The Economic Impact of Tourism
Arun 2013

TOURISM
SOUTH EAST

CONTENTS

GLOSSARY OF TERMS

Actual Jobs
Many jobs are seasonal or part-time in their nature in the tourism sector, so an adjustment is made to calculate the actual number of jobs from the number of FTEs. The adjustment made is based on the findings of surveys of tourism related businesses, and national employment surveys.

Annual Business Inquiry (ABI)
This is the main government survey of companies in the UK. It is conducted in two parts: one dealing with employment, the other with financial information.

Annual Survey of Hours and Earnings
The AHSE Survey provides information on wage levels by industry sector and occupation. The main strength of the AHSE is its large sample size. It is based on a 1% sample of employees who are members of PAYE. The coverage of full-time adult employees is virtually complete, and consequently the survey is representative of hours worked for full-time employees on adult rates of pay (although the survey is currently not weighted). The coverage of part-time employees is not comprehensive, as some part-time workers will have earnings below the income tax threshold. The AHSE is the best source for estimating full time earnings.

Direct jobs
Jobs directly generated in those local businesses in which visitors spend money, i.e. hotels, catering establishments.

England Leisure Visit Survey (ELVS)
The leisure day visits survey was last conducted in 2005 and covered approximately 5,000 respondent interviews. Unlike the IPS and UKTS, this survey is not undertaken on an ongoing basis and thus adjustments are made in the model to account for annual increments in the value and volume based on trends observed in 2005.

Economic multiplier
Multipliers are used to estimate the economic impact of visitor expenditure. Visitor expenditure produces three effects. Direct effects are changes in the business sector directly receiving visitor expenditure. For instance, visitors staying in a hotel will directly increase revenue and the number of jobs in the hotel sector. Indirect effects are the changes in supplier businesses. For example, these indirect effects would be hotels purchasing more linen from local suppliers as a result of increased business. Induced effects are changes in local economic activity resulting from household spending. For instance, employees of the hotel and linen supplier spend their wages in the local area, resulting in more sales, income and jobs in the area.

Full Time Equivalent Jobs (FTE)
For the purposes of the Model, a FTE is defined by the average annual salary plus employment costs in the sector concerned.

Indirect jobs
Jobs created locally due to the purchases of goods and services by businesses benefiting from visitor expenditure, i.e. jobs with local suppliers.

Induced jobs
Jobs created throughout the local economy because employees employed due to visitor expenditure spend their wages locally on goods and services such as food, clothing and housing.

International Passenger Survey (IPS)
The International Passenger Survey is conducted by Office for National Statistics and is based on face-to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland. Around 210,000 interviews are undertaken each year. IPS provides headline figures, based on the county or unitary authority, for the volume and value of inbound trips to the UK.

Labour Force Survey (LFS)
The LFS is a household panel survey, continuous since 1992, with results produced each quarter. It has a sample of approximately 60,000 households. The LFS is the government's largest continuous household survey and participation in the survey is voluntary. LFS data is weighted to enable the population estimates to be produced. The weighting also attempts to compensate for differential non-response among different subgroups in the population. LFS is designed to provide information on the UK labour market that can be used to develop, manage and evaluate labour market.

'Other-trip' Expenditure
Apart from the spending associated with the individual trips, additional spending by non-visitors, e.g. friends and relatives with whom the visitor is visiting and/or staying with will also take place. Moreover, owners of second homes/boats will spend some money on maintenance, repair.

Staying trips
Staying trips comprise a visit which involves a stay away from home of at least one night. The study measures trips, rather than visitors as one visitor may make multiple trips to an area in a given period.

Tourism day trips
Day trips are defined as a visit to and from home for leisure purposes, undertaken on an irregular basis and lasting a minimum of three hours. The report excludes trips undertaken for business or study purposes, as these are not covered by the Leisure Day Visits Survey methodology. The definition of day trips adopted by this study is that used by the Department of Culture, Media and Sport.

United Kingdom Tourism Survey (UKTS)
The United Kingdom Tourism Survey is undertaken by BRMB for VisitBritain and is based on 1,000 telephone interviews per week (50,000 annually). It provides basic headline data on the volume and value of domestic tourism at a national, regional and county level.

United Kingdom Occupancy Survey (UKOS)
As part of the EU Directive on Tourism Statistics adopted in 1995, the UK must report regularly on a specified range of statistics to Eurostat, the official statistical office of the European Union. Included in these statistics are monthly occupancy rates for UK serviced accommodation. The responsibility for providing this data lies with the four National Tourist Boards, and across England the survey is undertaken by the Regional Tourist Boards. A sample of establishments is recruited to the survey and asked to complete a data form each month, giving details of their nightly occupancy. The data form is processed and analysed to produce monthly occupancy rates for the whole of the area and for specific categories of type, size, location etc.

VFR Trips
VFR trips are defined as a visit where the main purpose is visiting friends and relatives. Whilst many trips to visit friends and relatives will be accommodated in the homes of these friends/ relatives, some will make use of other forms of accommodation. It should be also noted that other forms of trip, for instance for holiday or business purposes may stay with friends and relatives rather than in commercial accommodation.

1. EXECUTIVE SUMMARY

1.1 Introduction

This report contains the findings of a study commissioned by Arun District Council and undertaken by Tourism South East. The overall aim of the research is to provide indicative estimates for the volume, value and resultant economic impact of tourism on Arun in 2013.

The research involved the application of the Cambridge Tourism Economic Impact Model or 'Cambridge Model'; a computer-based model developed by Geoff Broom Associates and the Regional Tourist Boards of England.

1.2 Volume & Value of Tourism – National and Regional results

Domestic overnight trips

Over the course of the year, 101.8 million domestic overnight trips were taken in England, a decrease of 2.6% compared with 2012. The value of domestic overnight trips fell by 4%, from £19.5 billion in 2012 to £18.7 billion in 2013.

Domestic overnight tourism (actual)				Percentage change (2013 vs 2012)		
2013	**Trips ('000)**	**Bednights ('000)**	**Expenditure (£ million)**	**Trips (%)**	**Bednights (%)**	**Expenditure (%)**
Great Britain	122,905	373,607	23,294	-2.5%	-3.8%	-2.8%
England	101,756	297,199	18,710	-2.6%	-4.2%	-4.0%
South East	17,934	49,773	2,648	+0.1%	+2.0%	-9.6%

Domestic overnight trips to the South East during 2013 were consistent with 2012 (up 0.1% to 17.9 million trips), however the value of these trips fell by almost 10%, from £2.9 billion in 2012 to £2.65 billion in 2013).

Domestic overnight tourism to the South East – by purpose				Percentage change (2013 vs 2012)		
2013	**Trips ('000)**	**Bednights ('000)**	**Expenditure (£ million)**	**Trips (%)**	**Bednights (%)**	**Expenditure (%)**
Holiday	6,784	20,220	1,273	+2.1%	+4.4%	-11.9%
VFR	7,944	22,309	718	+3.3%	+8.5%	-11.7%
Business	2,684	6,141	596	-0.3%	-5.0%	+3.7%

The average trip duration for all domestic overnight visits to the South East in 2013 was 2.8 nights, with an average spend of £148 per trip and £53.20 per night.

Average trip duration and spend (South East) – by purpose of trip			
2013	**Avg. Spend per trip**	**Avg. Spend per night**	**Avg. trip duration**
Holiday	£188	£62.96	3.0
VFR	£90	£32.18	2.8
Business	£222	£97.05	2.3

Overnight trips made by visitors from overseas

Over the course of the year, overseas visitors made a total of 28.6 million overnight trips in England, an increase of 7% compared with 2012 and the highest volume recorded over the last eight years. Visitor nights were also up 7% compared with 2012, however trip expenditure increased by 13%.
The volume of overseas visitor trips to the South East also increased by 7% compared with 2012, however visitor nights increased by a modest 3% and visitor expenditure was up by 5% (average £436 per trip compared with £440 in 2012).

	South East			England		
	2012	2013	% change 2012 - 2013	2012	2013	% change 2012 - 2013
Total Visits (000)	4,308	4,587	7%	26,802	28,602	7%
Total Nights (000)	30,981	31,820	3%	203,067	216,975	7%
Total Spend (£m)	1,898	2,000	5%	16,262	18,397	13%

Overseas visitor trips to the South East accounted for 14% of all overseas visitor trips to the UK in 2013 and 10% of all overseas visitor expenditure in the UK. As usual, London enjoyed the largest proportion of overseas visitor trips and overseas visitor spend (51% and 54% respectively).

Overseas visitors to the UK – by region (2013)			
2013	Trips ('000)	Bednights ('000)	Expenditure (£ million)
London	16,784	97,439	11,256
South East	**4,587**	**31,820**	**2,000**
North West	2,415	17,100	1,076
South West	2,230	18,577	1,097
East of England	2,006	14,289	873
West Midlands	1,869	14,796	844
Yorkshire & Humberside	1,220	10,391	584
East Midlands	1,077	9,160	459
North East	431	3,398	208
Total England	**28,602**	**216,975**	**18,397**
Scotland	2,443	19,361	1,680
Wales	884	5,932	353
N. Ireland	366	2,133	208
Total UK	**32,813**	**245,296**	**20,844**

Tourism Day Visits

Figures published in the Great Britain Day Visits Survey (2013) indicate that there were 1,370 million Tourism Day Visits[1] undertaken in England during 2013 and that day visitors spent a very considerable £46 billion undertaking these trips. There were 219 million day visits undertaken in the South East with a total expenditure of £7,094 million.

Tourism Day Visits 2013 compared with 2012: Volume of visits and expenditure levels by England region				
Destination	**Volume of visits (million)**		**Expenditure on visits (£ million)**	
	2012	**2013**	**2012**	**2013**
Great Britain	1,712	1,588	£57,052	£53,947
England	1,467	1,370	£48,459	£46,024
Scotland	142	124	£4,651	£4,647
Wales	101	89	£3,834	£3,061
North East England	75	74	£2,472	£2,827
North West England	170	160	£5,394	£5,644
Yorkshire and The Humber	141	134	£3,802	£4,225
East Midlands	111	103	£3,327	£2,914
West Midlands	128	133	£3,913	£4,828
East of England	126	131	£3,825	£4,130
London	315	262	£12,852	£9,223
South East England	**245**	**219**	**£7,547**	**£7,094**
South West England	157	154	£5,328	£5,138

The average spend per tourism day trip in the South East was up slightly compared with 2012 at £32.39 per trip (£30.77 in 2012), and comparable with the average for England as a whole (£33.59).

The regional pattern is reflected across all counties in the South East, although there are some differences at local, destination level.

1.3   Volume & Value of Tourism - Arun

Overall, an estimated 589,234 staying trips were spent in Arun in 2013, of which around 528,892 were made by domestic visitors (90%) and 60,342 by overseas visitors (10%). Compared to 2013, the volume of domestic overnight trips increased by 2.2% and the volume of overnight trips made by visitors from overseas increased by 1.8%.

Staying trips resulted in an estimated 1.96 million bednights in the District, an increase of 1.2% compared to 2012.

Overnight trip expenditure remained very similar to 2012. Staying visitors spent just under £118 million on their trip.

Around 3.7 million tourism day trips were made to the District (lasting more than 3 hours and taken on an irregular basis) in 2013 which generated a further £121.6 million tourism expenditure. Compared to 2012, the volume of day trips increased by 1.6% and expenditure increased by 2.0%.

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[1] *Tourism Day Visits are defined as leisure day visits which lasted at least 3 hours, included specific leisure activities, were not taken on a regular basis and were located outside of the participant's 'usual environment'.*

Total expenditure by visitors to Arun is estimated to have been in the region of £239,480,000 in 2012, up marginally by 1.0% compared to 2012.

Once adjustments are made to recognise that some of this expenditure will take place outside the District (e.g. it is estimated that around 40% of expenditure on travel such as the purchase of petrol, coach and train fares, will be made at source of origin or on-route), total direct visitor expenditure is reduced to £227,581,000.

Additional tourism expenditure is however, generated by other sources, increasing the total amount of money spent in the District. It is estimated that expenditure on second homes and on goods and services purchased by friends and relatives visitors were staying with, or visiting, generated a further total £9,232,000 expenditure associated with overnights trips in 2013**.**

This brings direct expenditure generated by tourism in 2013 in the District to £236,813,000, up 1.0% compared to 2012.

Direct expenditure is translated to £319,526,000 worth of income for local businesses through additional indirect and induced effects. Compared to 2012, this represents a small increase of 0.8% in total tourism value.

This tourism-related expenditure is estimated to have supported 4,653 FTE jobs in Arun (similar to 2012, up by 0.8%). Many of these jobs are part-time or seasonal in nature and translate into an estimated 6,385 Actual Jobs.

These jobs are spread across a wide range of service sectors from catering and retail to public service jobs such as in local government, and not just tourism. According to the Office of National Statistics, there are 40,500 employee jobs across the District. Based on our estimates, total tourism related expenditure supported 15.8% of these jobs in the District in 2013.

2.   INTRODUCTION

2.1   Objectives of Study

This report examines the value, volume and resultant economic impact of tourism to the District of Arun. The study was undertaken by Tourism South East on behalf of West Sussex County Council using a widely recognised, industry specific methodology, known as the Cambridge Model. To date, this approach has been widely applied across England and the South East region to produce an indicative outline of the scale of tourism activity on a local area basis.

2.2   Background

Tourism is not an industry in the conventional sense of the word – i.e. the tourism product is not created out of a conventional production process and the methods used to measure tourism are not conventional ones. Essentially, the tourism industry serves our needs while we are away from our 'usual environment' by providing products and services, and represents an important part of many local economies.

Measuring the impact of visitor volumes at a local level has been an important issue for destination and countryside managers for years. Yet, the scale, diversity and nature of tourism makes quantification a challenge – for example:

- A plethora of businesses across many different sectors comprise the 'tourism product' e.g. accommodation businesses, visitor attractions, transport providers, retailers, restaurants, pubs, tea rooms etc.
- There are many different types of tourist – day visitors, staying visitors, visitors on holiday, visitors on business, plus visitors visiting friends and relatives, on language study etc. All these different markets behaviour in a different way with respect to trip frequency, spend per head, duration of stay etc.
- The nature of tourism itself creates problems as it is impossible to accurately monitor and record every visitor entering or leaving a geographical area.

It must, therefore, be stressed that calculating the value, volume and impact of tourism can never be a precise science. Theoretically, the best approach is implementing cordon surveys – but these are seldom affordable in practice and still engender a number of technical problems. Thus, the method chosen is always governed by issues of affordability, practically, data availability or attainability, data quality/ representativeness and comparability (both in a spatial and temporal sense).

It is for this reason, that the Cambridge Model – a computer based, industry specific model developed to calculate estimates of volume, value and economic impact of tourism on a county of District basis – has been used extensively.

2.3   The Cambridge Model: Background

For almost ten years, regional tourist boards across England have been working with Geoff Broom Associates in developing the Cambridge Model approach to estimate the value and volume of tourism to local authority areas.

The model was developed to provide an affordable method of calculating the value of tourism to local economies through using a range of readily available local data on an area's tourism product to disaggregate a range of regional/ county tourism statistics. The method is popular with local authorities as it is affordable and can readily use available local statistics to generate a view of the volume, value and economic impact of visitor activity in the area. Nevertheless, where additional local data exists e.g. high quality occupancy data, information on profile of visitor structure and associated spend etc – this enables the replacement of regional data in the first stages of the model. Business surveys can also be commissioned to generate local calibration of the economic stage of the model.

Indeed, although the Cambridge Model approach has been frequently labelled as being 'top-down', it is entirely possible to drive the model entirely by locally collected data, and thus introduce 'bottom-up elements'. Furthermore, the model utilises a standard methodology capable of application across the UK, and thus offers the potential for direct comparisons with similar destinations throughout the country.

2.4   Cambridge Model Version II

Since the inception of the original Cambridge Model approach, a number of changes have occurred to the model's methodology and the context of operation. Most importantly, autumn 2003 saw the launch of Cambridge Model Version II. This revised approach was developed from work undertaken for the South West Regional Development Agency and includes a number of enhancements. These include:

- greater use of local data within the standardised model e.g. occupancy data, information on local wage rates
- enhanced outputs, notably visitor nights by accommodation type, spend by accommodation type, impact of non-trip related spend
- more sophisticated economic impact analysis section
- adoption of a rolling average methodology for staying visitor value and volume[2]

2.5   Methodological Overview

2.5.1   Key Outputs

The model has two stages:

Stage 1: Calculates the volume and value of day and staying visitors to the study area.
Stage 2: Estimates the economic impact of this visitor spending in the local economy.

The Cambridge Model is therefore able to generate indicative estimates for the following:

➢   The volume of staying trips taken in the District by overseas and domestic visitors

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[2] *This approach offers the additional benefits of producing estimates using more county specific information and is based on three years worth of data for staying visitors – whilst providing additional outputs – notably expenditure and visitor nights by accommodation type.*

- ➢ The volume of visitor nights spend in the District by overseas and domestic visitors
- ➢ The number of leisure day visits taken from home to and within the District
- ➢ Visitor expenditure associated with these trips to the District, and its distribution across key sectors of the local tourism economy
- ➢ The value of additional business turnover generated by tourism activity within the District
- ➢ The level of direct, indirect and induced employment sustained by visitor expenditure within the District

For staying trips the model also offers a breakdown according to the type of accommodation used and the main purpose of visit, i.e. holiday, visiting friends and relatives, business, language school visit and 'other'[3] purposes.

2.5.2 Data Sources

In its standard form, the Cambridge Model uses a range of local data including details of accommodation stock, local occupancy rates, population, employment, local wage rates and visits to attractions. It applies this locally sourced information to regional estimates of tourism volume and expenditure derived from the following national surveys:

- Great Britain Tourism Survey (GBTS)
- International Passenger Survey (IPS)
- Great Britain Day Visits Survey (GBDVS)
- New Earnings Survey
- Census of Employment
- Census of Population
- Labour Force Survey
- Annual Business Inquiry.

As highlighted above, the Model allows estimates generated using the above existing data sources to be refined further using locally available survey data – to the extent that it is possible to drive the Model entirely by locally collected data. Locally collected data used in this study include:

- Audit of accommodation stock
- Average room and bed occupancy from local survey
- Number of visits to attractions from local survey
- Retail footfall from large retail outlets

2.5.3 Limitations of Model

The Model relies on a range of data sources, which in turn are based on different methodologies and are estimated to different levels of accuracy. The estimates generated by the Model can therefore only be regarded as indicative of the scale and importance of visitor activity in the local area. The Model cannot, for example, take account of any additions to, or leakage of, expenditure arising from visitors taking day trips into or out of the area in which they are staying. It is likely, however, that these broadly balance each other in many areas.

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[3] 'Other' visitors typically include visitors coming to an area for reasons such as education and training, social or sporting events, or even business matters relating to personal or family duties.

2.5.4   Accuracy of the model

As with all models, the outputs need to be viewed in the context of local information and knowledge. Because of the nature of tourism and the modelling process, this model (as with other approaches) can only produce indicative estimates and not absolute values.

The Cambridge Model approach has been independently validated (R Vaughan, Bournemouth University) and was judged robust and the margins of error acceptable and in line with other modelling techniques. Tourism South East, also implement a number of measures to ensure that outputs are indicative as possible, through working with the local authority to audit accommodation to ensure that data inputs on accommodation capacity are as accurate as possible, and ensuring a high degree of transparency in the process (methodology employed, data used, assumptions made)

As a result, there should be confidence that the estimates produced are as reliable as is practically possible within the constraints of the information available.

Please note that the Cambridge Model rounds numbers to the nearest 1,000. Trips, nights and expenditure considerably lower than 1,000 will not appear on the tables.

3. TABLES OF RESULTS

TABLE 1: STAYING TRIPS BY ACCOMMODATION						
	UK		Overseas		Total	
Serviced	237,078	44.8%	23,841	39.5%	260,919	44.3%
Non-serviced	163,173	30.9%	7,787	12.9%	170,960	29.0%
Group/campus	4,144	0.8%	1,036	1.7%	5,180	0.9%
Second homes	3,544	0.7%	0	0.0%	3,544	0.6%
Boat moorings	2,095	0.4%	0	0.0%	2,095	0.4%
Paying guests	0	0.0%	2,167	3.6%	2,167	0.4%
VFR home	118,857	22.5%	25,511	42.3%	144,368	24.5%
Total 2013	528,892		60,342		589,234	
Total 2012	517,268		59,291		576,559	
% change	2.2%		1.8%		2.2%	

TABLE 2: STAYING NIGHTS BY ACCOMMODATION						
	UK		Overseas		Total	
Serviced	463,281	29.3%	85,351	22.6%	548,632	28.0%
Non-serviced	686,466	43.4%	35,258	9.3%	721,724	36.8%
Group/campus	35,226	2.2%	7,252	1.9%	42,478	2.2%
Second homes	17,515	1.1%	0	0.0%	17,515	0.9%
Boat moorings	3,142	0.2%	0	0.0%	3,142	0.2%
Paying guests	0	0.0%	13,533	3.6%	13,533	0.7%
VFR home	376,823	23.8%	236,390	62.6%	613,213	31.3%
Total 2013	1,582,453		377,784		1,960,237	
Total 2012	1,569,322		367,363		1,936,685	
% change	0.8%		2.8%		1.2%	

TABLE 3: STAYING SPEND BY ACCOMMODATION						
	UK		Overseas		Total	
Serviced	£52,929,886	56.7%	£10,184,547	41.5%	£63,114,433	53.6%
Non-serviced	£27,183,647	29.1%	£2,026,481	8.3%	£29,210,128	24.8%
Group/campus	£687,134	0.7%	£518,033	2.1%	£1,205,167	1.0%
Second homes	£737,254	0.8%	£0	0.0%	£737,254	0.6%
Boat moorings	£74,473	0.1%	£0	0.0%	£74,473	0.1%
Paying guests	£0	0.0%	£933,333	3.8%	£933,333	0.8%
VFR home	£11,685,335	12.5%	£10,873,935	44.3%	£22,559,270	19.1%
Total 2013	£93,297,728		£24,536,329		£117,834,057	
Total 2012	£93,413,094		£24,513,188		£117,926,282	
% change	-0.1%		0.1%		-0.1%	

TABLE 4: TOURISM DAY VISITS		
	Trips	Spend
Total 2013	3,720,000	£121,644,000
Total 2012	3,660,000	£119,279,400
% change	1.6%	2.0%

TABLE 5: BREAKDOWN OF EXPENDITURE ASSOCIATED WITH TRIPS							
	Accomm.	Shopping	Food and drink	Attractions/ entertain.	Travel	Total	%
UK Tourists	£29,254,000	£15,844,000	£21,425,000	£9,852,000	£16,923,000	£93,298,000	39%
Overseas tourists	£6,831,000	£7,654,000	£3,601,000	£4,914,000	£1,537,000	£24,537,000	10%
Total	£36,085,000	£23,498,000	£25,026,000	£14,766,000	£18,460,000	£117,835,000	
%	30.6%	19.9%	21.2%	12.5%	15.7%		
Tourist day visitors	£0	£53,507,000	£45,146,000	£11,705,000	£11,287,000	£121,645,000	51%
%	0.0%	44.0%	37.1%	9.6%	9.3%		

Note: Figures have been rounded

TABLE 6: TOTAL BREAKDOWN OF EXPENDITURE ASSOCIATED WITH ALL TRIPS						
	Accomm.	Shopping	Food and drink	Attractions/e ntertain.	Travel	Total
Total 2013	£36,085,000	£77,005,000	£70,172,000	£26,471,000	£29,747,000	£239,480,000
%	15.1%	32.2%	29.3%	11.1%	12.4%	
Total 2012						£237,205,000
% Change						1.0%

Note: Figures have been rounded

TABLE 7: DIRECT BUSINESS TURNOVER DERIVED FROM TRIP EXPENDITURE						
	Staying tourists		Day visitors			Total
Accommodation	£36,585,000	33%	£903,000	1%	£37,488,000	16%
Retail	£23,263,000	21%	£52,972,000	45%	£76,235,000	33%
Catering	£24,276,000	22%	£43,792,000	37%	£68,068,000	30%
Attraction/entertain	£15,251,000	14%	£12,691,000	11%	£27,942,000	12%
Transport	£11,076,000	10%	£6,772,000	6%	£17,848,000	8%
Total [1]	£110,451,000		£117,130,000		£227,581,000	
Other expenditure [2]					£9,232,000	
Total 2013 with 'other'.					£236,813,000	
Total 2012 with 'other'.					£234,778,000	
% Change					1%	

Note: Figures have been rounded
[1] Adjustments have been made to visitor expenditure by sector to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. A small proportion of day trip spend will also fall into 'Accommodation' where day visitors have eaten in restaurants/bars of hotels. Furthermore, it is assumed that 40% of travel expenditure occurs outside the destination

[2] Apart from the spending associated with the individual trips, additional spending by non-visitors, e.g. friends and relatives with whom the visitor is staying with will also take place. Moreover, owners of second homes/boats will spend some money on maintenance, repair. Data is only available for additional expenditure made related to overnight trips.

TABLE 8: INDIRECT BUSINESS TURNOVER ARISING FROM THE PURCHASE OF SUPPLIES AND SERVICES BY BUSINESSES			
	Staying tourists	Day visitors	Total
Businesses in receipt of trip spend	£31,991,000	£22,228,000	£54,219,000
Indirect turnover from 'other' expenditure	£1,846,000	£0	£1,846,000
Income induced spending	£14,609,000	£12,039,000	£26,648,000
Total	£48,446,000	£34,267,000	£82,713,000

Note: Figures have been rounded

TABLE 9: TOTAL LOCAL BUSINESS TURNOVER SUPPORTED BY ALL TOURISM ACTIVITY			
	Staying tourists	Day visitors	Total
Direct	£119,683,000	£117,130,000	£236,813,000
Supplier/ income induced	£48,446,000	£34,267,000	£82,713,000
Total 2013	£168,129,000	£151,397,000	£319,526,000
Total 2012	£168,489,000	£148,453,000	£316,942,000
% change	-0.2%	2.0%	0.8%

Note: Figures have been rounded

TABLE 10: TOURISM SUPPORTED JOBS	
Total FTE 2013	4,653
Total FTE 2012	4,618
% change	0.8%
Actual 2013	6,385
Actual 2012	6,335
% change	0.8%

TABLE 11: PROPORTION OF TOTAL JOBS SUSTAINED ACROSS ALL SECTORS	
	Total
Total employed [3]	40,500
Tourism employment	6,385
Tourism proportion	15.8%

[3] Total labour force is based on all employees incl. part-time (excludes government-supported trainees and HM Force and self-employment). The information comes from the Business Register and Employment Survey (BRES) an employer survey conducted by ONS in December of each year.