



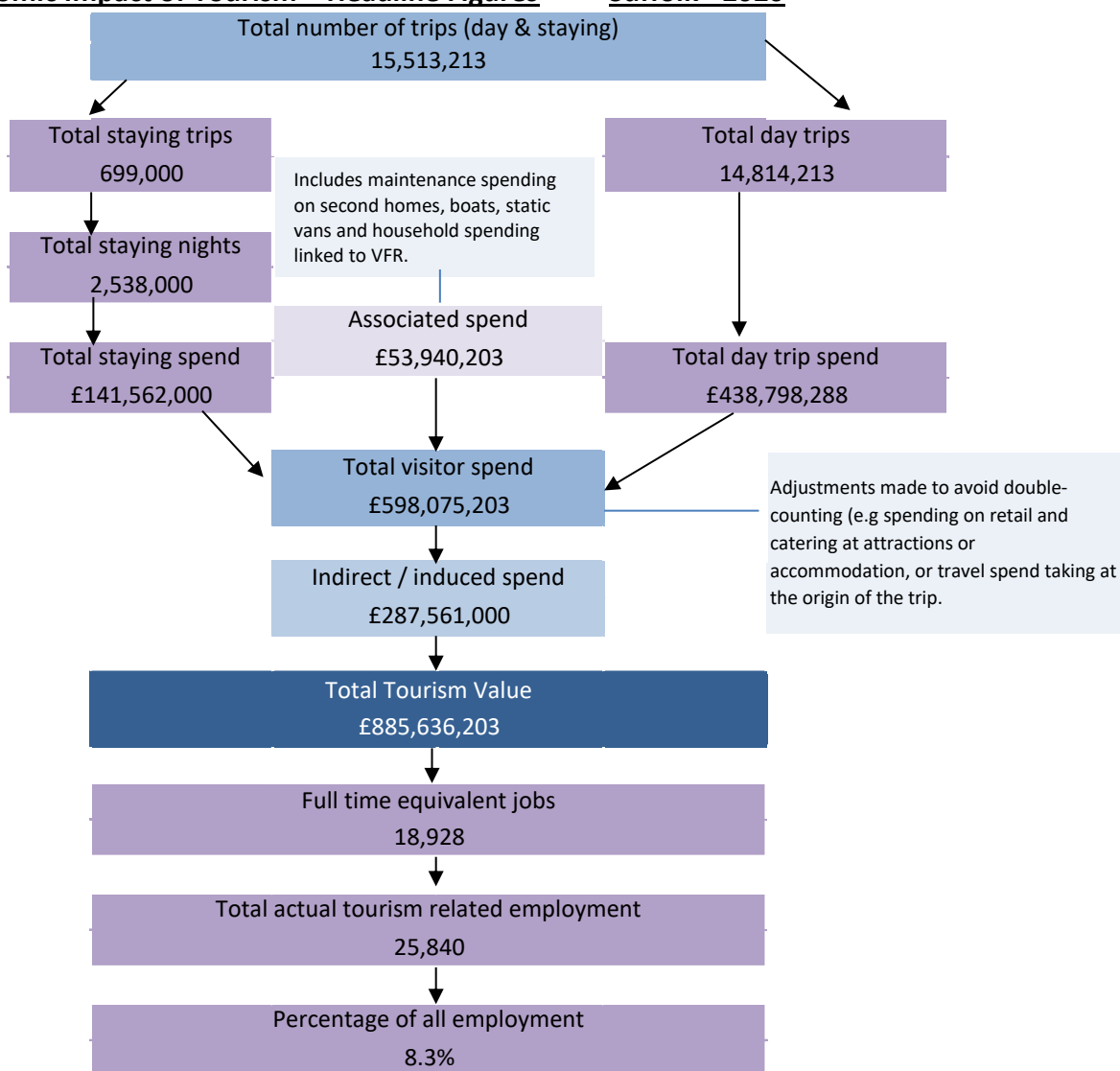
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delivering results : measuring what matters



Economic Impact of Tourism
Suffolk - 2020

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Economic Impact of Tourism – Headline Figures Suffolk - 2020

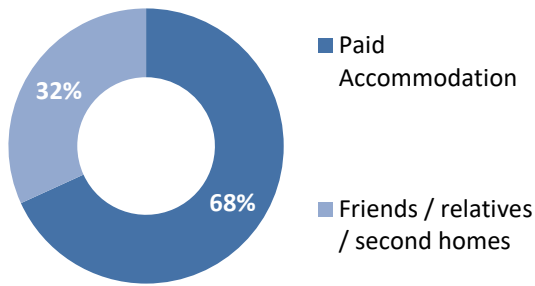


Economic Impact of Tourism – Year on year comparisons

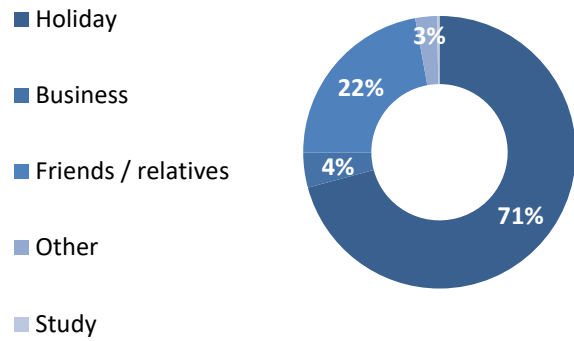
<u>Day Trips</u>	2019	2020	Annual variation
Day trips Volume	34,776,922	14,814,213	-57%
Day trips Value	£1,131,729,229	£438,798,288	-61%
<u>Overnight trips</u>			
Number of trip	1,734,000	699,000	-60%
Number of nights	6,709,000	2,538,000	-62%
Trip value	£376,934,000	£141,562,000	-62%
Total Value	£2,143,797,750	£885,636,203	-59%
Actual Jobs	44,498	25,840	-42%

	2019	2020	Variation
Average length stay (nights x trip)	3.87	3.63	-6.2%
Spend x overnight trip	£ 217.38	£ 202.52	-6.8%
Spend x night	£ 56.18	£ 55.78	-0.7%
Spend x day trip	£ 32.54	£ 29.62	-9.0%

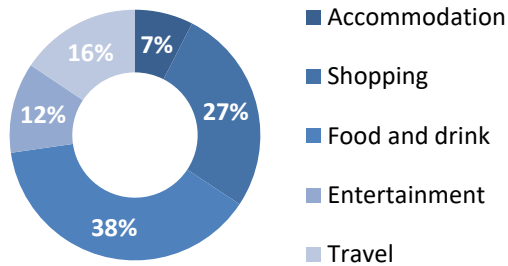
Type of Accommodation



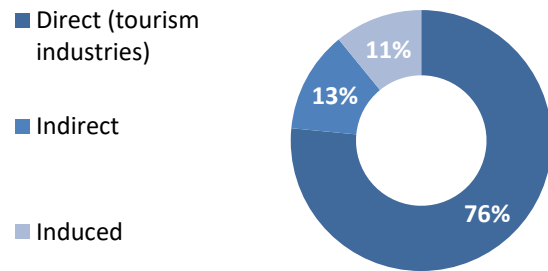
Trips by Purpose



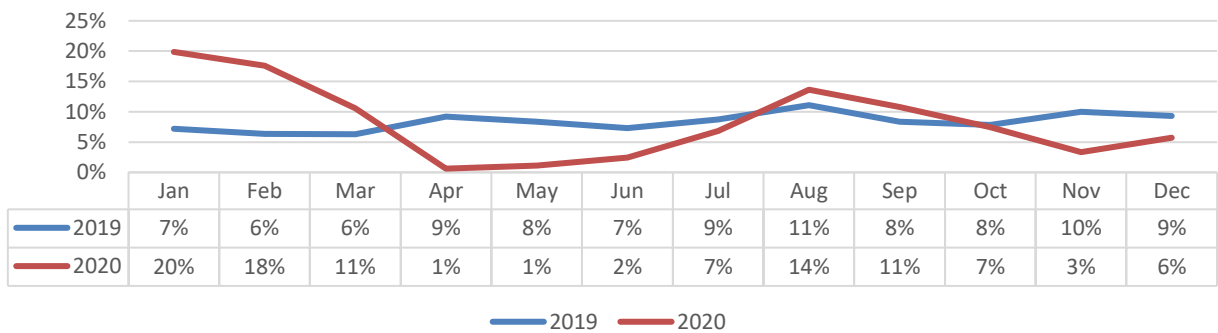
Breakdown of expenditure



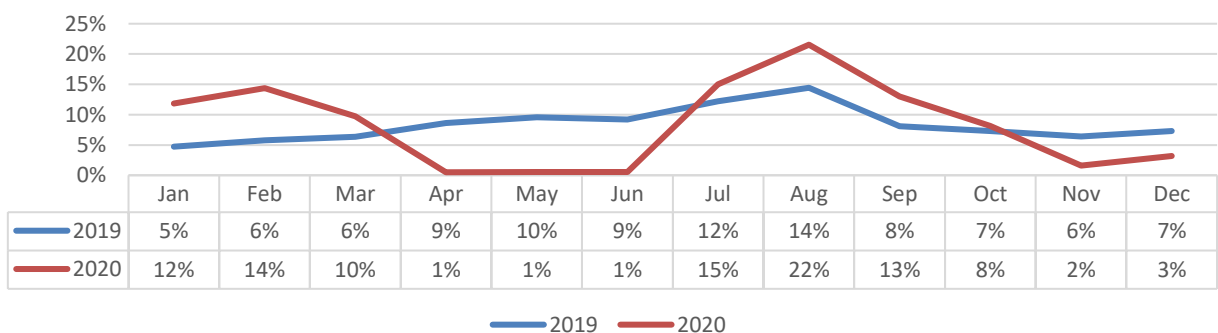
Type of employment



Seasonality - Day trip expenditure



Seasonality - Overnight expenditure



Introduction

The Cambridge Model examines the volume and value of tourism and the impact of that expenditure on the local economy. The model utilises information from national tourism surveys among other sources of information. The main national surveys used as data sources in stage one include:

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

The above reports are not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we usually apply a 3-year rolling average to this data to highlight longer-term trends, whilst helping smooth out short-term market fluctuations and reducing the impact of any methodological changes affecting the survey. As such, published results relating to 2019 are an average of 2017, 2018 and 2019 results.

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

- **Phase one: first national lockdown** - England was in national lockdown between late March and June 2020.
- **Phase two: minimal lockdown restrictions** - Most lockdown restrictions were lifted on 4 July.
- **Phase three: reimposing restrictions** - On 14 September, England's gathering restriction was tightened and people were once again prohibited from meeting more than six people socially.
- **Phase four: second national lockdown** - On 5 November, national restrictions were reintroduced in England.
- **Phase five: reintroducing a tier system** - On 2 December, the tier system was reintroduced.

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

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

Cambridge Model 2020 results – Key methodology changes

The ongoing COVID-19 pandemic has caused global disruption to the visitor economy with activity re-starting at a slow pace. There is a consensus that tourism recovery will be segmented and gradual. In order to reflect the impact of the pandemic, the 2020 results will incorporate the following methodological changes:

- The 2020 results for the three key surveys (GBTS, IPS and GBDVS) were suspended in March 2020 because of the coronavirus (COVID-19) pandemic. No data was collected for the period when the surveys were not operational.
- The full 2020 results presented in this report are based on a range of administrative sources and modelling work, using the published 2019 Cambridge Model data as a starting point. The data used in the 2020 model includes the following:
 - Locally sourced data supplied by destinations including (but not limited to) local business performance (e.g., accommodation occupancy), car parking data, annual footfall and visits to visitor attractions).
 - Consumer travel insights published by STR, Deloitte, CBI and Oxford / Tourism Economics.
 - Domestic tourism estimates produced by Visit Britain for each of the four journey purposes for domestic overnight tourism (holidays, business, visiting friends and relatives and miscellaneous journeys), 17 categories of spending for leisure day trips.
 - Overseas visits estimates based on results of the International Passenger Survey (IPS), published by the ONS (Office for National Statistics) as well as additional administrative sources and modelling work carried out by Visit Britain.

Additional methodology changes

SEASONALITY

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

TRIPS AND WEIGHTING FACTORS

Our model will use a set of weighting factors to reflect the fact that urban areas will attract proportionately higher numbers of day trippers due to the shopping opportunities, whereas coastal and rural areas will experience a proportionately stronger overnight visitor market, due to the availability of self-catering accommodation and the wider offer of socially distanced holidays.

INTERVENTIONS

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

EMPLOYMENT

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

2020 National forecast

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

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

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	171,000	26%	12,000	24%	183,000	26%
Self catering	37,000	6%	4,000	8%	41,000	6%
Camping	42,000	6%	1,000	2%	43,000	6%
Static caravans	111,000	17%	1,000	2%	112,000	16%
Group/campus	2,000	0%	1,000	2%	3,000	0%
Paying guest	0	0%	1,000	2%	1,000	0%
Second homes	31,000	5%	4,000	8%	35,000	5%
Boat moorings	17,000	3%	0	0%	17,000	2%
Other	61,000	9%	4,000	8%	65,000	9%
Friends & relatives	176,000	27%	24,000	47%	200,000	29%
Total	2020	648,000	51,000		699,000	
Comparison	2019	1,519,000	215,000		1,734,000	
Difference		-57%	-76%		-60%	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	326,000	15%	74,000	23%	400,000	16%
Self catering	230,000	10%	22,000	7%	252,000	10%
Camping	228,000	10%	8,000	2%	236,000	9%
Static caravans	368,000	17%	2,000	1%	370,000	15%
Group/campus	56,000	3%	6,000	2%	62,000	2%
Paying guest	0	0%	14,000	4%	14,000	1%
Second homes	182,000	8%	24,000	7%	206,000	8%
Boat moorings	59,000	3%	0	0%	59,000	2%
Other	146,000	7%	16,000	5%	162,000	6%
Friends & relatives	617,000	28%	161,000	49%	778,000	31%
Total	2020	2,211,000	327,000		2,538,000	
Comparison	2019	5,277,000	1,432,000		6,709,000	
Difference		-58%	-77%		-62%	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£41,676,000	33%	£3,277,000	23%	£44,953,000	32%
Self catering	£11,931,000	9%	£1,351,000	9%	£13,282,000	9%
Camping	£6,989,000	5%	£191,000	1%	£7,180,000	5%
Static caravans	£24,312,000	19%	£70,000	0%	£24,382,000	17%
Group/campus	£250,000	0%	£824,000	6%	£1,074,000	1%
Paying guest	£0	0%	£675,000	5%	£675,000	0%
Second homes	£3,092,000	2%	£859,000	6%	£3,951,000	3%
Boat moorings	£2,499,000	2%	£0	0%	£2,499,000	2%
Other	£24,121,000	19%	£161,000	1%	£24,282,000	17%
Friends & relatives	£12,407,000	10%	£6,877,000	48%	£19,284,000	14%
Total	2020	£127,277,000	£14,285,000		£141,562,000	
Comparison	2019	£310,818,000	£66,116,000		£376,934,000	
Difference		-59%	-78%		-62%	

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	476,000	73%	19,000	37%	495,000	71%
Business	25,000	4%	4,000	8%	29,000	4%
Friends & relatives	131,000	20%	24,000	47%	155,000	22%
Other	16,000	2%	2,000	4%	18,000	3%
Study	0	0%	2,000	4%	2,000	0%
Total	2020	648,000	51,000		699,000	
Comparison	2019	1,519,000	215,000		1,734,000	
Difference		-57%	-76%		-60%	

Nights by Purpose

	UK		Overseas		Total	
Holiday	1,809,000	82%	103,000	31%	1,912,000	75%
Business	44,000	2%	10,000	3%	54,000	2%
Friends & relatives	327,000	15%	175,000	54%	502,000	20%
Other	30,000	1%	21,000	6%	51,000	2%
Study	0	0%	18,000	6%	18,000	1%
Total	2020	2,211,000	327,000		2,538,000	
Comparison	2019	5,277,000	1,432,000		6,709,000	
Difference		-58%	-77%		-62%	

Spend by Purpose

	UK		Overseas		Total	
Holiday	£103,050,000	81%	£5,713,000	40%	£108,763,000	77%
Business	£6,054,000	5%	£681,000	5%	£6,735,000	5%
Friends & relatives	£16,637,000	13%	£6,425,000	45%	£23,062,000	16%
Other	£1,535,000	1%	£1,072,000	8%	£2,607,000	2%
Study	£0	0%	£393,000	3%	£393,000	0%
Total	2020	£127,277,000	£14,285,000		£141,562,000	
Comparison	2019	£310,818,000	£66,116,000		£376,934,000	
Difference		-59%	-78%		-62%	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

	Trips		Spend	
Urban visits	8,584,000		£270,109,000	
Countryside visits	4,383,000		£118,676,000	
Coastal visits	1,847,213		£50,013,288	
Total	2020	14,814,213	£438,798,288	
Comparison	2019	34,776,922	£1,131,729,229	
Difference		-57%	-61%	

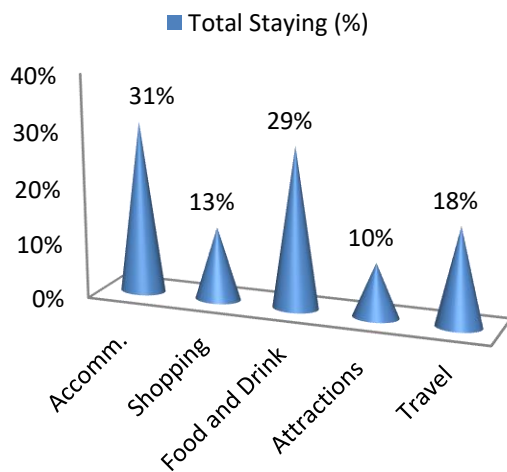
Value of Tourism

Expenditure Associated with Trips:

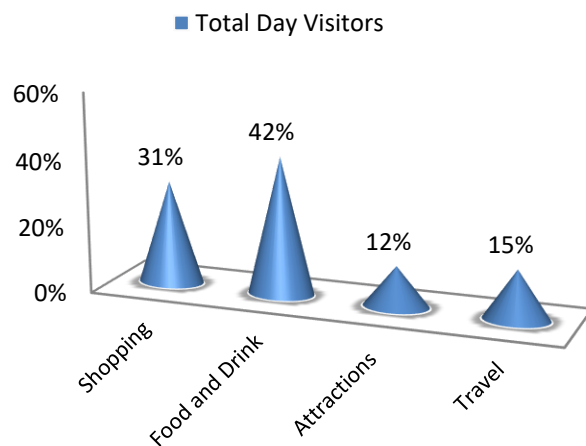
Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£39,970,000	£14,391,000	£37,424,000	£12,122,000	£23,369,000	£127,276,000
Overseas tourists		£3,696,000	£4,217,000	£3,353,000	£1,575,000	£1,443,000	£14,284,000
Total Staying		£43,666,000	£18,608,000	£40,777,000	£13,697,000	£24,812,000	£141,560,000
Total Staying (%)		31%	13%	29%	10%	18%	100%
Total Day Visitors		£0	£136,780,000	£182,301,000	£53,967,000	£65,750,000	£438,798,000
Total Day Visitors		0%	31%	42%	12%	15%	100%
Total 2020		£43,666,000	£155,388,000	£223,078,000	£67,664,000	£90,562,000	£580,358,000
%		8%	27%	38%	12%	16%	100%
Comparison 2019		£121,301,000	£396,752,000	£575,704,000	£175,054,000	£239,850,000	£1,508,661,000
Difference		-64%	-61%	-61%	-61%	-62%	-62%

Breakdown of expenditure



Breakdown of expenditure



Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	Boats	Static vans	Friends & relatives	Total
£12,384,000	£2,567,928	£8,764,275	£30,224,000	£53,940,203

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		£44,482,000	£3,646,000	£48,128,000
Retail		£18,423,000	£135,412,000	£153,835,000
Catering		£39,554,000	£176,832,000	£216,386,000
Attractions		£14,291,000	£57,158,000	£71,449,000
Transport		£14,887,000	£39,450,000	£54,337,000
Non-trip spend		£53,940,203	£0	£53,940,203
Total Direct	2020	£185,577,203	£412,498,000	£598,075,203
Comparison	2019	£453,392,750	£1,061,867,000	£1,515,259,750
Difference		-59%	-61%	-61%

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

Supplier and Income Induced Turnover

		Staying Visitor	Day Visitors	Total
Indirect spend		£43,165,000	£100,288,000	£143,453,000
Non trip spending		£10,788,000	£0	£10,788,000
Income induced		£43,041,000	£90,279,000	£133,320,000
Total	2020	£96,994,000	£190,567,000	£287,561,000
Comparison	2019	£214,638,000	£413,900,000	£628,538,000
Difference		-55%	-54%	-54%

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		£185,577,203	£412,498,000	£598,075,203
Indirect		£96,994,000	£190,567,000	£287,561,000
Total Value	2020	£282,571,203	£603,065,000	£885,636,203
Comparison	2019	£668,030,750	£1,475,767,000	£2,143,797,750
Difference		-58%	-59%	-59%

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	1,322	31%	108	1%	1,430	11%
Retailing	264	6%	1,943	21%	2,207	16%
Catering	1,137	26%	5,083	55%	6,220	46%
Entertainment	432	10%	1,729	19%	2,161	16%
Transport	161	4%	426	5%	586	4%
Non-trip spend	999	23%	0	0%	999	7%
Total FTE	2020	4,315	9,288		13,603	
Comparison	2019	7,178	14,385		21,563	
Difference		-40%	-35%		-37%	
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Accommodation	1,956	32%	160	1%	2,116	11%
Retailing	396	7%	2,914	21%	3,311	17%
Catering	1,705	28%	7,624	56%	9,329	47%
Entertainment	610	10%	2,438	18%	3,047	15%
Transport	226	4%	600	4%	827	4%
Non-trip spend	1,139	19%	0	0%	1,139	6%
Total Actual	2020	6,032	13,736		19,769	
Comparison	2019	9,960	21,269		31,229	
Difference		-39%	-35%		-37%	

Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	999	1,857	2,856
Induced jobs	797	1,672	2,469
Total FTE	2020	1,796	3,529
Comparison	2019	3,975	7,665
Difference		-55%	-54%

Estimated actual jobs			
	Staying Visitor	Day Visitors	Total
Indirect jobs	1,139	2,117	3,256
Induced jobs	909	1,906	2,815
Total Actual	2020	2,048	4,023
Comparison	2019	4,531	8,738
Difference		-55%	-54%

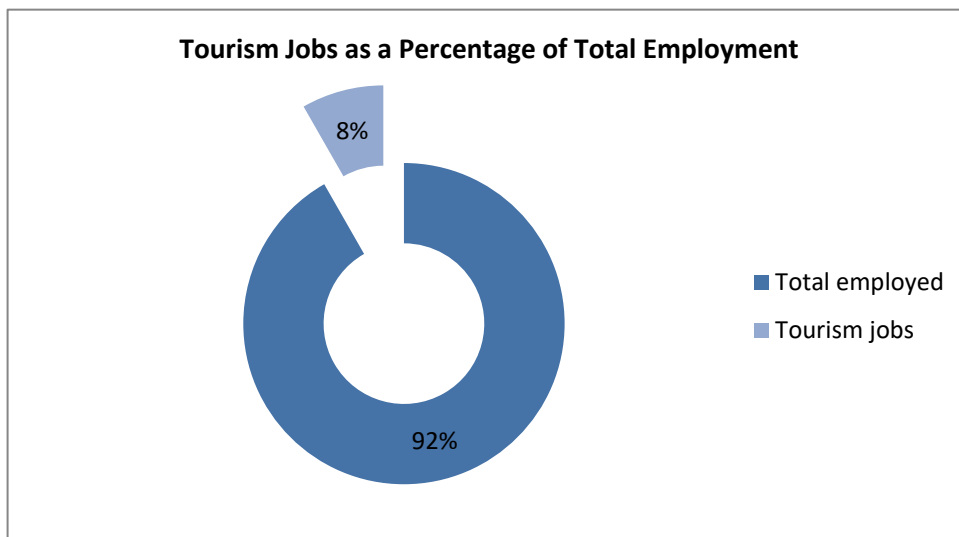
Total Jobs

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	4,315	71%	9,288	72%	13,603	72%
Indirect	999	16%	1,857	14%	2,856	15%
Induced	797	13%	1,672	13%	2,469	13%
Total FTE	2020	6,111		12,817		18,928
Comparison	2019	11,153		22,050		33,203
Difference		-45%		-42%		-43%
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Direct	6,032	75%	13,736	77%	19,769	77%
Indirect	1,139	14%	2,117	12%	3,256	13%
Induced	909	11%	1,906	11%	2,815	11%
Total Actual	2020	8,080		17,760		25,840
Comparison	2019	14,491		30,006		44,498
Difference		-44%		-41%		-42%

Tourism Jobs as a Percentage of Total Employment

	Staying Visitor	Day visitors	Total
Total employed	312,700	312,700	312,700
Tourism jobs	8,080	17,760	25,840
Proportion all jobs	3%	6%	8%
Comparison	2019	14,491	30,006
Difference	-44%	-41%	-42%



Appendix I - Introduction about Cambridge Model

This report examines the volume and value of tourism and the impact of that expenditure on the local economy. The figures were derived using the Cambridge Economic Impact Model and the research was undertaken by Destination Research.

The model utilises information from national tourism surveys and regionally based data held by Destination Research. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level.

Limitations of the Model

The methodology and accuracy of the above sources vary. The results of the model should therefore be regarded as estimates which are indicative of the scale and importance of visitor activity in the local area. It is important to note that in the national tourism surveys the sample sizes for each area changes year on year. This is as a result of the random probability nature of the methodology. As such, the results of the Cambridge Model are best viewed as a snapshot in time and we would caution against year-on-year comparisons.

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

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

Rounding

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

Data sources

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

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

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

- Records of known local accommodation stock held by Destination Research;
- VisitEngland's surveys of Visits to Attractions, which provide data on the number of visitors to individual tourist attractions ;
- Mid- 2018 estimates of resident population as based on the 2011 Census of Population;
- Selected data from the 2011 Census of Employment;
- Selected data on the countryside and coast including, national designations and length of the coastline.

Staying Visitors

The GBTS provides information on the total number of trips to the region and the relative proportions using different types of accommodation. By matching these figures to the supply of such accommodation, the regional average number of trips per bedspace or unit of accommodation can be derived. The IPS provides information on the total number of trips by overseas visitors to the region. The model uses three year rolling averages to reduce extreme highs and lows which are due to small sample sizes, rather than being a reflection on drastic changes in demand year-on-year.

Day Visitors

Information on day trips at the regional level is available from the Day Visits in Great Britain survey. The survey includes all leisure-related trips from home. It should be noted that a large proportion are local trips made by people resident in the locality. The model uses information from the survey to estimate the number of longer day trips (defined as those lasting at least 3 hours and involving travel of more than 20 miles) and irregular trips lasting more than 3 hours.

Impact of tourism expenditure

This section examines the impact of the tourism expenditure in terms of the direct, indirect and induced expenditure as well as an estimate of the actual jobs (both direct and indirect) supported by tourism expenditure in the district.

The GBTS, IPS and Day Visits to Great Britain survey data on the breakdown of visitor spending. The impact of this initial round of expenditure will be subsequently increased by multiplier effects. These arise from the purchase of supplies and services by the businesses in receipt of visitor expenditure (indirect impacts), and by the income induced-effects arising from the spending of wages by employees in the first round of business and in subsequent expenditure in supplier business (induced impacts).

The New Earnings Survey which provides information on wage levels by industry sector and region; An internal business database which includes data on the structure of business expenditure, local linkages and multiplier ratios drawn from a wide range of business and economic studies carried out by Geoff Broom Associates, PA Cambridge Economic Consultants and others. By applying the breakdown to the estimates of visitor spending, the model generates estimates of total direct spending.

Evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover – for example, some expenditure on food and drink actually takes place in inns and hotels that fall in the accommodation sector and within attractions. More significantly, expenditure on travel costs associated with individual trips is equally likely to take place at the origin of the trip as the destination. Therefore the model assumes that only 40% of travel expenditure accrues to the destination area.

Number of full time job equivalents

Having identified the value of turnover generated by visitor spending, it is possible to estimate the employment associated with that spending. Wages for staff and drawings for the proprietors will absorb a proportion of that turnover. By applying these proportions to the overall additional turnover in each sector, the amount of money absorbed by employment costs can be calculated. The New Earnings Survey provides data from which the average costs by business sector, adjusted to take account of regional differences, can be calculated.

After allowing for additional costs such as National Insurance and pension costs, an average employment cost per full time equivalent job can be estimated. The number of such jobs in the local area can then be estimated by dividing the amount of business expenditure on wages and drawings by the average employment cost per job.

Number of Actual Jobs

The model generates estimates of full time equivalent jobs based on visitor spending. However, the total number of actual jobs will be higher when part time and seasonal working is taken into account. The full time equivalent jobs arising directly from visitor spending are converted into actual jobs using information from business surveys in the sectors receiving visitor spending (principally accommodation, food and drink, retail, attractions, transport). In general, the conversion factor between full time equivalent jobs and actual jobs varies around 1.5 in those sectors.

The indirect and induced jobs arise across a much wider range of employment sectors. Therefore, the average 1.16 for all sectors based on Census of Employment data has been used to convert full time equivalent jobs in this sector to actual jobs.

The employment estimates generated by the model include both self-employed and employed people supported by visitor expenditure. The model also includes an estimate of the additional jobs arising in the attractions sector, which are not related to visitor expenditure. However, the numbers do not include other tourism-related employment such as jobs in local authorities arising from their tourism functions, e.g. tourist information staff, additional public health, parks and gardens, public conveniences, maintenance sections and jobs arising from capital investment in tourism facilities.

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