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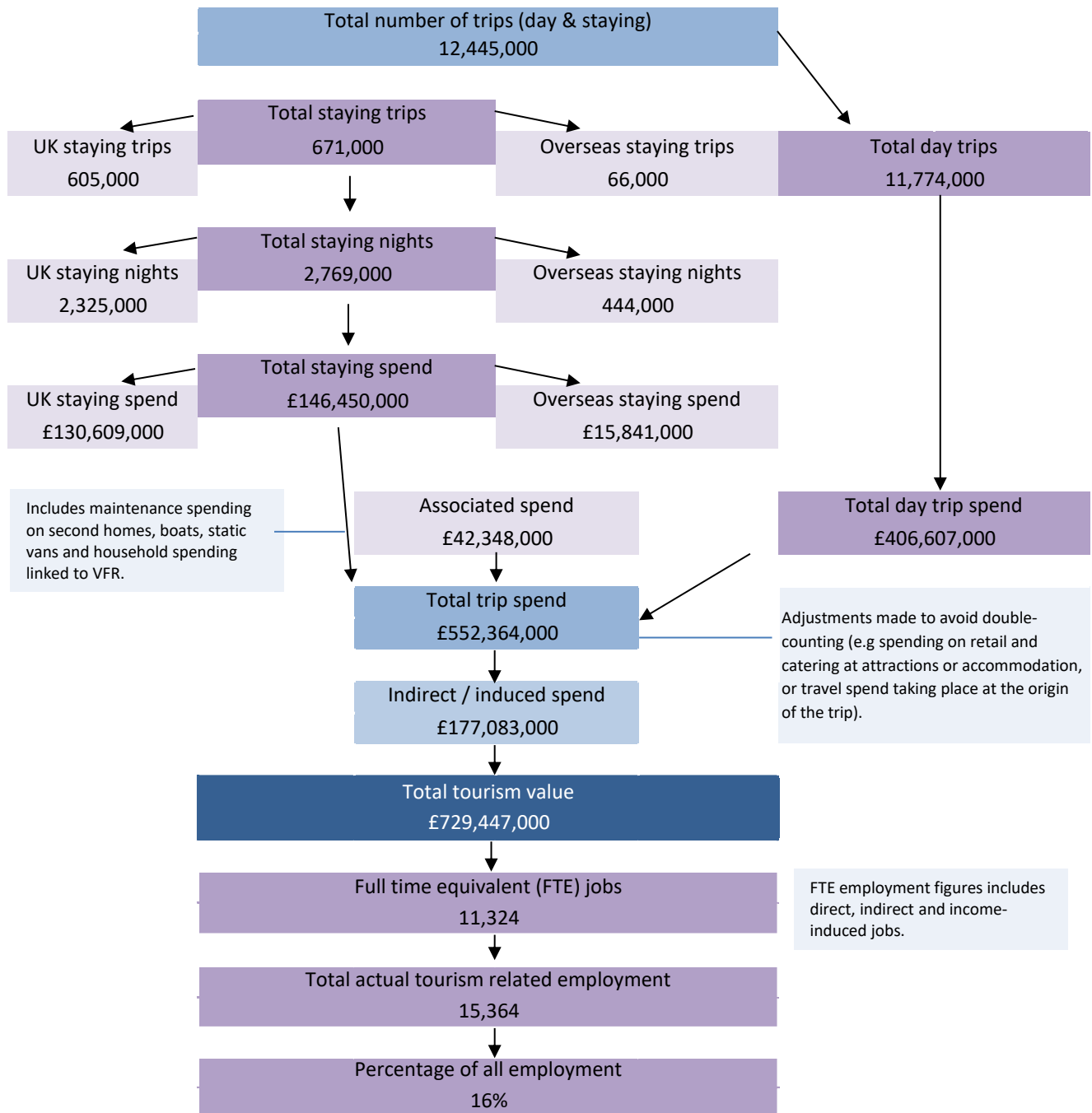
Produced by:

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Economic Impact of Tourism  
East Suffolk - 2024

## Economic impact of tourism – Headline figures

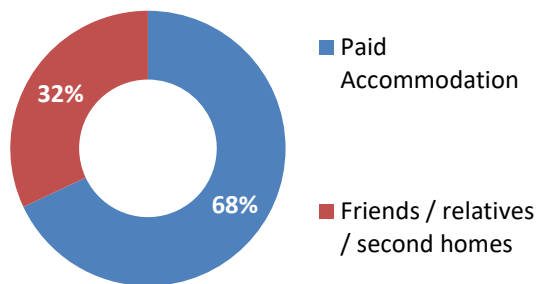
## East Suffolk - 2024



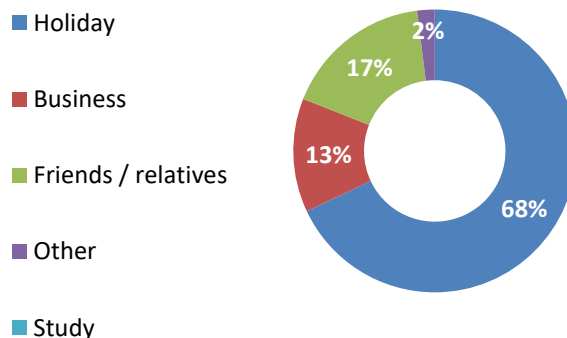
### Economic impact of tourism – Year on year comparisons

<u>Day Trips</u>	2023	2024	Annual variation
Day trips volume	12,053,000	11,774,000	-2%
Day trips value	£385,826,000	£406,607,000	5%
<u>Overnight trips</u>			
Number of trips	688,000	671,000	-2%
Number of nights	2,594,000	2,769,000	7%
Trip value	£142,161,000	£146,450,000	3%
<b>Total value</b>	<b>£692,793,000</b>	<b>£729,447,000</b>	<b>5%</b>
<b>Actual jobs</b>	<b>14,588</b>	<b>15,364</b>	<b>5%</b>

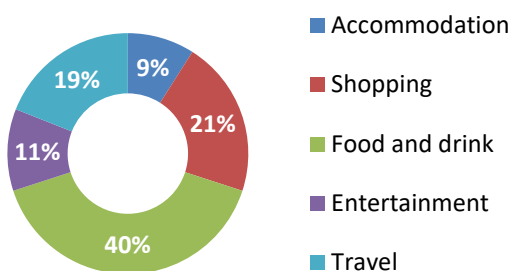
### Type of accommodation



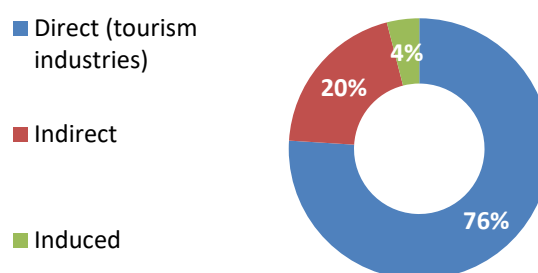
### Trips by purpose



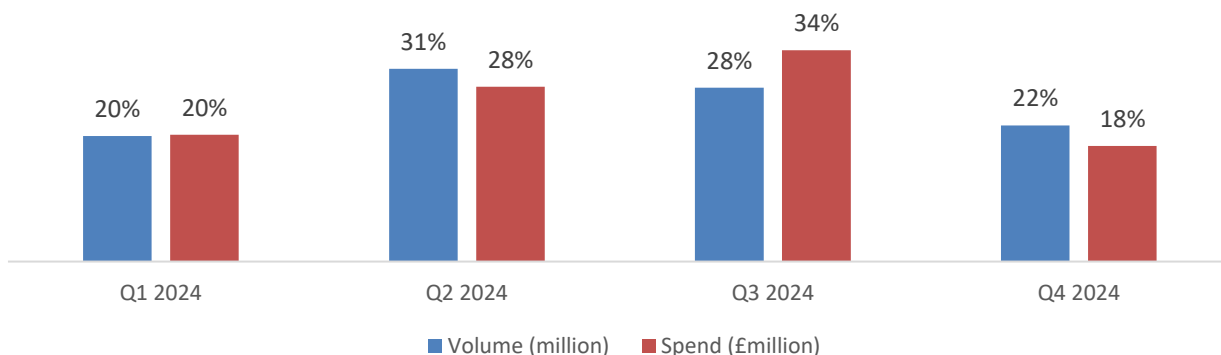
### Breakdown of expenditure



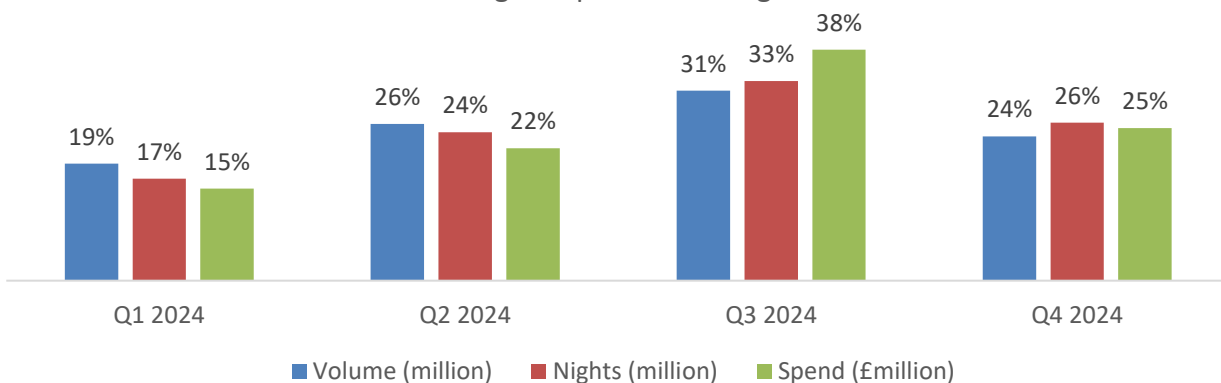
### Type of employment



### Tourism Day Trips - East of England



### Overnight Trips - East of England



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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 2024 and provides comparative data against the previously published data. The results are derived using the Cambridge Economic Impact Model under licence by Destination Research Ltd based on the latest data from national tourism surveys and regionally/locally based data.

The Cambridge Model is a tool that is constantly changing and adapting. In recent years, both domestic and international tourism surveys used in the model have seen major updates in their methods and data collection techniques, leading to notable changes in their findings. In addition, the results have been further influenced by changes in travel behaviour due to factors like COVID-19, the cost-of-living crisis and rising energy costs. It is difficult to establish whether changes in reported travel and spending are simply a reflection of new travel patterns or are they mainly a result of the updated methodologies.

For this reason, we have implemented a hybrid data approach that involves a two-stage evaluation process. The first stage uses the Cambridge Model to break down regional tourism data into sub-regional areas using a top-down approach. This is then combined with bottom-up initiatives that include data from third-party sources and business performance data collected at the destination level by us and our partners. We have also employed time series analysis on previously published data, using concepts derived from State Space Models (SSM). The projected figures generated through this analysis, as presented in the Cambridge Model reports, aim to serve as a proxy for the potential outcomes that might have occurred in the absence of methodological changes.

This evolving methodology has been pivotal in our ability to produce a dynamic and reliable picture of tourism trends throughout the pandemic year, the cost-of-living crisis, and periods of fluctuations in inflation. 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 five years are:

- Attractions data - ALVA (Association of Leading Visitor Attractions)
- VisitEngland Domestic Sentiment Tracker
- 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).

## **Contextual analysis - Recent issues affecting tourism**

### **Inflation**

The UK's annual Consumer Price Index (CPI) inflation rate for 2023 averaged 7.3%. This follows a peak of 9.1% in 2022. The average inflation rate for 2024 was around 2.9%.

### **Energy prices**

Global prices for gas, electricity, and oil began rising in summer 2021 as economies reopened following pandemic-related lockdowns. This underlying increase was amplified by reduced fuel supplies from some producers and growing tensions between Russia and Ukraine.

The first major impact on domestic customers in Great Britain came in April 2022, when the energy price cap rose by 54%. The Government's Energy Price Guarantee then set a maximum unit price for consumers. However, the average annual bill for typical gas and electricity use remains significantly higher than in winter 2021/22.

### **Cost-of-Living**

While the sentiment related to the cost-of-living crisis improved throughout 2024, vs 2022, there were still 70 to 80% of consumers who either believed that worst was still to come (30% to 35%) or that things will stay the same (40% to 45%). However, sentiment shifted throughout the year, with the last three months of 2024 being the most negative.

### **Value of the pound**

Over the past five years or so, the pound has been relatively weak, especially against the dollar, and to a lesser extent against the euro. A weaker pound means that it is generally cheaper for overseas residents to visit the UK, which makes the UK relatively more attractive. It also makes staying in the UK relatively more attractive to UK tourists compared to travelling abroad.

### **Staffing issues**

Staff vacancies have been affected by employment costs associated with changes to minimum wage and employment National Insurance contributions.

### **Electronic travel authorisation (ETA) and EU visitor passport requirements.**

The UK's roll out of the £10 electronic travel authorisation (ETA) began in October 2023, first for all non-visa nationals and then required for visitors from European countries too. It has been assumed that ETAs will have a very low impact for long-haul markets, as it is a very small proportion of total trip spend and a low impact for Europe, as the proportion of trip spend would be larger.

### **Tax-free shopping**

While the UK was part of the EU, it had a tax-free shopping scheme allowing non-EU visitors to claim back VAT on goods purchased in the UK and taken home. This scheme ended in Great Britain after the Brexit transition on 31 December 2020. The end of the scheme led to higher tax revenues, even though foreign tourist spending has declined and is expected to keep falling.

## **Domestic and overseas trips: 2024 results**

### **Domestic overnights visits**

There were 105.6 million domestic overnight trips in Great Britain in 2024. Domestic spend on overnight trips reached 32.9 billion, and the average spend per trip in Great Britain rose from £266 in 2023, to £312 in 2024.

- Domestic overnight trips volume decreased by 10% vs 2023 and by 14% vs 2022.
- Spend on overnight trips in England in 2024 was 5% above 2023 and 3% above 2022.
- Large towns and cities continued to be the most popular destinations in England in 2024 and further increased in popularity in 2024, from 44% share in 2022, 45% in 2023 to 46% in 2024.
- The number of trips with a stay in a 'caravan / camping / glamping' reduced vs 2023 and 2022.
- In 2024, regions with the largest share of overnight trips in England were South West (17%), London (17%), North West (16%) and South East (16%).

### **Domestic day visits**

There were 1.03 billion domestic tourism day visits in Britain in 2024. Spend on day visits in Great Britain reached £54.8bn, and the average spend per day visit in Great Britain rose from £44 in 2023, to £53 in 2024.

- The domestic tourism day visits volume decreased in 2024 by 12% vs 2023 after an 8% year-on-year increase in 2023.
- Spend on tourism day visits in England in 2024 rose by 6% in 2024 to £48.4 billion, following a 15% year-on-year increase in 2023.
- Visits to the seaside increased in 2024, especially during the first quarter of the year.
- In 2024, London was still the most popular day visit destination in England (21% of visits and 25% of spend), followed by the South East and North West.

### **Visits to visitor attractions**

Overall, attractions in England reported an 1.4% annual increase in visits from 2023 to 2024, with a 7% increase in 2024 adult admission fees (higher than the rate of inflation) and an 8% increase in gross revenue.

### **Overseas visits**

VisitBritain's estimate for the full year 2024 is 41.2 million inbound visits to the UK with £31.5 billion spent. This would represent growth of 9% in visits on 2023, and would be 1% up on 2019. Spend would be 1% up on 2023 (though 1% down in real terms) and 11% up in nominal terms on 2019.

- Visits to Friends or Relatives (VFR) lead the recovery, with trips and spend surpassing pre-COVID levels.
- Holiday visits have almost reached pre-COVID levels and are growing, although spend is down in real terms.
- Business visits are lagging well behind (both short and long haul) though up on 2023
- The fast recovery of VFR trips has pushed down average spend per visit.

Volume of tourism

East Suffolk - 2024



## Staying visitors - Accommodation type

### Trips by accommodation

	UK		Overseas		Total	
Serviced	174,000	29%	12,000	18%	186,000	28%
Self catering	37,000	6%	6,000	9%	43,000	6%
Camping	57,000	10%	3,000	5%	60,000	9%
Static caravans	74,000	12%	1,000	1%	75,000	11%
Group/campus	1,000	0%	1,000	1%	2,000	1%
Paying guest	0	0%	0	0%	0	0%
Second homes	24,000	4%	4,000	6%	28,000	4%
Boat moorings	26,000	4%	0	0%	26,000	4%
Other	55,000	9%	5,000	8%	60,000	9%
Friends & relatives	157,000	26%	34,000	52%	191,000	28%
<b>Total 2024</b>	<b>605,000</b>		<b>66,000</b>		<b>671,000</b>	
<b>Comparison 2023</b>	<b>624,000</b>		<b>64,000</b>		<b>688,000</b>	
<b>Difference</b>	<b>-3%</b>		<b>3%</b>		<b>-2%</b>	

### Nights by accommodation

	UK		Overseas		Total	
Serviced	364,000	16%	81,000	18%	445,000	16%
Self catering	286,000	12%	37,000	8%	323,000	12%
Camping	306,000	13%	18,000	4%	324,000	12%
Static caravans	246,000	11%	2,000	1%	248,000	9%
Group/campus	10,000	0%	5,000	1%	15,000	1%
Paying guest	0	0%	5,000	1%	5,000	0%
Second homes	205,000	9%	32,000	7%	237,000	9%
Boat moorings	91,000	4%	0	0%	91,000	3%
Other	131,000	6%	24,000	6%	155,000	5%
Friends & relatives	686,000	29%	240,000	54%	926,000	33%
<b>Total 2024</b>	<b>2,325,000</b>		<b>444,000</b>		<b>2,769,000</b>	
<b>Comparison 2023</b>	<b>2,189,000</b>		<b>405,000</b>		<b>2,594,000</b>	
<b>Difference</b>	<b>6%</b>		<b>10%</b>		<b>7%</b>	

### Spend by accommodation type

	UK		Overseas		Total	
Serviced	£44,160,000	34%	£2,987,000	19%	£47,147,000	32%
Self catering	£12,592,000	10%	£2,000,000	13%	£14,592,000	10%
Camping	£9,750,000	7%	£366,000	2%	£10,116,000	7%
Static caravans	£16,829,000	13%	£69,000	0%	£16,898,000	12%
Group/campus	£136,000	0%	£570,000	4%	£706,000	1%
Paying guest	£0	0%	£175,000	1%	£175,000	0%
Second homes	£2,572,000	2%	£953,000	6%	£3,525,000	2%
Boat moorings	£3,989,000	3%	£0	0%	£3,989,000	3%
Other	£22,432,000	17%	£209,000	1%	£22,641,000	15%
Friends & relatives	£18,149,000	14%	£8,512,000	54%	£26,661,000	18%
<b>Total 2024</b>	<b>£130,609,000</b>		<b>£15,841,000</b>		<b>£146,450,000</b>	
<b>Comparison 2023</b>	<b>£126,646,000</b>		<b>£15,515,000</b>		<b>£142,161,000</b>	
<b>Difference</b>	<b>3%</b>		<b>2%</b>		<b>3%</b>	

Serviced accommodation includes hotels, guesthouses, inns, B&B and farms. Paying guest refers to overseas visitors staying in private houses (e.g. 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	441,000	73%	18,000	27%	459,000	68%
Business	73,000	12%	11,000	17%	84,000	13%
Friends & relatives	79,000	13%	34,000	51%	113,000	17%
Other	12,000	2%	3,000	5%	15,000	2%
Study	0	0%	0	0%	0	0%
<b>Total</b> <b>2024</b>	<b>605,000</b>		<b>66,000</b>		<b>671,000</b>	
<b>Comparison</b> <b>2023</b>	<b>624,000</b>		<b>64,000</b>		<b>688,000</b>	
<b>Difference</b>	<b>-3%</b>		<b>3%</b>		<b>-2%</b>	

### Nights by purpose

	UK		Overseas		Total	
Holiday	1,929,000	83%	102,000	23%	2,031,000	73%
Business	140,000	6%	36,000	8%	176,000	7%
Friends & relatives	233,000	10%	271,000	61%	504,000	18%
Other	23,000	1%	31,000	7%	54,000	2%
Study	0	0%	4,000	1%	4,000	0%
<b>Total</b> <b>2024</b>	<b>2,325,000</b>		<b>444,000</b>		<b>2,769,000</b>	
<b>Comparison</b> <b>2023</b>	<b>2,189,000</b>		<b>405,000</b>		<b>2,594,000</b>	
<b>Difference</b>	<b>6%</b>		<b>10%</b>		<b>7%</b>	

### Spend by purpose

	UK		Overseas		Total	
Holiday	£100,569,000	77%	£4,752,000	30%	£105,321,000	72%
Business	£18,285,000	14%	£1,743,000	11%	£20,028,000	14%
Friends & relatives	£10,449,000	8%	£7,921,000	50%	£18,370,000	12%
Other	£1,306,000	1%	£1,267,000	8%	£2,573,000	2%
Study	£0	0%	£158,000	1%	£158,000	0%
<b>Total</b> <b>2024</b>	<b>£130,609,000</b>		<b>£15,841,000</b>		<b>£146,450,000</b>	
<b>Comparison</b> <b>2023</b>	<b>£126,646,000</b>		<b>£15,515,000</b>		<b>£142,161,000</b>	
<b>Difference</b>	<b>3%</b>		<b>2%</b>		<b>3%</b>	

## Day visitors

### Total volume and value of day trips

	Trips		Spend	
Urban visits	3,898,000		£148,487,000	
Countryside visits	3,180,000		£104,211,000	
Coastal visits	4,696,000		£153,909,000	
<b>Total</b> <b>2024</b>	<b>11,774,000</b>		<b>£406,607,000</b>	
<b>Comparison</b> <b>2023</b>	<b>12,053,000</b>		<b>£385,826,000</b>	
<b>Difference</b>	<b>-2%</b>		<b>5%</b>	

Value of tourism

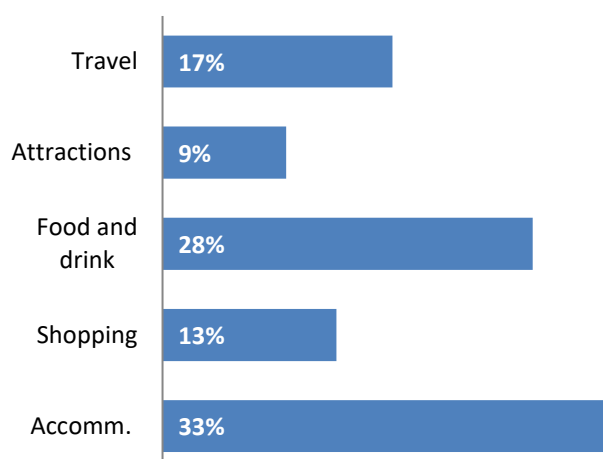
East Suffolk - 2024

### Expenditure associated with trips:

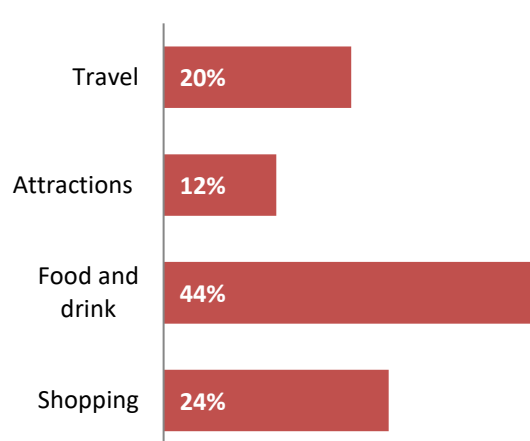
#### Direct expenditure associated with trips

	Accomm.	Shopping	Food and drink	Attractions	Travel	Total
UK visitors	£44,407,100	£14,367,000	£36,570,500	£11,754,800	£23,509,600	£130,609,000
Overseas visitors	£4,118,700	£4,593,900	£3,801,800	£1,742,500	£1,584,100	£15,841,000
<b>Total staying</b>	<b>£48,525,800</b>	<b>£18,960,900</b>	<b>£40,372,300</b>	<b>£13,497,300</b>	<b>£25,093,700</b>	<b>£146,450,000</b>
<b>Total staying (%)</b>	<b>33%</b>	<b>13%</b>	<b>28%</b>	<b>9%</b>	<b>17%</b>	<b>100%</b>
<b>Total day visitors</b>	<b>£0</b>	<b>£97,585,700</b>	<b>£178,907,100</b>	<b>£48,792,800</b>	<b>£81,321,400</b>	<b>£406,607,000</b>
<b>Total day visitors (%)</b>	<b>0%</b>	<b>24%</b>	<b>44%</b>	<b>12%</b>	<b>20%</b>	<b>100%</b>
<b>Total 2024</b>	<b>£48,525,800</b>	<b>£116,546,600</b>	<b>£219,279,400</b>	<b>£62,290,100</b>	<b>£106,415,100</b>	<b>£553,057,000</b>
<b>%</b>	<b>9%</b>	<b>21%</b>	<b>40%</b>	<b>11%</b>	<b>19%</b>	<b>100%</b>
<b>Comparison 2023</b>	<b>£46,013,000</b>	<b>£111,261,000</b>	<b>£210,025,000</b>	<b>£59,962,000</b>	<b>£100,724,000</b>	<b>£527,985,000</b>
<b>Difference</b>	<b>5%</b>	<b>5%</b>	<b>4%</b>	<b>4%</b>	<b>6%</b>	<b>5%</b>

**Breakdown of expenditure  
Staying visitors**



**Breakdown of expenditure  
Day visitors**



### Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	Boats	Static vans	Friends & relatives	Total
£9,881,000	£3,949,000	£6,731,000	£21,787,000	£42,348,000

Spend on second homes is assumed to be an average of £2,200 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,500 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 £2,500. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £225 per visit has been assumed based on national research for social and personal visits.

### 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.

		Overnight trips	Day trips	Total trips
Accommodation		£48,914,000	£3,592,000	£52,506,000
Retail		£18,483,000	£94,672,000	£113,155,000
Catering		£39,778,000	£174,209,000	£213,987,000
Attractions		£13,532,000	£52,271,000	£65,803,000
Transport		£15,447,000	£49,118,000	£64,565,000
Non-trip spend		£42,348,000	£0	£42,348,000
<b>Total Direct</b>	<b>2024</b>	<b>£178,502,000</b>	<b>£373,862,000</b>	<b>£552,364,000</b>
<b>Comparison</b>	<b>2023</b>	<b>£169,159,000</b>	<b>£355,343,000</b>	<b>£524,502,000</b>
<b>Difference</b>		<b>6%</b>	<b>5%</b>	<b>5%</b>

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

		Overnight trips	Day trips	Total trips
Indirect spend		£44,921,000	£91,266,000	£136,187,000
Non trip spending		£8,470,000	£0	£8,470,000
Income induced		£20,738,000	£11,688,000	£32,426,000
<b>Total</b>	<b>2024</b>	<b>£74,129,000</b>	<b>£102,954,000</b>	<b>£177,083,000</b>
<b>Comparison</b>	<b>2023</b>	<b>£70,591,000</b>	<b>£97,700,000</b>	<b>£168,291,000</b>
<b>Difference</b>		<b>5%</b>	<b>5%</b>	<b>5%</b>

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

		Overnight trips	Day trips	Total trips
Direct		£178,502,000	£373,862,000	£552,364,000
Indirect		£74,129,000	£102,954,000	£177,083,000
<b>Total Value</b>	<b>2024</b>	<b>£252,631,000</b>	<b>£476,816,000</b>	<b>£729,447,000</b>
<b>Comparison</b>	<b>2023</b>	<b>£239,750,000</b>	<b>£453,043,000</b>	<b>£692,793,000</b>
<b>Difference</b>		<b>5%</b>	<b>5%</b>	<b>5%</b>

## Employment

East Suffolk - 2024

## 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.

### Direct employment

Full time equivalent (FTE)				
	Overnight trips	Day trips	Total trips	
Accommodation	867	64	931	12%
Retailing	168	862	1,030	13%
Catering	686	3,004	3,690	46%
Entertainment	240	928	1,168	14%
Transport	106	336	442	5%
Non-trip spend	784	0	784	10%
<b>Total FTE</b>	<b>2024</b>	<b>2,851</b>	<b>5,194</b>	<b>8,045</b>
<b>Comparison</b>	<b>2023</b>	<b>2,694</b>	<b>4,930</b>	<b>7,624</b>
<b>Difference</b>		<b>6%</b>	<b>5%</b>	<b>6%</b>

Estimated actual jobs				
	Overnight trips	Day trips	Total trips	
Accommodation	1,283	94	1,377	12%
Retailing	253	1,294	1,547	13%
Catering	1,029	4,507	5,536	48%
Entertainment	339	1,309	1,648	14%
Transport	149	474	623	5%
Non-trip spend	894	0	894	8%
<b>Total Actual</b>	<b>2024</b>	<b>3,947</b>	<b>7,678</b>	<b>11,625</b>
<b>Comparison</b>	<b>2023</b>	<b>3,748</b>	<b>7,287</b>	<b>11,035</b>
<b>Difference</b>		<b>5%</b>	<b>5%</b>	<b>5%</b>

### Indirect & induced employment

Full time equivalent (FTE)			
	Overnight trips	Day trips	Total trips
Indirect jobs	989	1,690	2,679
Induced jobs	384	216	600
<b>Total FTE</b>	<b>2024</b>	<b>1,373</b>	<b>1,906</b>
<b>Comparison</b>	<b>2023</b>	<b>1,307</b>	<b>1,809</b>
<b>Difference</b>		<b>5%</b>	<b>5%</b>

Estimated actual jobs			
	Overnight trips	Day trips	Total trips
Indirect jobs	1,127	1,927	3,054
Induced jobs	438	247	685
<b>Total Actual</b>	<b>2024</b>	<b>1,565</b>	<b>2,174</b>
<b>Comparison</b>	<b>2023</b>	<b>1,490</b>	<b>2,063</b>
<b>Difference</b>		<b>5%</b>	<b>5%</b>

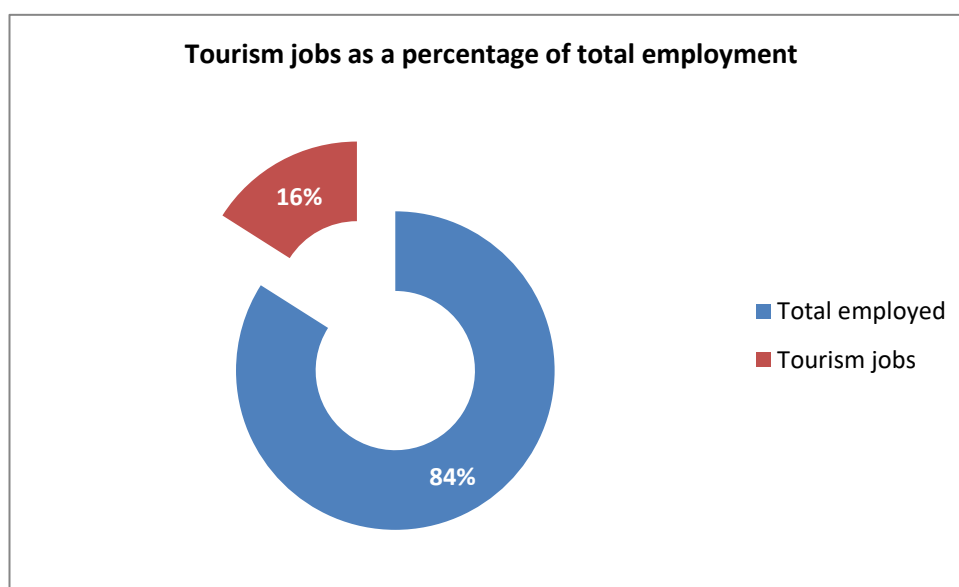
## Total jobs

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)						
	Overnight trips		Day trips		Total trips	
Direct	2,851	68%	5,194	73%	8,045	71%
Indirect	989	23%	1,690	24%	2,679	22%
Induced	384	9%	216	3%	600	5%
<b>Total FTE</b>	<b>2024</b>	<b>4,224</b>	<b>7,100</b>		<b>11,324</b>	
Comparison	<b>2023</b>	<b>4,001</b>	<b>6,740</b>		<b>10,741</b>	
Difference		6%	5%		5%	
Estimated actual jobs						
	Overnight trips		Day trips		Total trips	
Direct	3,947	72%	7,678	78%	11,625	76%
Indirect	1,127	20%	1,927	19%	3,054	20%
Induced	438	8%	247	3%	685	4%
<b>Total Actual</b>	<b>2024</b>	<b>2,014</b>	<b>9,852</b>		<b>15,364</b>	
Comparison	<b>2023</b>	<b>5,238</b>	<b>9,350</b>		<b>14,588</b>	
Difference		-62%	5%		5%	

## Tourism jobs as a percentage of total employment

	Overnight trips	Day trips	Total trips
Total employed	73,700	97,000	97,000
Tourism jobs	2,014	9,852	15,364
<b>Proportion all jobs</b>	<b>2.7%</b>	<b>10.0%</b>	<b>16.0%</b>
Comparison	<b>2023</b>	<b>5,238</b>	<b>9,350</b>
Difference		-62%	5%





**The key 2024 results of the economic impact assessment are:**

**12.4 million trips** were undertaken in the area.

**11.8 million** day trips.

**0.7 million** staying trips.

**2.8 million** nights in the area as a result of staying trips.

**£553 million** spent by tourists during their trip to the area.

**£46 million** spent on average in the local economy each month.

**£146 million** generated by staying trips.

**£407 million** generated from irregular day trips.

**£729 million** spent in the local area as result of tourism, taking into account multiplier effects.

**15,365 jobs supported**, both for local residents and for those living nearby.

**11,625 tourism jobs** directly supported.

**3,739 non-tourism related jobs** supported linked to multiplier spend from tourism.

## **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.

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