from 2019 visit volume		-65.0%	-55.0%	-35.0%
South East				
% difference from 2019 visit volume		-58.0%	-51.0%	-41.0%

Accommodation Occupancy

Every month, the England Occupancy Survey (EOS) measures bedroom and bedspace occupancy across the serviced accommodation sector, including mostly hotels, with a very small proportion of serviced apartments and larger B&Bs/guesthouses.

Accommodation Occupancy - Room Occupancy - England		
Year	**Average annual room occupancy**	**Difference from 2019**
2019	77.7%	
2021	51.5%	-26.2%
2022	73.4%	-4.3%

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	944,000	72%	42,000	20%	986,000	65%
Self catering	137,000	10%	10,000	5%	147,000	10%
Camping	7,000	1%	1,000	0%	8,000	1%
Static caravans	0	0%	0	0%	0	0%
Group/campus	38,000	3%	2,000	1%	40,000	3%
Paying guest	0	0%	50,000	23%	50,000	3%
Second homes	1,000	0%	1,000	0%	2,000	0%
Boat moorings	11,000	1%	0	0%	11,000	1%
Other	4,000	0%	2,000	1%	6,000	0%
Friends & relatives	169,000	13%	108,000	50%	277,000	18%
Total 2022	**1,311,000**		**215,000**		**1,526,000**	
Comparison 2021	**754,000**		**144,000**		**898,000**	
Difference	**74%**		**49%**		**70%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	1,979,000	53%	118,000	8%	2,097,000	40%
Self catering	791,000	21%	78,000	5%	869,000	17%
Camping	26,000	1%	2,000	0%	28,000	1%
Static caravans	0	0%	0	0%	0	0%
Group/campus	239,000	6%	14,000	1%	253,000	5%
Paying guest	0	0%	283,000	20%	283,000	5%
Second homes	8,000	0%	6,000	0%	14,000	0%
Boat moorings	38,000	1%	0	0%	38,000	1%
Other	12,000	0%	3,000	0%	15,000	0%
Friends & relatives	661,000	18%	944,000	65%	1,605,000	31%
Total 2022	**3,753,000**		**1,447,000**		**5,200,000**	
Comparison 2021	**2,014,000**		**804,000**		**2,818,000**	
Difference	**86%**		**80%**		**85%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£291,757,000	73%	£25,638,000	22%	£317,395,000	62%
Self catering	£56,626,000	14%	£5,737,000	5%	£62,363,000	12%
Camping	£1,186,000	0%	£142,000	0%	£1,328,000	0%
Static caravans	£0	0%	£0	0%	£0	0%
Group/campus	£5,308,000	1%	£1,489,000	1%	£6,797,000	1%
Paying guest	£0	0%	£29,276,000	25%	£29,276,000	6%
Second homes	£747,000	0%	£1,298,000	1%	£2,045,000	0%
Boat moorings	£3,441,000	1%	£0	0%	£3,441,000	1%
Other	£636,000	0%	£206,000	0%	£842,000	0%
Friends & relatives	£38,538,000	10%	£53,278,000	46%	£91,816,000	18%
Total 2022	**£398,239,000**		**£117,064,000**		**£515,303,000**	
Comparison 2021	**£212,372,000**		**£90,561,000**		**£302,933,000**	
Difference	**88%**		**29%**		**70%**	

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		1,054,000	80%	135,000	62%	1,189,000	78%
Business		106,000	8%	16,000	7%	122,000	8%
Friends & relatives		134,000	10%	43,000	20%	177,000	12%
Other		18,000	1%	10,000	5%	28,000	2%
Study		0	0%	13,000	6%	13,000	1%
Total	**2022**	**1,311,000**		**217,000**		**1,528,000**	
Comparison	**2021**	**754,000**		**145,000**		**899,000**	
Difference		**74%**		**50%**		**70%**	

Nights by Purpose

		UK		Overseas		Total	
Holiday		3,145,000	84%	742,000	51%	3,887,000	75%
Business		168,000	4%	70,000	5%	238,000	5%
Friends & relatives		351,000	9%	355,000	25%	706,000	14%
Other		89,000	2%	28,000	2%	117,000	2%
Study		0	0%	253,000	17%	253,000	5%
Total	**2022**	**3,753,000**		**1,447,000**		**5,200,000**	
Comparison	**2021**	**2,014,000**		**804,000**		**2,818,000**	
Difference		**86%**		**80%**		**85%**	

Spend by Purpose

		UK		Overseas		Total	
Holiday		£330,079,000	83%	£66,754,000	57%	£396,833,000	77%
Business		£30,434,000	8%	£9,844,000	8%	£40,278,000	8%
Friends & relatives		£33,409,000	8%	£17,824,000	15%	£51,233,000	10%
Other		£4,317,000	1%	£2,568,000	2%	£6,885,000	1%
Study		£0	0%	£20,073,000	17%	£20,073,000	4%
Total	**2022**	**£398,239,000**		**£117,064,000**		**£515,303,000**	
Comparison	**2021**	**£212,372,000**		**£90,561,000**		**£302,933,000**	
Difference		**88%**		**29%**		**70%**	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

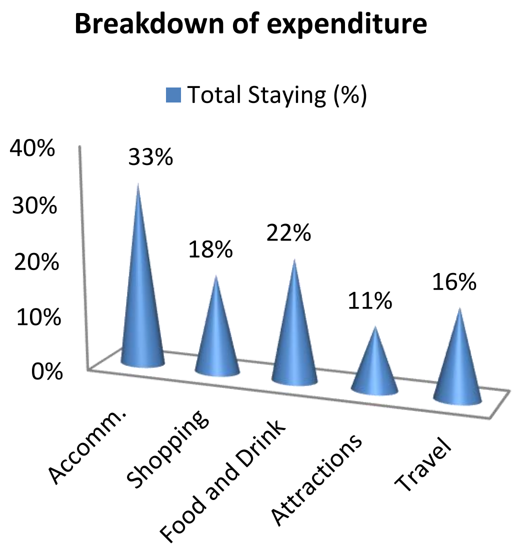
		Trips	Spend
Urban visits		4,622,000	£204,500,000
Countryside visits		1,563,000	£53,164,000
Coastal visits		3,787,000	£137,111,000
Total	**2022**	**9,972,000**	**£394,775,000**
Comparison	**2021**	**9,088,000**	**£322,200,000**
Difference		**10%**	**23%**

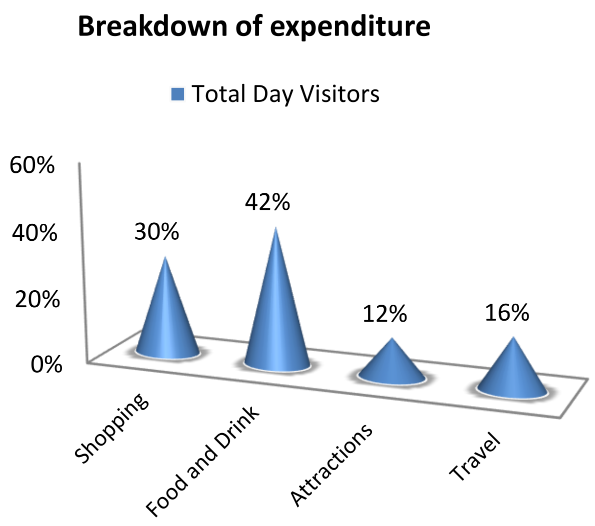
Value of Tourism

Expenditure Associated with Trips:

Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£133,585,000	£57,713,000	£88,208,000	£46,414,000	£72,318,000	£398,239,000
Overseas tourists		£36,055,000	£33,309,000	£24,674,000	£12,307,000	£10,719,000	£117,064,000
Total Staying		£169,640,000	£91,022,000	£112,882,000	£58,721,000	£83,037,000	£515,303,000
Total Staying (%)		33%	18%	22%	11%	16%	100%
Total Day Visitors		£0	£118,703,000	£165,283,000	£47,480,000	£63,309,000	£394,775,000
Total Day Visitors		0%	30%	42%	12%	16%	100%
Total	**2022**	**£169,640,000**	**£209,725,000**	**£278,165,000**	**£106,201,000**	**£146,346,000**	**£910,078,000**
%		**19%**	**23%**	**31%**	**12%**	**16%**	**100%**
Comparison	**2021**	**£93,964,000**	**£154,742,000**	**£202,328,000**	**£73,987,000**	**£100,113,000**	**£625,134,000**
Difference		**81%**	**36%**	**37%**	**44%**	**46%**	**46%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£1,600,000	£2,700,000	£0	£24,720,000	£29,020,000

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	£171,898,000	£3,306,000	£175,204,000
Retail	£90,111,000	£117,516,000	£207,627,000
Catering	£109,496,000	£160,324,000	£269,820,000
Attractions	£60,760,000	£50,319,000	£111,079,000
Transport	£49,822,000	£37,985,000	£87,807,000
Non-trip spend	£29,020,000	£0	£29,020,000
Total Direct 2022	**£511,107,000**	**£369,450,000**	**£880,557,000**
Comparison 2021	**£310,709,000**	**£301,418,000**	**£612,127,000**
Difference	**64%**	**23%**	**44%**

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	£144,245,000	£75,031,000	£219,276,000
Non trip spending	£5,804,000	£0	£5,804,000
Income induced	£102,875,000	£61,914,000	£164,789,000
Total 2022	**£252,924,000**	**£136,945,000**	**£389,869,000**
Comparison 2021	**£150,577,000**	**£111,785,000**	**£262,362,000**
Difference	**68%**	**23%**	**49%**

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	£511,107,000	£369,450,000	£880,557,000
Indirect	£252,924,000	£136,945,000	£389,869,000
Total Value 2022	**£764,031,000**	**£506,395,000**	**£1,270,426,000**
Comparison 2021	**£461,286,000**	**£413,203,000**	**£874,489,000**
Difference	**66%**	**23%**	**45%**

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		2,408	38%	46	1%	2,455	24%
Retailing		739	12%	964	24%	1,703	16%
Catering		1,450	23%	2,123	52%	3,573	34%
Entertainment		821	13%	680	17%	1,500	14%
Transport		338	5%	258	6%	595	6%
Non-trip spend		537	9%	0	0%	537	5%
Total FTE	**2022**	**6,293**		**4,070**		**10,363**	
Comparison	**2021**	**4,291**		**3,691**		**7,982**	
Difference		**47%**		**10%**		**30%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Accommodation		3,564	39%	69	1%	3,633	24%
Retailing		1,108	12%	1,446	24%	2,554	17%
Catering		2,175	24%	3,185	53%	5,360	35%
Entertainment		1,157	13%	958	16%	2,116	14%
Transport		476	5%	363	6%	839	6%
Non-trip spend		613	7%	0	0%	613	4%
Total Actual	**2022**	**9,094**		**6,020**		**15,114**	
Comparison	**2021**	**6,138**		**5,459**		**11,597**	
Difference		**48%**		**10%**		**30%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitor	Day Visitors	Total
Indirect jobs		2,779	1,389	4,168
Induced jobs		1,905	1,147	3,052
Total FTE	**2022**	**4,684**	**2,536**	**7,220**
Comparison	**2021**	**3,098**	**2,300**	**5,398**
Difference		**51%**	**10%**	**34%**

Estimated actual jobs				
		Staying Visitor	Day Visitors	Total
Indirect jobs		3,168	1,584	4,752
Induced jobs		2,172	1,307	3,479
Total Actual	**2022**	**5,339**	**2,891**	**8,231**
Comparison	**2021**	**3,532**	**2,622**	**6,154**
Difference		**51%**	**10%**	**34%**

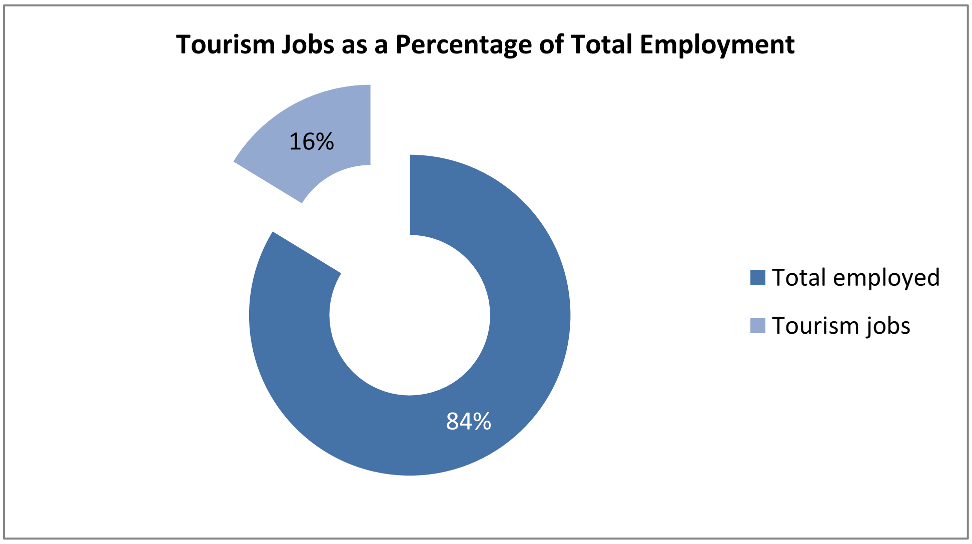
Total Jobs

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		6,293	57%	4,070	62%	10,363	59%
Indirect		2,779	25%	1,389	21%	4,168	24%
Induced		1,905	17%	1,147	17%	3,052	17%
Total FTE	**2022**	**10,977**		**6,606**		**17,583**	
Comparison	**2021**	**7,389**		**5,991**		**13,381**	
Difference		**49%**		**10%**		**31%**	
Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Direct		9,094	63%	6,020	68%	15,114	65%
Indirect		3,168	22%	1,584	18%	4,752	20%
Induced		2,172	15%	1,307	15%	3,479	15%
Total Actual	**2022**	**14,433**		**8,911**		**23,345**	
Comparison	**2021**	**9,670**		**8,081**		**17,751**	
Difference		**49%**		**10%**		**32%**	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day visitors	Total
Total employed		143,500	143,500	143,500
Tourism jobs		14,433	8,911	23,345
Proportion all jobs		**10%**	**6%**	**16%**
Comparison	**2021**	**9,670**	**8,081**	**17,751**
Difference		**49%**	**10%**	**32%**



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

It should be noted that the model cannot take into account any leakage of expenditure from tourists taking day trips out of the area in which they are staying. While it is assumed that these may broadly balance each other in many areas, in locations receiving significant numbers of day visitors from London, there is likely to be an underestimate in relation to the number of overseas day visitors staying in holiday accommodation in London.

Whilst it is important to be aware of these issues, we are confident that the estimates we have produced are as reliable as is practically possible within the constraints of the information available.

Rounding

All figures used in this report have been rounded. Therefore, in some tables there may be a slight discrepancy between totals and sub totals.

Data sources

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

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

These surveys provide information down to a regional level. In order to disaggregate data to a local level the following information sources are used:

- Records of known local accommodation stock held by Destination Research;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions ;
- Latest estimates of resident population as based on the 2011 Census of Population;
- Selected data from ONS employment-related surveys;
- Selected data on the countryside and coast including, national designations and length of the coastline (where relevant).

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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