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Economic Impact of Tourism

Hertfordshire - 2022 Results

November 2023

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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 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 there was 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 show significant improvements compared to 2021, although they are still 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 of 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 billion 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 spend on Tourism Day Visits in England in the last 9 months of 2021 was £39, increasing by 4% in 2022 to £40.

East of England registered 110 million tourism day trips made by British residents between January to December 2022. These trips accounted for a total of £3.42 billion in spend.

The 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 60% and the total spend by 60%.

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 nights, with an average spend per trip of £258 and average spend of £87 per night. England 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%.

The East of England registered 10.4 million overnight trips made by British residents between January to December 2022. These trips accounted for a total of 31.4 million nights and contributed a total of £2.32 billion in spend.

International Passenger Survey (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 2022 in nominal terms, without taking inflation into account, 9% below the record spend set in 2019 (18% in real terms).

East of England

The East of England hosted a little over 2 million international visits in 2022, 10% fewer than in 2019. Visitors spent a touch over £1 billion in the region, on par with 2019 results (just 1% below).

Comparability

The cost of living increased sharply across the UK during 2022 and the average annual inflation rate for 2022 was 8.0%. The Cambridge Model normally reports expenditure levels in nominal terms (not taking inflation into account). However, due to the unusually high levels of inflation, we have also considered real terms values (adjusted for inflation) when preparing the results, in order to provide a more accurate assessment of the post-pandemic tourism recovery levels.

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:

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%	-55%	-35%
East of England				
% difference from 2019 visit volume		-40%	-23%	-8%

Accommodation Occupancy

Every month, the England Occupancy Survey (EOS) measures bedroom and bedspace occupancy across the serviced accommodation sector. It is possible that hotel occupancy measures overstate trips compared to previous years because of ongoing workforce shortages: As a result, some establishments closed on certain days or reduced the number of rooms available. This means that the number of rooms occupied could be lower while the occupancy rate was the same, due to fewer available rooms.

Accommodation Occupancy - Room Occupancy - England		
Year	**Average annual room occupancy**	**Difference from 2019**
2019	78%	
2021	52%	-26%
2022	73%	-4%

Economic Impact of Tourism – Headline Figures

Hertfordshire - 2022 Results

Total number of trips (day & staying)
25,004,300

Total staying trips
1,633,300

Total staying nights
8,954,700

Total staying spend
£482,355,000

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

Associated spend
£170,728,000

Total day trips
23,371,000

Total day trip spend
£927,774,000

Total visitor spend
£1,507,621,000

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).

Includes purchase of supplies and services (indirect) and spending of wages by employees whose jobs are supported by visitor spending (induced).

Indirect / induced spend
£701,958,040

Total Tourism Value
£2,209,579,040

Full time equivalent jobs
29,512

Total actual tourism related employment
38,936

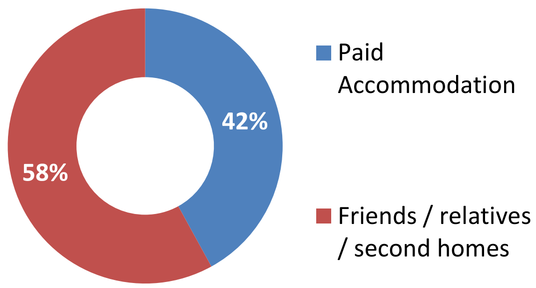
Percentage of all employment
6%

Economic Impact of Tourism – Year on year comparisons

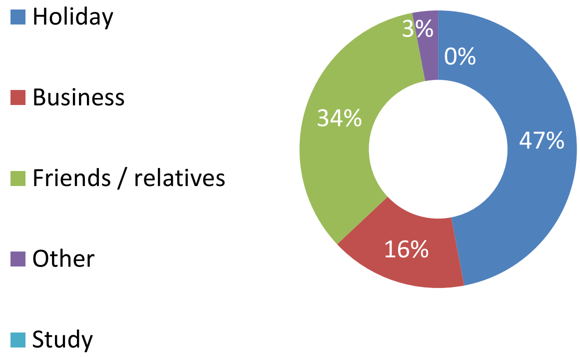
				Year-on-year comparison	Pre-pandemic levels
Day Trips	**2022**	**2021**	**2019**	**2022 v 2021**	**2022 v 2019**
Day trips Volume	23,371,000	18,154,000	27,072,000	29%	-14%
Day trips Value	£927,774,000	£691,007,000	£1,049,479,000	34%	-12%
Overnight trips					
Number of trips	1,633,300	1,405,200	1,923,000	16%	-15%
Number of nights	8,954,700	7,193,800	10,241,000	24%	-13%
Trip value	£482,355,000	£303,142,000	£499,203,000	59%	-3%
Total Value	**£2,209,579,040**	**£1,581,076,000**	**£2,427,434,000**	**40%**	**-9%**
Actual Jobs	**38,936**	**33,889**	**43,390**	**15%**	**-10%**

	2022	**2021**	**2019**	**2022 v 2021**	**2022 v 2019**
Average length stay (nights x trip)	5.48	5.12	5.33	7.0%	2.8%
Spend x overnight trip	£ 295.33	£ 215.73	259.60	36.9%	13.8%
Spend x night	£ 53.87	£ 42.14	48.75	27.8%	10.5%
Spend x day trip	£ 39.70	£ 38.06	38.77	4.3%	2.4%

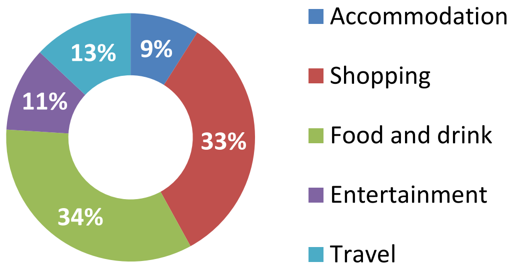
Trips by type of accommodation



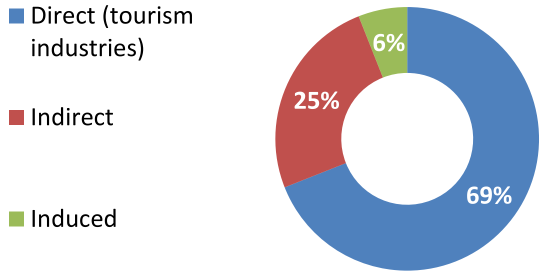
Trips by Purpose

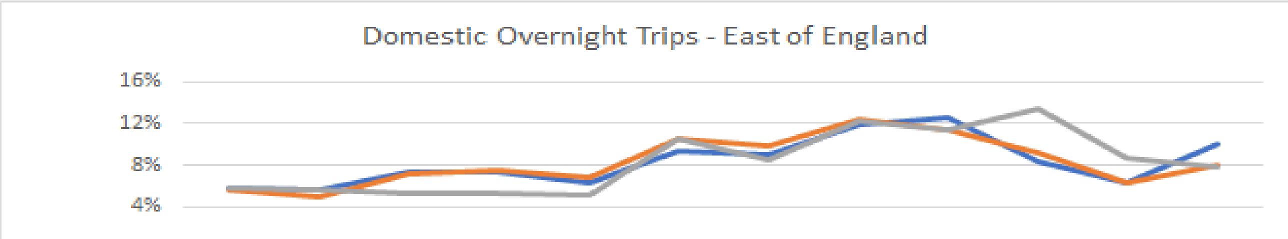


Breakdown of expenditure

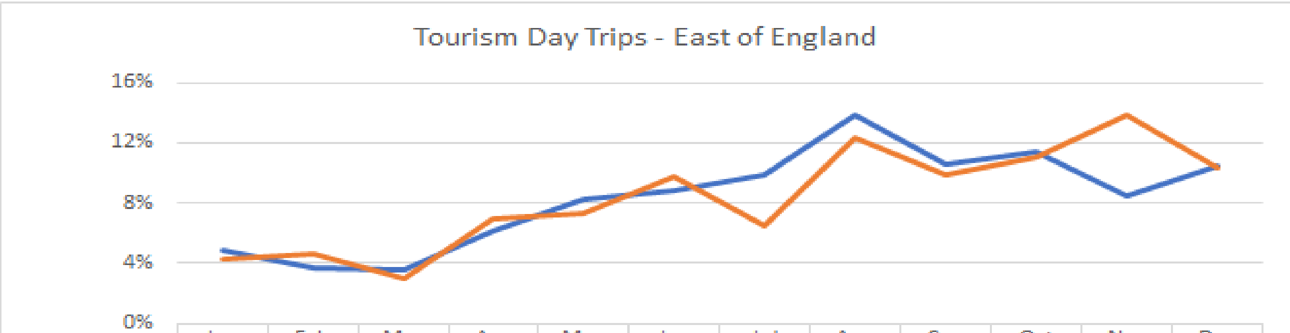


Type of employment





	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trips	6%	6%	7%	7%	6%	9%	9%	12%	12%	8%	6%	10%
Nights	6%	5%	7%	7%	7%	11%	10%	12%	11%	9%	6%	8%
Spend	6%	6%	5%	5%	5%	11%	8%	12%	11%	13%	9%	8%



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Trips	5%	4%	4%	6%	8%	9%	10%	14%	11%	11%	9%	10%
Value	4%	5%	3%	7%	7%	10%	6%	12%	10%	11%	14%	10%

Volume of Tourism

Staying visits in the county context

Staying trips in the county context

All figures have been rounded and some tables may show slight discrepancy between totals and sub totals.

District	Domestic trips ('000)	Overseas trips ('000)
North Herts	131	33
Stevenage	105	22
East Herts	177	42
Broxbourne	94	24
Welwyn Hatfield	130	36
St Albans	186	42
Dacorum	191	39
Three Rivers	62	24
Watford	137	26
Hertsmere	106	26
Hertfordshire	**1,319**	**314**

Staying nights in the county context

District	Domestic nights ('000)	Overseas nights ('000)
North Herts	623	252
Stevenage	450	137
East Herts	860	467
Broxbourne	475	191
Welwyn Hatfield	612	606
St Albans	817	338
Dacorum	849	331
Three Rivers	354	164
Watford	550	184
Hertsmere	491	204
Hertfordshire	**6,081**	**2,874**

Expenditure in the county context

District	Domestic spend (millions)	Overseas spend (millions)
North Herts	£30.1	£13.6
Stevenage	£25.5	£7.7
East Herts	£42.1	£27.5
Broxbourne	£20.1	£10.3
Welwyn Hatfield	£32.7	£36.2
St Albans	£45.5	£18.9
Dacorum	£50.0	£19.1
Three Rivers	£12.9	£8.6
Watford	£34.6	£10.6
Hertsmere	£25.1	£11.2
Hertfordshire	**£318.6**	**£163.7**

Staying Visitors - Accommodation Type

Hertfordshire - 2022 Results

Trips by Accommodation

	UK		Overseas		Total	
Serviced	491,000	37%	17,900	6%	508,900	31%
Self catering	13,000	1%	6,000	2%	19,000	1%
Camping	18,000	2%	3,800	1%	21,800	1%
Static caravans	0	0%	0	0%	0	0%
Group/campus	14,000	1%	4,400	1%	18,400	1%
Paying guest	0	0%	8,300	3%	8,300	1%
Second homes	5,000	0%	5,900	2%	10,900	1%
Boat moorings	18,000	2%	0	0%	18,000	1%
Other	63,000	5%	34,100	11%	97,100	6%
Friends & relatives	697,000	52%	233,900	74%	930,900	57%
Total 2022	**1,319,000**		**314,300**		**1,633,300**	
Comparison 2021	**1,277,000**		**128,200**		**1,405,200**	
Difference	**3%**		**145%**		**16%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	1,248,000	21%	38,300	1%	1,286,300	14%
Self catering	48,000	1%	493,500	17%	541,500	6%
Camping	156,000	2%	21,400	1%	177,400	2%
Static caravans	0	0%	0	0%	0	0%
Group/campus	52,000	1%	180,800	6%	232,800	3%
Paying guest	0	0%	83,700	3%	83,700	1%
Second homes	17,000	0%	145,900	5%	162,900	2%
Boat moorings	74,000	1%	0	0%	74,000	1%
Other	340,000	6%	40,800	2%	380,800	4%
Friends & relatives	4,146,000	68%	1,869,300	65%	6,015,300	67%
Total 2022	**6,081,000**		**2,873,700**		**8,954,700**	
Comparison 2021	**6,168,000**		**1,025,800**		**7,193,800**	
Difference	**-1%**		**180%**		**24%**	

Spend by Accommodation

	UK		Overseas		Total	
Serviced	£143,968,000	45%	£8,144,000	5%	£152,112,000	31%
Self catering	£4,900,000	2%	£19,761,000	12%	£24,661,000	5%
Camping	£3,156,000	1%	£822,000	1%	£3,978,000	1%
Static caravans	£0	0%	£0	0%	£0	0%
Group/campus	£5,224,000	2%	£9,982,000	6%	£15,206,000	3%
Paying guest	£0	0%	£4,408,000	3%	£4,408,000	1%
Second homes	£1,106,000	0%	£4,815,000	3%	£5,921,000	1%
Boat moorings	£4,119,000	1%	£0	0%	£4,119,000	1%
Other	£17,344,000	5%	£5,353,000	3%	£22,697,000	5%
Friends & relatives	£138,791,000	44%	£110,462,000	67%	£249,253,000	52%
Total 2022	**£318,608,000**		**£163,747,000**		**£482,355,000**	
Comparison 2021	**£260,344,000**		**£42,798,000**		**£303,142,000**	
Difference	**22%**		**283%**		**59%**	

Serviced accommodation includes hotels, guesthouses, inns, B&Bs 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

Hertfordshire - 2022 Results

Trips by Purpose

	UK		Overseas		Total	
Holiday	725,000	55%	50,300	16%	775,300	47%
Business	251,000	19%	9,400	3%	260,400	16%
Friends & relatives	303,000	23%	238,900	76%	541,900	34%
Other	40,000	3%	12,600	4%	52,600	3%
Study	0	0%	3,100	1%	3,100	0%
Total 2022	**1,319,000**		**314,300**		**1,633,300**	
Comparison 2021	**1,277,000**		**128,200**		**1,405,200**	
Difference	**3%**		**145%**		**16%**	

Nights by Purpose

	UK		Overseas		Total	
Holiday	3,527,000	58%	258,600	9%	3,785,600	42%
Business	973,000	16%	0	0%	973,000	11%
Friends & relatives	1,459,400	24%	2,500,200	87%	3,959,600	44%
Other	121,600	2%	114,900	4%	236,500	3%
Study	0	0%	0	0%	0	0%
Total 2022	**6,081,000**		**2,873,700**		**8,954,700**	
Comparison 2021	**6,168,000**		**1,025,800**		**7,193,800**	
Difference	**-1%**		**180%**		**24%**	

Spend by Purpose

	UK		Overseas		Total	
Holiday	£117,885,000	37%	£32,749,000	20%	£150,634,000	31%
Business	£111,513,000	35%	£8,187,000	5%	£119,700,000	25%
Friends & relatives	£82,838,000	26%	£104,799,000	64%	£187,637,000	39%
Other	£6,372,000	2%	£13,100,000	8%	£19,472,000	4%
Study	£0	0%	£4,912,000	3%	£4,912,000	1%
Total 2022	**£318,608,000**		**£163,747,000**		**£482,355,000**	
Comparison 2021	**£260,344,000**		**£42,798,000**		**£303,142,000**	
Difference	**22%**		**283%**		**59%**	

Overseas Overnight Visitors to Hertfordshire - National ranking by volume and value of visits

Top 10 nations by volume of Visits (000s)		Top 10 nations by volume of spend (£m)	
Irish Republic	59.2	USA	£36.77
France	45.7	Irish Republic	£17.78
USA	45.6	France	£13.63
Netherlands	27.9	Poland	£12.38
Spain	24.0	Netherlands	£7.95
Germany	22.2	Germany	£7.63
Romania	15.4	India	£7.36
Norway	12.1	Romania	£7.11
Poland	12.1	Sweden	£6.06
Sweden	11.2	Spain	£5.90

Source: International Passenger Survey - Hertfordshire, 2022

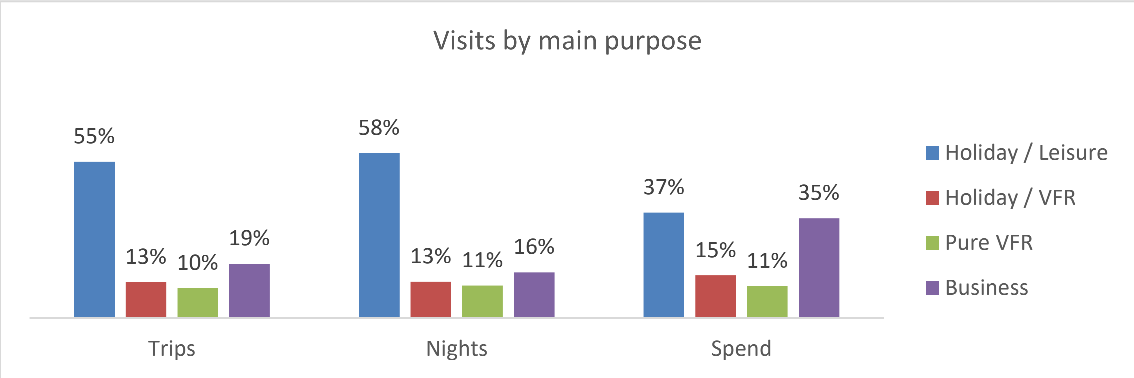
Domestic Overnight Visitors - Purpose of Trip　　　Hertfordshire - 2022 Results

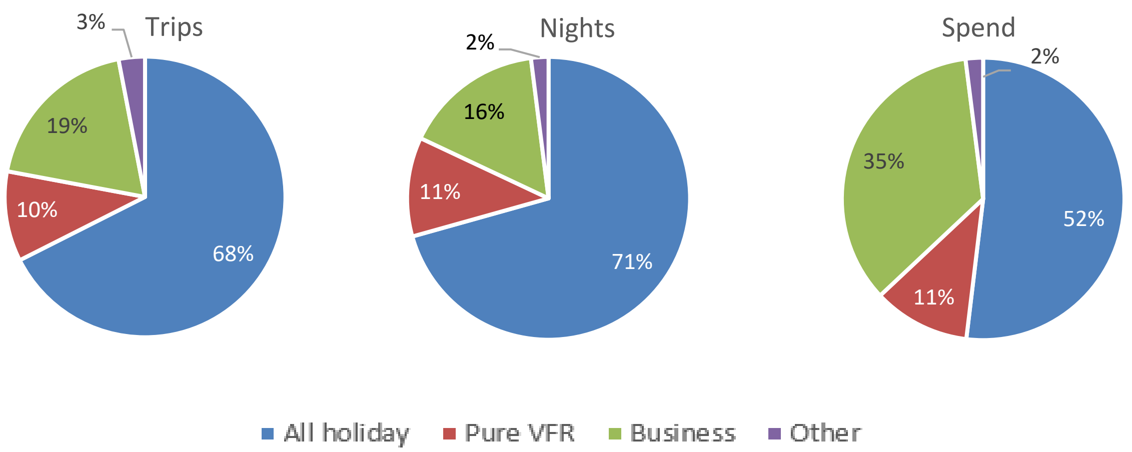
Total holiday trips include visits to destinations in Hertfordshire for pleasure / leisure purposes staying with friends and relatives. Pure VFR are visits to friends and relatives for social and personal reasons, and do not include holiday trips staying with friends and relatives.

	Trips		Nights		Expenditure	
Holiday / Leisure	725,000	55%	3,527,000	58%	£117,885,000	37%
Holiday / VFR	166,000	13%	769,000	13%	£47,494,000	15%
Pure VFR	137,000	10%	690,400	11%	£35,344,000	11%
Business	251,000	19%	973,000	16%	£111,513,000	35%
Other	40,000	3%	121,600	2%	£6,372,000	2%
Total	**1,319,000**		**6,081,000**		**£318,608,000**	

Holiday trips involving paid accommodation make up the largest proportion of domestic trips and incur the highest average spend per trip and night. Pure VFR trips (i.e. for social and personal reasons excluding holiday) are the shortest in length and are subject to the lowest levels of expenditure.

	Holiday / Leisure	Holiday / VFR	Pure VFR	Business
Average length stay (nights x trip)	4.9	4.6	5.0	3.9
Spend x overnight trip	£162.60	£286.11	£257.99	£444.27
Spend x night	£33.42	£61.76	£51.19	£114.61





Total Volume and Value of Day Trips

	Trips		Spend	
Urban visits	**16,611,000**	71%	**£779,855,000**	84%
Countryside visits	**6,760,000**	29%	**£147,919,000**	16%
Total 2022	**23,371,000**	**100%**	**£927,774,000**	**100%**
Comparison 2021	18,154,000		£691,007,000	
Difference		**29%**	**34%**	

Day Visitors in the county context

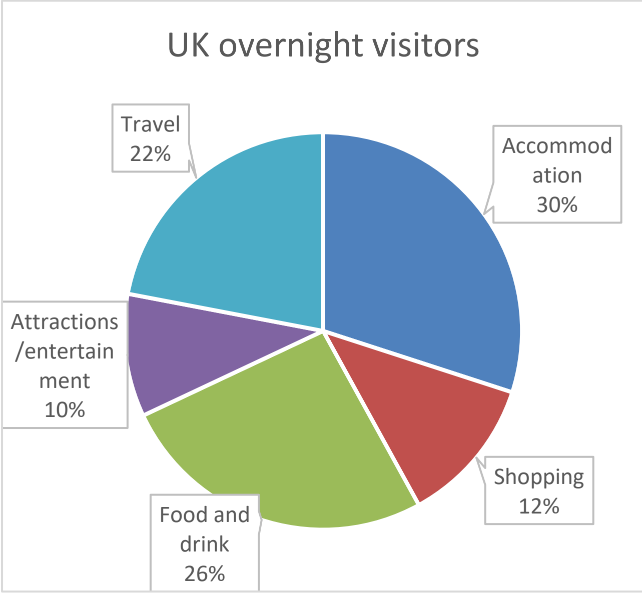
All figures have been rounded and some tables may show slight discrepancy between totals and sub totals.

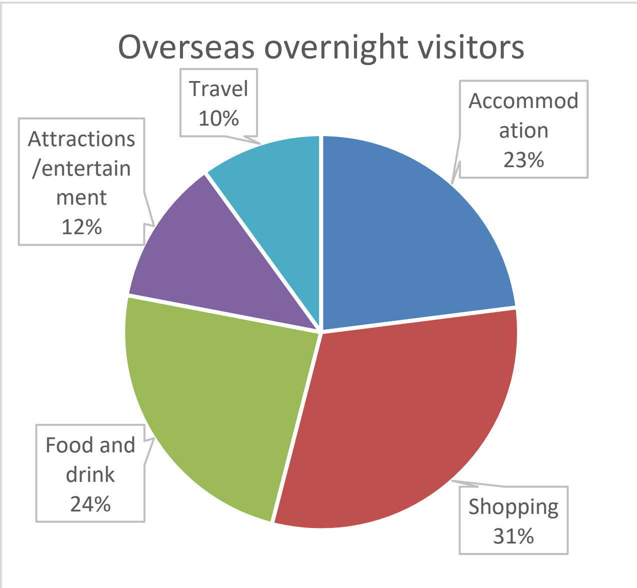
District	Day Visits (millions)	Day visit Spend (millions)
North Herts	2.9	£110.0
Stevenage	1.7	£63.8
East Herts	4.2	£164.4
Broxbourne	1.2	£47.7
Welwyn Hatfield	1.8	£88.2
St Albans	1.8	£69.5
Dacorum	3.3	£130.7
Three Rivers	3.4	£142.3
Watford	1.7	£64.9
Hertsmere	1.4	£46.3
Hertfordshire	23.4	£927.8

Value of Tourism

Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£95,582,400	£38,233,000	£82,838,000	£31,860,800	£70,093,800	£318,608,000
Overseas tourists		£37,661,800	£50,761,600	£39,299,300	£19,649,600	£16,374,700	£163,747,000
Total Staying		£133,244,200	£88,994,600	£122,137,300	£51,510,400	£86,468,500	£482,355,000
Total Staying (%)		28%	18%	25%	11%	18%	100%
Total Day Visitors		£0	£371,109,600	£361,831,900	£102,055,100	£92,777,400	£927,774,000
Total Day Visitors (%)		0%	40%	39%	11%	10%	100%
Total	**2022**	**£133,244,200**	**£460,104,200**	**£483,969,200**	**£153,565,500**	**£179,245,900**	**£1,410,129,000**
%		**9%**	**33%**	**34%**	**11%**	**13%**	**100%**
Comparison	**2021**	**£76,249,000**	**£252,711,000**	**£357,823,200**	**£116,694,400**	**£190,671,400**	**£994,149,000**
Difference		**75%**	**82%**	**35%**	**32%**	**-6%**	**42%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£1,656,000	£700,000	£0	£168,372,000	£170,728,000

Spend on second homes is assumed to be an average of £2,050 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,050 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 £2,050. 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 and personal visits.

Direct Turnover Derived From Trip

Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending.

	Staying Visitors	Day Visitors	Total
Accommodation	£136,563,000	£7,165,000	£143,728,000
Retail	£88,269,000	£367,422,000	£455,691,000
Catering	£117,554,000	£347,467,000	£465,021,000
Attractions	£53,649,000	£108,957,000	£162,606,000
Transport	£51,789,000	£58,058,000	£109,847,000
Non-trip spend	£170,728,000	£0	£170,728,000
Total Direct 2022	**£618,552,000**	**£889,069,000**	**£1,507,621,000**
Comparison 2021	**£456,747,000**	**£638,239,000**	**£1,094,986,000**
Difference	**35%**	**39%**	**38%**

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

Supplier and Income Induced Turnover

	Staying Visitors	Day Visitors	Total
Indirect spend	£194,178,670	£318,056,200	£512,234,870
Non trip spending	£43,838,130	£0	£43,838,130
Income induced	£101,219,650	£44,665,390	£145,885,040
Total 2022	**£339,236,450**	**£362,721,590**	**£701,958,040**
Comparison 2021	**£253,069,000**	**£233,021,000**	**£486,090,000**
Difference	**34%**	**56%**	**44%**

Income induced spending arises from expenditure by employees whose jobs are supported by tourism spend.

Total Local Business Turnover Supported by Tourism Activity – Value of Tourism

	Staying Visitors	Day Visitors	Total
Direct	£618,552,000	£889,069,000	£1,507,621,000
Indirect	£339,236,450	£362,721,590	£701,958,040
Total Value 2022	**£957,788,450**	**£1,251,790,590**	**£2,209,579,040**
Comparison 2021	**£709,816,000**	**£871,260,000**	**£1,581,076,000**
Difference	**35%**	**44%**	**40%**

Employment

Employment   Hertfordshire - 2022 Results

The model generates estimates of full time equivalent jobs based on visitor spending. The total number of 'actual' jobs will be higher when part time and seasonal working is taken into account. Conversion of full time equivalent jobs into actual jobs relies on information from business surveys in the sectors receiving visitor spending. A new Full Time Equivalent tourism job is created with every £54,000 increase in tourism revenue.

Direct employment

		Full time equivalent (FTE)					
		Staying Visitors		Day Visitor		Total	
Accommodation		2,168	25%	115	1%	2,283	12%
Retailing		704	8%	2,909	28%	3,613	19%
Catering		1,748	21%	5,240	51%	6,988	37%
Entertainment		916	11%	1,904	19%	2,820	15%
Transport		312	4%	71	1%	383	2%
Non-trip spend		2,675	31%	0	0%	2,675	15%
Total FTE	**2022**	**8,523**		**10,239**		**18,762**	
Comparison	**2021**	**7,461**		**8,616**		**16,077**	
Difference		**14%**		**19%**		**17%**	
		Estimated actual jobs					
		Staying Visitors		**Day Visitor**		**Total**	
Accommodation		3,208	29%	20	0%	3,228	12%
Retailing		1,056	9%	4,363	28%	5,419	20%
Catering		2,622	23%	7,860	51%	10,482	39%
Entertainment		1,291	12%	2,684	18%	3,975	15%
Transport		34	0%	493	3%	527	2%
Non-trip spend		3,049	27%	0	0%	3,049	12%
Total Actual	**2022**	**11,260**		**15,420**		**26,680**	
Comparison	**2021**	**9,770**		**12,717**		**22,487**	
Difference		**15%**		**21%**		**19%**	

Indirect & Induced Employment

		Full time equivalent (FTE)		
		Staying Visitor	Day Visitors	Total
Indirect jobs		3,645	4,871	8,516
Induced jobs		1,550	684	2,234
Total FTE	**2022**	**5,195**	**5,555**	**10,750**
Comparison	**2021**	**5,208**	**4,795**	**10,003**
Difference		**0%**	**16%**	**7%**

		Estimated actual jobs		
		Staying Visitors	Day Visitors	Total
Indirect jobs		4,156	5,553	9,709
Induced jobs		1,767	780	2,547
Total Actual	**2022**	**5,923**	**6,333**	**12,256**
Comparison	**2021**	**5,936**	**5,466**	**11,402**
Difference		**0%**	**16%**	**7%**

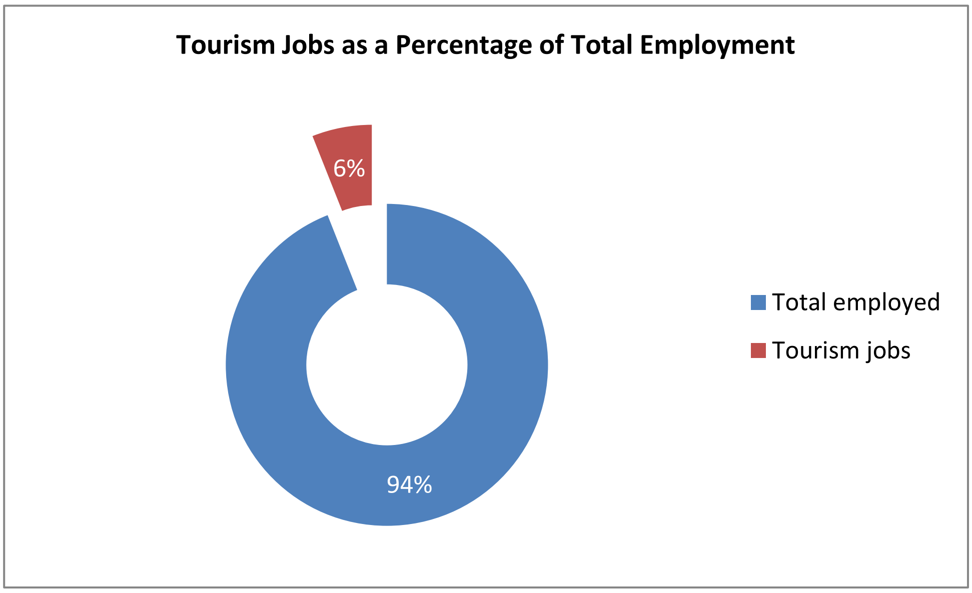
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitors		Day Visitor		Total	
Direct		8,523	62%	10,239	66%	18,762	64%
Indirect		3,645	27%	4,871	30%	8,516	29%
Induced		1,550	11%	684	4%	2,234	7%
Total FTE	**2022**	**13,718**		**15,794**		**29,512**	
Comparison	2021	12,669		13,411		26,080	
Difference		8%		18%		13%	

Estimated actual jobs							
		Staying Visitors		Day Visitor		Total	
Direct		11,260	66%	15,420	71%	26,680	69%
Indirect		4,156	24%	5,553	25%	9,709	25%
Induced		1,767	10%	780	4%	2,547	6%
Total Actual	**2022**	**17,183**		**21,753**		**38,936**	
Comparison	2021	15,706		18,183		33,889	
Difference		9%		20%		15%	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitors	Day visitors	Total
Total employed		622,000	622,000	622,000
Tourism jobs		17,183	21,753	38,936
Proportion all jobs		**3%**	**3%**	**6%**
Comparison	2021	15,706	18,183	33,889
Difference		9%	20%	15%



The key 2022 results of the Economic Impact Assessment are:

25.0 million trips were undertaken in the area
23.4 million day trips
1.6 million overnight visits

9.0 million nights in the area as a result of overnight trips

£1,508 million spent by tourists during their visit to the area
£126 million spent on average in the local economy each month.

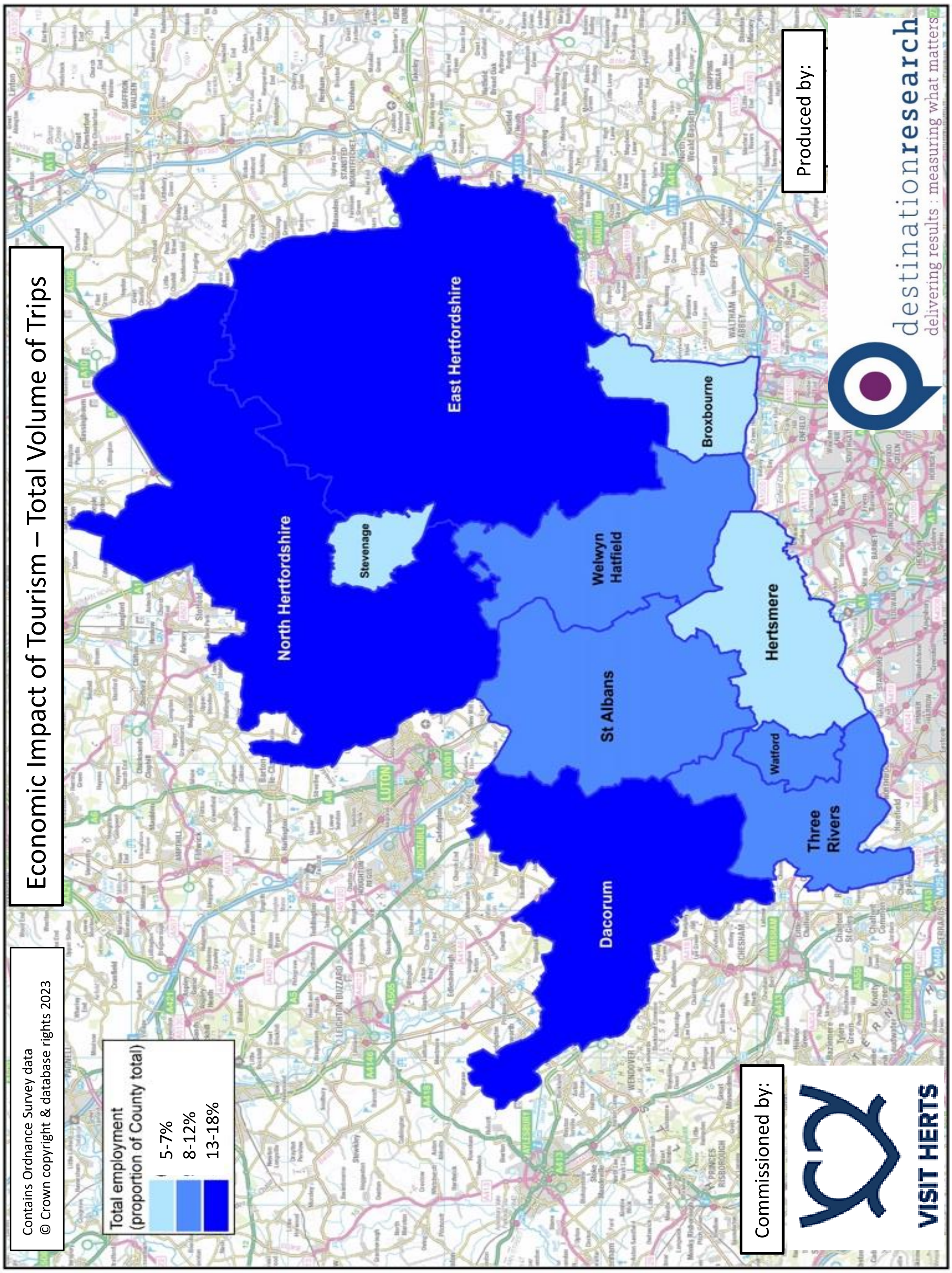
£482 million generated by overnight visits
£928 million generated from day trips.

£2,210 million spent in the local area as result of tourism, taking into account multiplier effects.

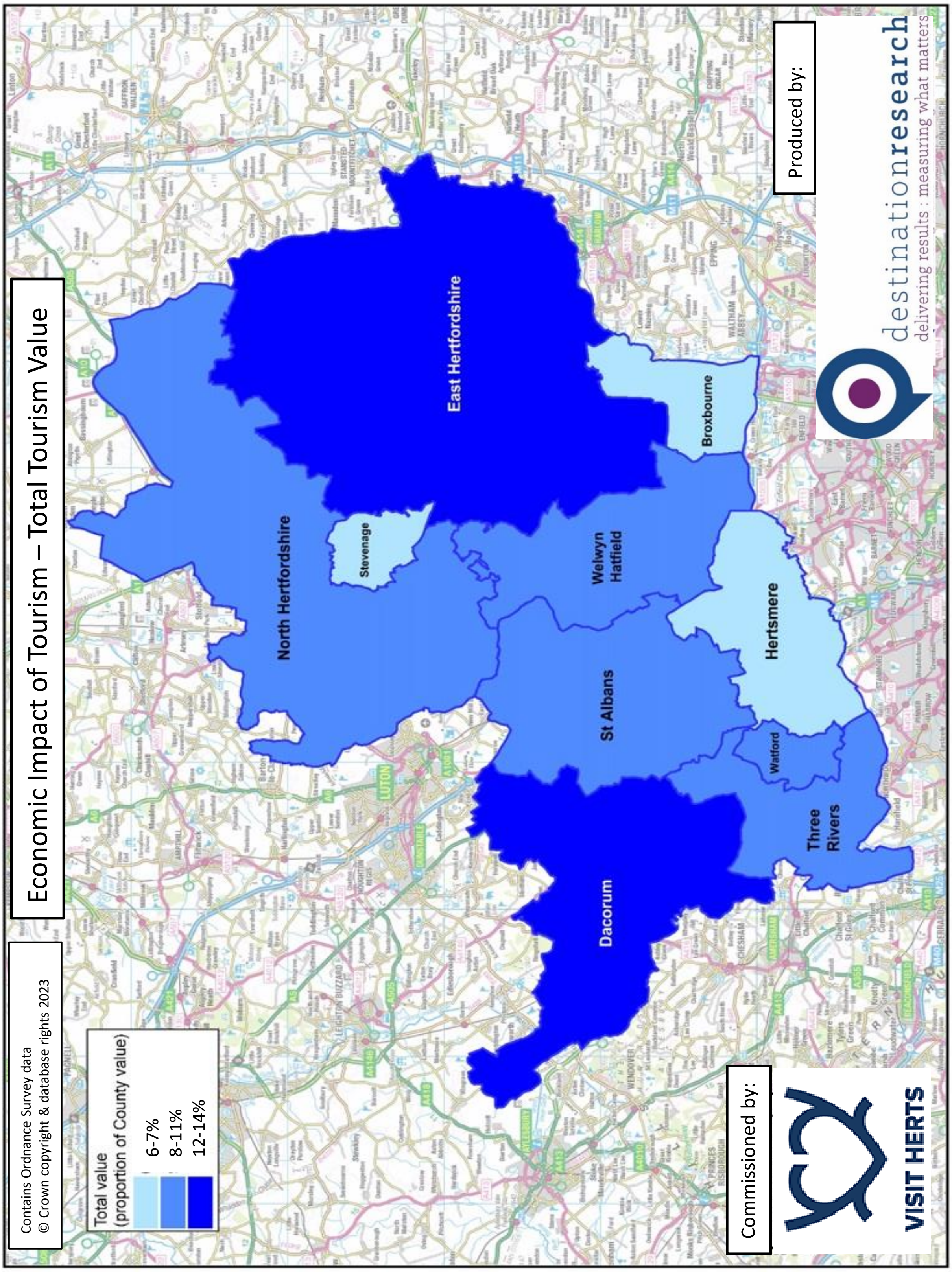
38,936 jobs supported, both for local residents.
26,680 tourism jobs directly supported
12,256 non-tourism related jobs supported linked to multiplier spend from tourism.

Note: The figues have been rounded. For a full set of results, please refer to the main report.

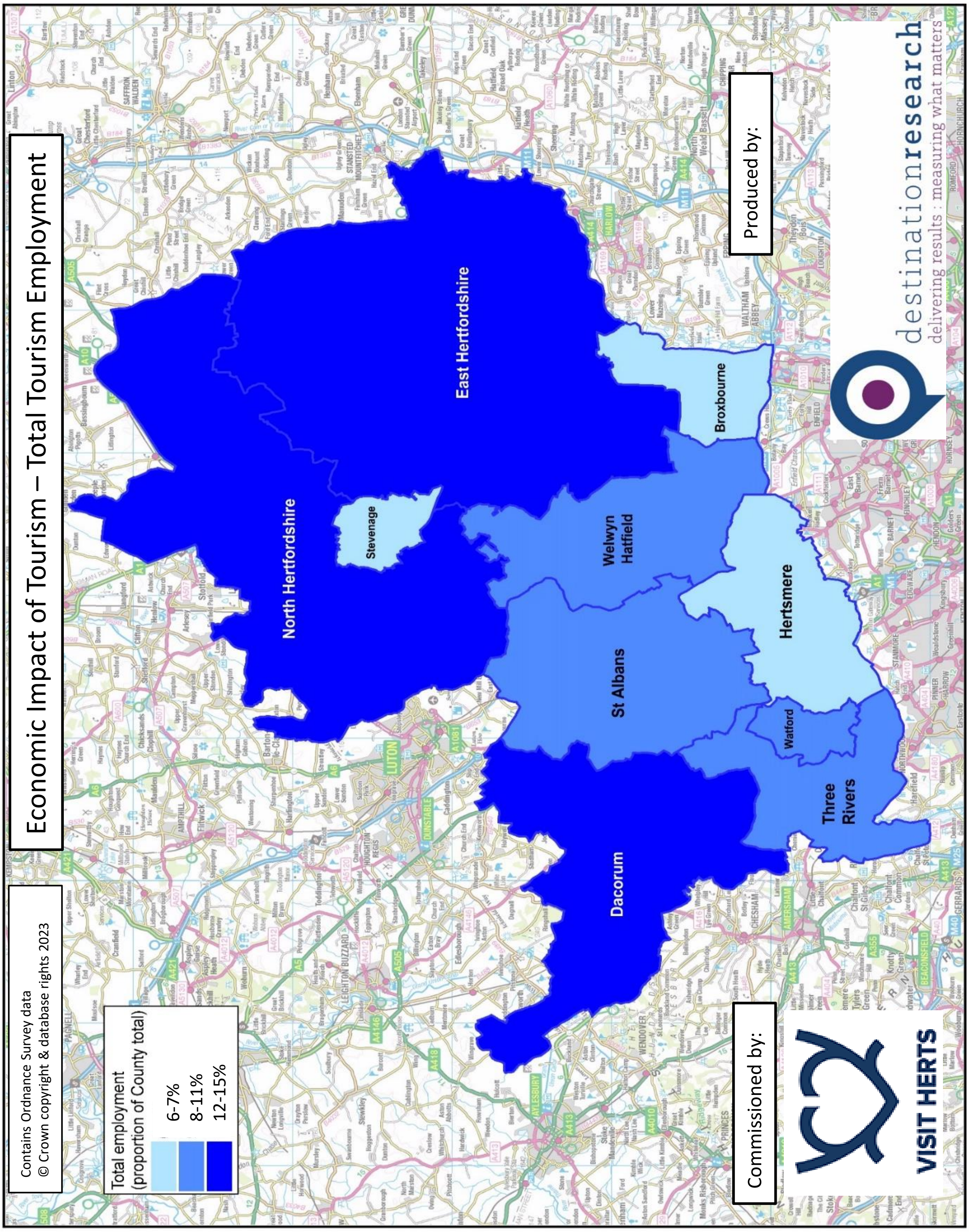
Thematic maps - Total Volume of Trips



Thematic maps - Total Tourism Value



Thematic maps - Total Tourism Employment



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 change 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;
- Latest estimates of resident population as based on the Census of Population;
- Selected data from the Census of Employment;

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 residents in the locality. The report excludes trips undertaken for business or study purposes. This report presents data on those who took trips of at least 3 hours duration on an irregular basis as defined by the GBDVS. These are identified as tourism day trips by the Department for Digital, Culture, Media and Sport.

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 county.

The GBTS, IPS and Day Visits to Great Britain surveys provide 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.

Local level data for Hertfordshire EIA Reports 2022
The Cambridge Model allows for the use of local visitor related data. Local data from visitor surveys and other sources is not always sufficiently detailed or available regularly enough to make the results consistent. We have included the following locally sourced data, provided by partners: Serviced accommodation occupancy (STR) and self-catering accommodation stats (AirDNA) for 2022 and St Albans town centre footfall reports.

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