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Economic Impact of Tourism

Hertfordshire - 2021 Results

January 2023

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Introduction

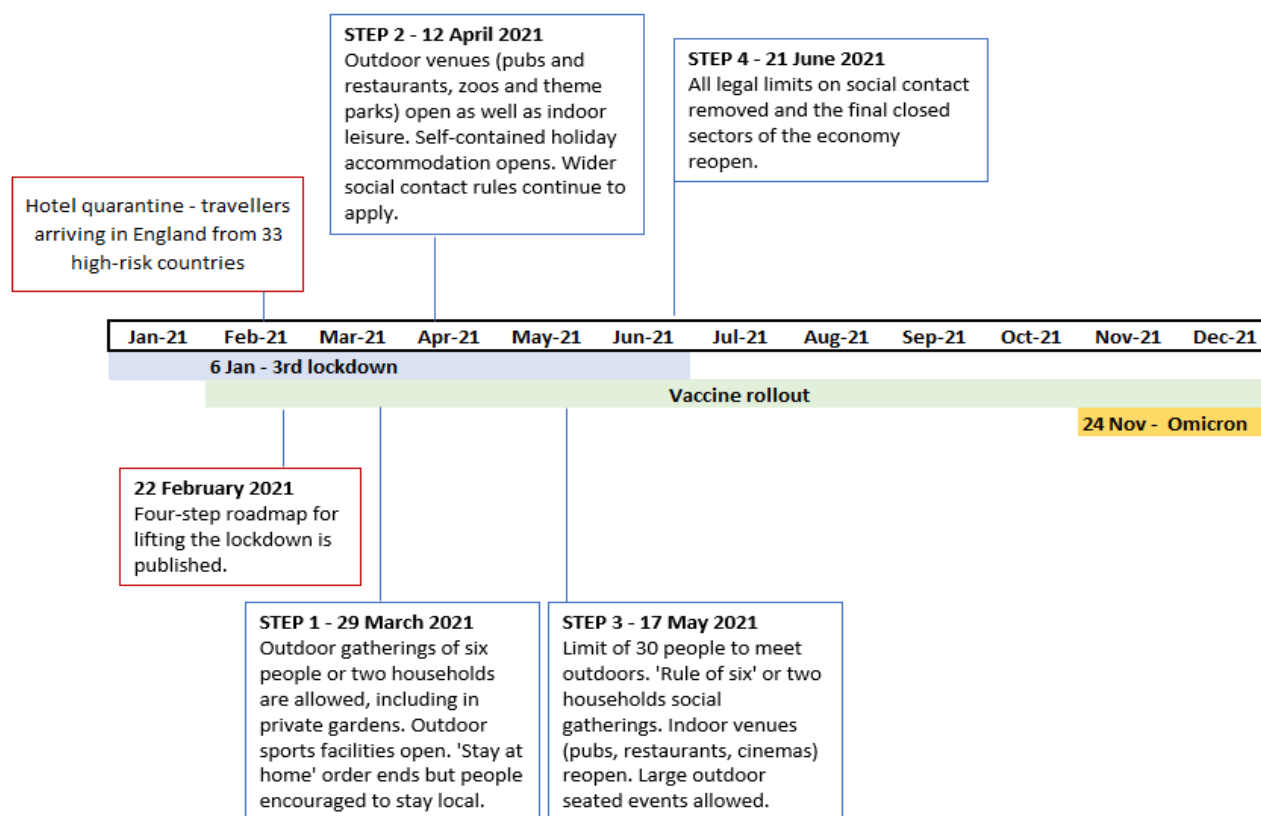
This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2021 and provides comparative data against the previously published data for 2020 as well as providing headline comparisons against 2019 in order to monitor the ongoing impact of the pandemic.

Destination Research was commissioned by Visit Herts to produce 2021 results based on the latest data from national tourism surveys and regionally/locally based data. The results are derived using the Cambridge Economic Impact Model.

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.

Summary of national lockdown laws during 2021

Our analysis assumes an initial lockdown starting in January, followed by a four-step roadmap for a gradual lifting of movement and travel restrictions.



Cambridge Model 2021 results – Key methodology changes

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

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

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

The ongoing Covid-19 pandemic has caused global disruption to the visitor economy with activity re-starting at a slow pace. There is a consensus that tourism recovery will be segmented and gradual. In order to reflect the impact of the pandemic, the 2021 results incorporate the following methodological changes:

- Results for the three key surveys (GBTS, IPS and GBDVS) were suspended in March 2020 because of the coronavirus (Covid-19) pandemic.
- Fieldwork for the GBTS and GBDVS resumed in April 2021 and national-level 2021 data (April – December) was published during the last quarter of 2022.
- During 2021, the IPS survey restarted at the majority of ports but did not operate at Dover until Q3 and there were no interviews on the Eurotunnel through the entirety of 2021 due to COVID-19 restrictions. Therefore, the published data does not represent the total inbound market for 2021 and is not directly comparable with historical UK total data.
- Therefore, the full 2021 results presented in this report are based on a range of administrative sources, consumer travel insights published by national agencies and modelling work, using the published 2019 Cambridge Model data as a starting point.
- Domestic tourism estimates produced by VisitBritain for each of the four journey purposes for domestic overnight tourism (holidays, business, visiting friends and relatives and miscellaneous journeys), 17 categories of spending for leisure day trips.
- Whenever available, we have included locally sourced data supplied by destinations in our calculations, including (but not limited to) local business performance (e.g. accommodation occupancy), car parking data, annual footfall and visits to visitor attractions.

SEASONALITY: The figures assume a step change in mid-May as restrictions eased, followed by a continued recovery in the summer and autumn. Towards the end of the year there was a dip from late November, intensifying in December, due to the Omicron variant.

TRIPS AND WEIGHTING FACTORS: Our model uses a set of weighting factors to reflect the fact that different journey purposes and trip types recovered at different rates, and there were different patterns of recovery by type of destination. Holidays and trips to friends and family performed above 2019 and 2020 levels whereas business-related visits continued to fall.

Furthermore, urban and coastal resort areas attracted proportionately higher levels of expenditure from day trippers due to the shopping opportunities, whereas countryside, villages and rural coastal areas experienced a proportionately stronger overnight visitor market, due to the availability of self-catering accommodation and the wider offer of socially distanced holidays.

EMPLOYMENT:

The Government's Job Retention Scheme, known as furlough was first launched in April 2020 and lasted until 30 September 2021. Initially, employees continued to receive 80% of current salary for hours not worked, capped at £2,500 per month. From 1 July 2021, the Government paid 70% of wages up to a maximum cap of £2,187.50 for the hours the employee was on furlough. Employers had to top up employees' wages so that they received 80% of their wages (up to £2,500) for the hours they were on furlough. From 1 August 2021, the Government paid 60% of wages up to a maximum cap of £1,875 for the hours the employee was on furlough.

As Coronavirus restrictions came to an end, industries in the UK experienced the effects of the pandemic in different ways. Employment fell in the accommodation and food sectors. Data from the Office for National Statistics (ONS) shows that from October to December 2021, employment in the accommodation and food sector was still 11% below pre-pandemic levels.

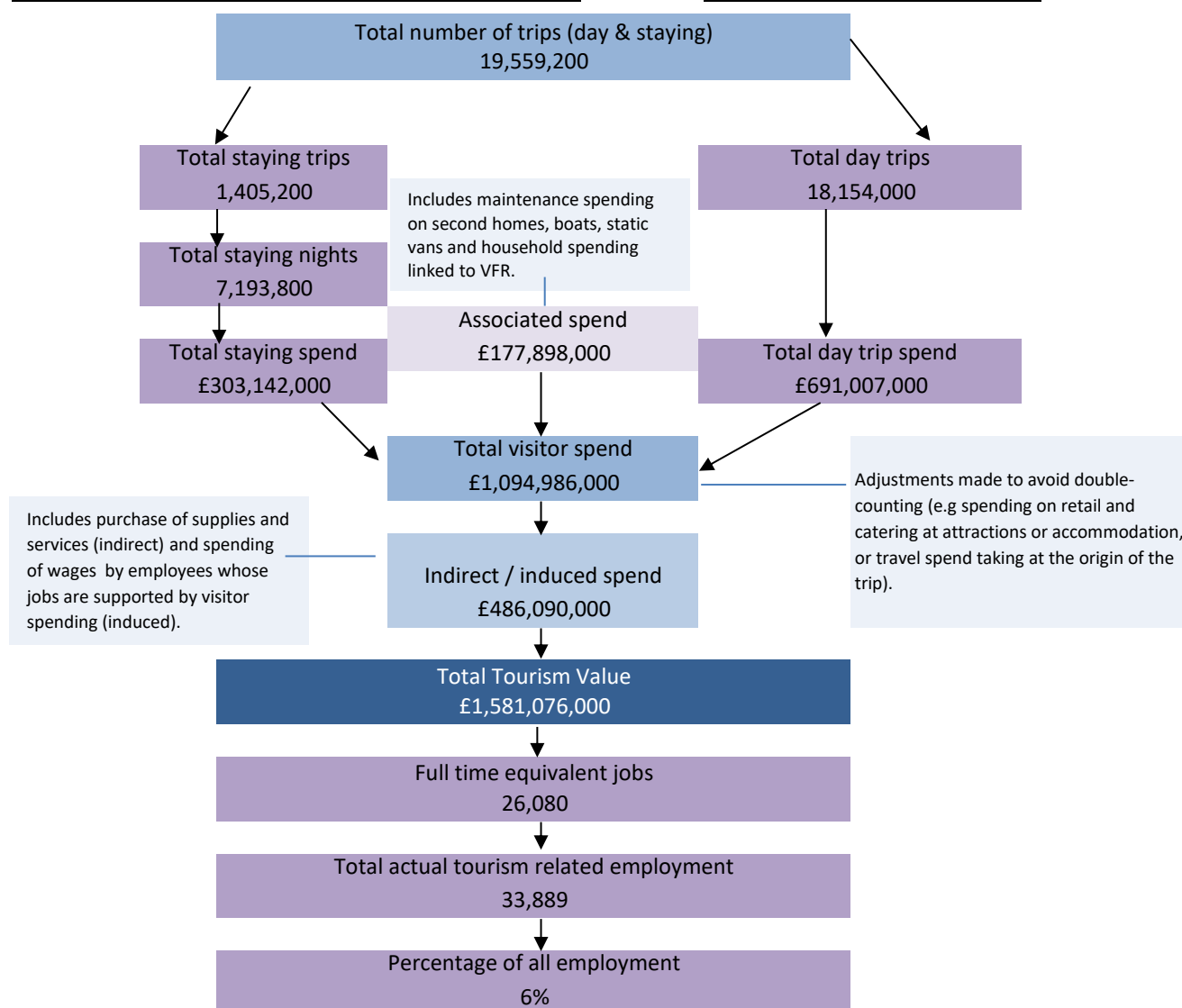
2021 National forecast

As was the case with the 2020 results, the model will make use of the latest forecast from VisitBritain, relating to 2021. This assumes an estimated £16.0bn in domestic overnight tourism spending (64% growth on 2020 and 65% of the 2019 level) and £41.0bn in leisure day trip spending (69% growth on 2020 and 61% of the 2019 level).

Inbound tourism for the full year 2021 is estimated at 6.4 million visits, 42% down on 2020 and 16% of the 2019 level (or 84% down on 2019). Expenditure by inbound visitors reached £5.6bn, 10% down on 2020 and 20% of the 2019 level (or 80% down on 2019).

Economic Impact of Tourism – Headline Figures

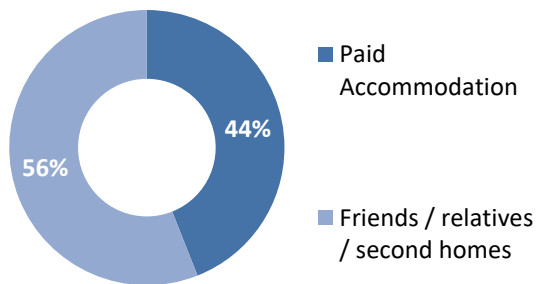
Hertfordshire - 2021 Results



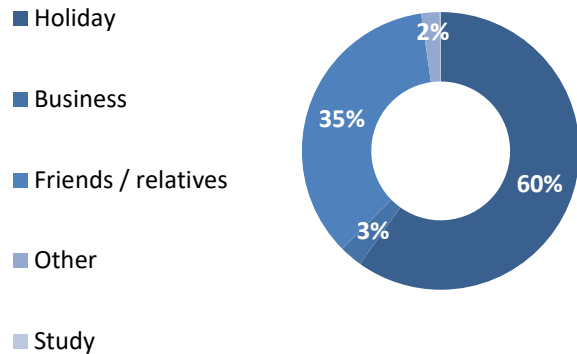
Economic Impact of Tourism – Year on year comparisons

				Year-on-year comparison	Pre-pandemic levels
	2021	2020	2019	2021 v 2020	2021 v 2019
Day Trips					
Day trips Volume	18,154,000	13,023,000	27,072,000	39%	-33%
Day trips Value	£691,007,000	£479,371,000	£1,049,479,000	44%	-34%
Overnight trips					
Number of trips	1,405,200	971,700	1,923,000	45%	-27%
Number of nights	7,193,800	5,293,000	10,241,000	36%	-30%
Trip value	£303,142,000	£200,154,000	£499,203,000	51%	-39%
Total Value	£1,581,076,000	£1,137,610,000	£2,427,434,000	39%	-35%
Actual Jobs	33,889	30,389	43,390	12%	-22%
	2021	2020	2019	2021 v 2020	2021 v 2019
Average length stay (nights x trip)	5.12	5.45	5.33	-6.0%	-3.9%
Spend x overnight trip	£ 215.73	£ 205.92	259.60	4.8%	-16.9%
Spend x night	£ 42.14	£ 37.81	48.75	11.4%	-13.6%
Spend x day trip	£ 38.06	£ 36.81	38.77	3.4%	-1.8%

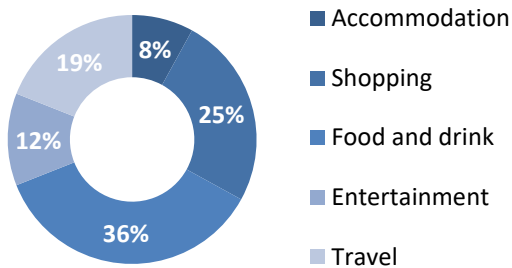
Trips by type of accommodation



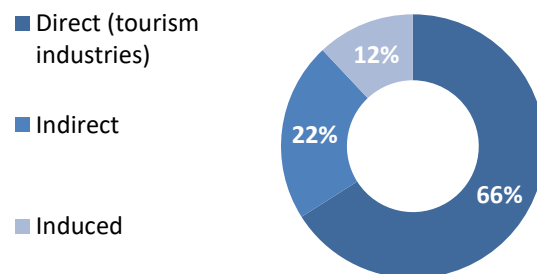
Trips by Purpose



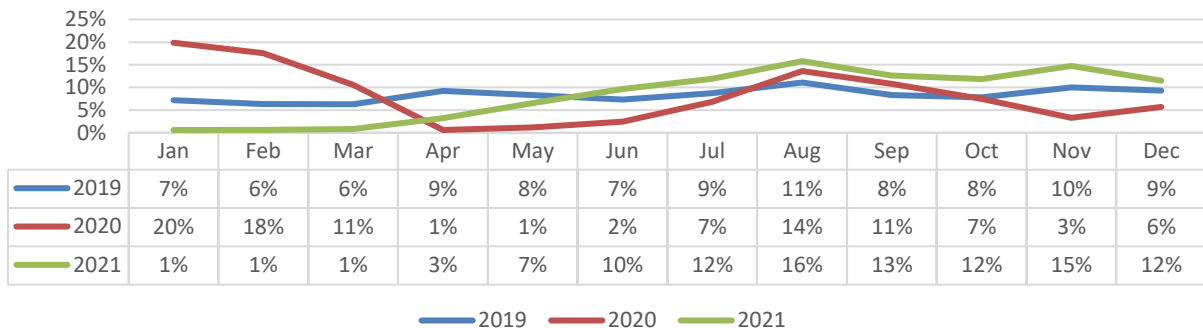
Breakdown of expenditure



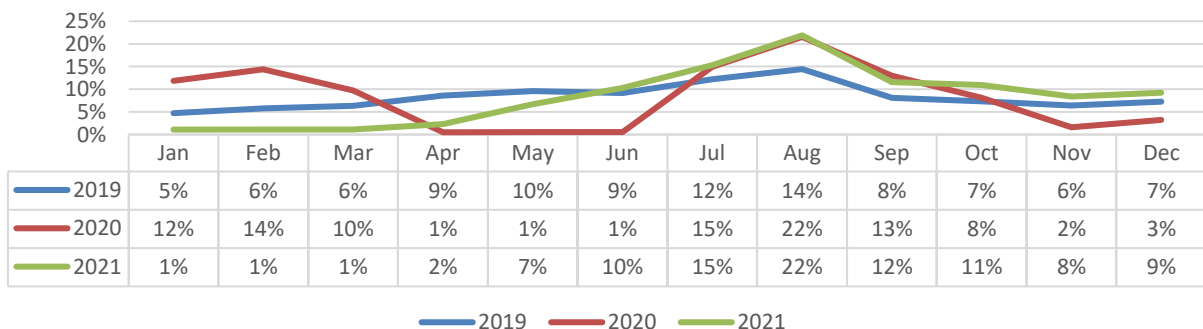
Type of employment



Seasonality - Day trip expenditure



Seasonality - Overnight expenditure



Source: VisitBritain

Volume of Tourism

Staying visits in the county context

Hertfordshire - 2021 Results

Staying trips in the county context

District	Domestic trips ('000)	Overseas trips ('000)
North Herts	126	13
Stevenage	100	9
East Herts	180	18
Broxbourne	88	10
Welwyn Hatfield	121	14
St Albans	189	18
Dacorum	182	16
Three Rivers	59	10
Watford	130	10
Hertsmere	102	11
Hertfordshire	1,277	128

Staying nights in the county context

District	Domestic nights ('000)	Overseas nights ('000)
North Herts	624	95
Stevenage	449	53
East Herts	911	170
Broxbourne	478	69
Welwyn Hatfield	603	179
St Albans	854	134
Dacorum	851	119
Three Rivers	355	63
Watford	551	68
Hertsmere	492	77
Hertfordshire	6,168	1,026

Expenditure in the county context

District	Domestic spend (millions)	Overseas spend (millions)
North Herts	£24.4	£3.8
Stevenage	£20.1	£2.1
East Herts	£36.4	£7.3
Broxbourne	£16.7	£2.8
Welwyn Hatfield	£26.2	£8.0
St Albans	£38.4	£5.5
Dacorum	£40.1	£5.0
Three Rivers	£11.1	£2.4
Watford	£26.7	£2.8
Hertsmere	£20.2	£3.1
Hertfordshire	£260.3	£42.8

Staying Visitors - Accommodation Type

Hertfordshire - 2021 Results

Trips by Accommodation

	UK		Overseas		Total	
Serviced	485,000	38%	500	0%	485,500	35%
Self catering	14,000	1%	2,400	2%	16,400	1%
Camping	18,000	2%	1,200	1%	19,200	1%
Static caravans	0	0%	0	0%	0	0%
Group/campus	10,000	1%	1,000	1%	11,000	1%
Paying guest	0	0%	2,800	2%	2,800	0%
Second homes	4,000	0%	1,100	1%	5,100	1%
Boat moorings	17,000	1%	0	0%	17,000	1%
Other	61,000	5%	14,300	11%	75,300	5%
Friends & relatives	668,000	52%	104,900	82%	772,900	55%
Total	2021	1,277,000	128,200		1,405,200	
Comparison	2020	815,000	157,000		972,000	
Difference		57%	-18%		45%	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	1,291,000	21%	2,200	0%	1,293,200	18%
Self catering	52,000	1%	30,900	3%	82,900	1%
Camping	169,000	3%	6,900	1%	175,900	2%
Static caravans	0	0%	0	0%	0	0%
Group/campus	40,000	1%	37,000	4%	77,000	1%
Paying guest	0	0%	28,200	3%	28,200	1%
Second homes	19,000	0%	55,200	5%	74,200	1%
Boat moorings	74,000	1%	0	0%	74,000	1%
Other	350,000	5%	15,900	2%	365,900	5%
Friends & relatives	4,173,000	68%	849,500	82%	5,022,500	70%
Total	2021	6,168,000	1,025,800		7,193,800	
Comparison	2020	3,895,000	1,398,000		5,293,000	
Difference		58%	-27%		36%	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£106,682,000	41%	£498,000	1%	£107,180,000	35%
Self catering	£4,643,000	2%	£1,733,000	4%	£6,376,000	2%
Camping	£2,991,000	1%	£183,000	0%	£3,174,000	1%
Static caravans	£0	0%	£0	0%	£0	0%
Group/campus	£3,528,000	1%	£1,684,000	4%	£5,212,000	2%
Paying guest	£0	0%	£1,167,000	3%	£1,167,000	0%
Second homes	£1,039,000	1%	£1,418,000	3%	£2,457,000	1%
Boat moorings	£3,606,000	1%	£0	0%	£3,606,000	1%
Other	£15,615,000	6%	£1,585,000	4%	£17,200,000	6%
Friends & relatives	£122,240,000	47%	£34,530,000	81%	£156,770,000	52%
Total	2021	£260,344,000	£42,798,000		£303,142,000	
Comparison	2020	£142,046,000	£58,108,000		£200,154,000	
Difference		83%	-26%		51%	

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 - 2021 Results

Trips by Purpose

	UK		Overseas		Total	
Holiday	817,000	64%	22,100	17%	839,100	60%
Business	38,000	3%	100	0%	38,100	3%
Friends & relatives	396,000	31%	101,800	80%	497,800	35%
Other	26,000	2%	2,700	2%	28,700	2%
Study	0	0%	1,500	1%	1,500	0%
Total 2021	1,277,000		128,200		1,405,200	
Comparison 2020	815,000		157,000		972,000	
Difference	57%		-18%		45%	

Nights by Purpose

	UK		Overseas		Total	
Holiday	4,010,000	65%	109,300	11%	4,119,300	57%
Business	123,000	2%	700	0%	123,700	2%
Friends & relatives	1,912,000	31%	832,900	81%	2,744,900	38%
Other	123,000	2%	50,200	5%	173,200	2%
Study	0	0%	32,700	3%	32,700	1%
Total 2021	6,168,000		1,025,800		7,193,800	
Comparison 2020	3,895,000		1,398,000		5,293,000	
Difference	58%		-27%		36%	

Spend by Purpose

	UK		Overseas		Total	
Holiday	£137,982,000	53%	£8,398,900	20%	£146,380,900	48%
Business	£10,414,000	4%	£81,000	0%	£10,495,000	4%
Friends & relatives	£106,741,000	41%	£30,405,700	71%	£137,146,700	45%
Other	£5,207,000	2%	£2,490,700	6%	£7,697,700	3%
Study	£0	0%	£1,421,700	3%	£1,421,700	0%
Total 2021	£260,344,000		£42,798,000		£303,142,000	
Comparison 2020	£142,046,000		£58,108,000		£200,154,000	
Difference	83%		-26%		51%	

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)	
USA	46.9	USA	£20.25
Germany	45.3	Germany	£17.57
Irish Republic	44.8	Spain	£15.34
Spain	41.1	France	£11.07
France	34.9	India	£10.93
Netherlands	21.7	Australia	£9.90
Australia	20.9	Irish Republic	£9.02
Poland	19.6	Romania	£7.41
Romania	17.6	Canada	£6.22
Italy	15.4	Italy	£5.16

Source: International Passenger Survey, 2017-2019

Domestic Overnight Visitors - Purpose of Trip

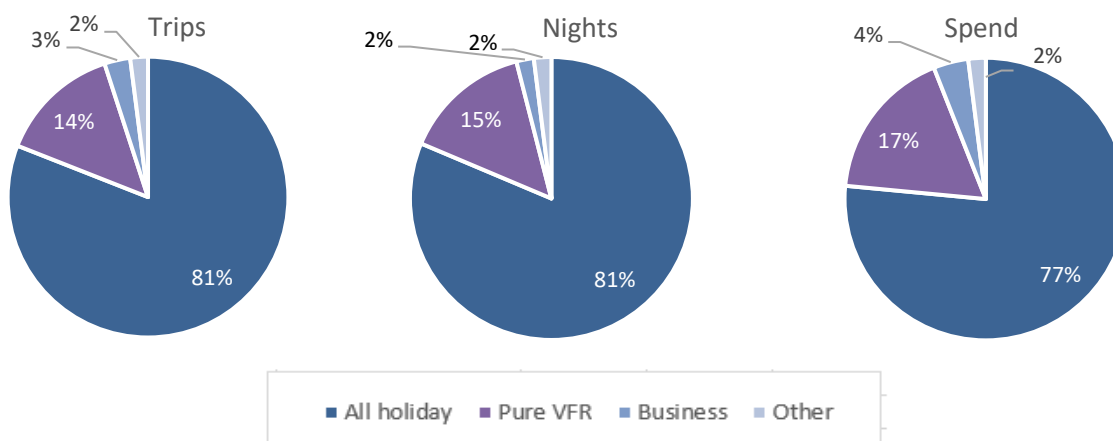
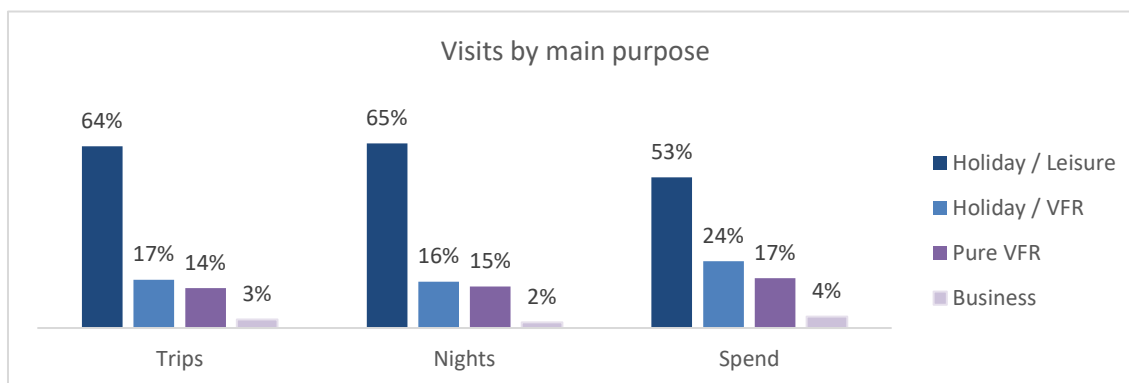
Hertfordshire - 2021 Results

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	817,000	64%	4,010,000	65%	£137,982,000	53%
Holiday / VFR	217,000	17%	1,008,000	16%	£61,198,000	24%
Pure VFR	179,000	14%	904,000	15%	£45,543,000	17%
Business	38,000	3%	123,000	2%	£10,414,000	4%
Other	26,000	2%	123,000	2%	£5,207,000	2%
Total	1,277,000		6,168,000		£260,344,000	

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	5.1	3.2
Spend x overnight trip	£168.89	£282.02	£254.43	£274.05
Spend x night	£34.41	£60.71	£50.38	£84.67



Day Visitors

Hertfordshire - 2021 Results

Total Volume and Value of Day Trips

		Trips	Spend
Urban visits		12,769,000	£577,752,000
Countryside visits		5,385,000	£113,255,000
Total	2021	18,154,000	£691,007,000
Comparison	2020	13,023,000	£479,371,000
Difference		39%	44%

Day Visitors in the county context

District	Day Visits (millions)	Day visit Spend (millions)
North Herts	2.3	£85.1
Stevenage	1.3	£47.0
East Herts	3.3	£123.3
Broxbourne	1.0	£37.4
Welwyn Hatfield	1.5	£69.1
St Albans	1.5	£56.4
Dacorum	2.6	£98.0
Three Rivers	2.1	£87.6
Watford	1.4	£50.9
Hertsmere	1.1	£36.2
Hertfordshire	18.2	£691.0

Value of Tourism

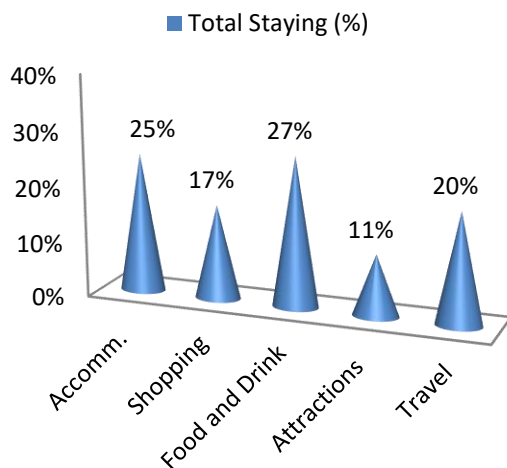
Expenditure Associated with Trips

Hertfordshire - 2021 Results

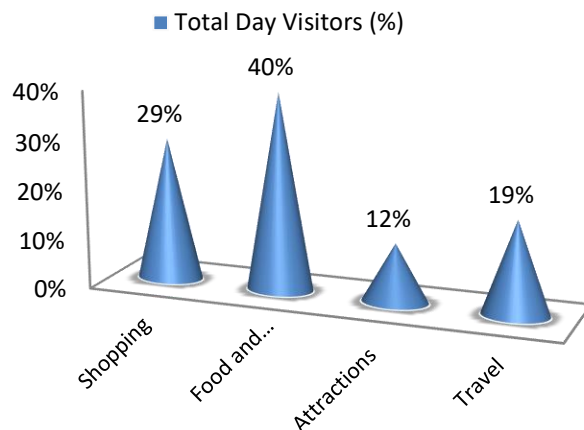
Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£67,689,400	£39,051,600	£70,292,900	£28,637,800	£54,672,300	£260,344,000
Overseas tourists	£8,559,600	£13,267,400	£11,127,500	£5,135,800	£4,707,700	£42,798,000
Total Staying	£76,249,000	£52,319,000	£81,420,400	£33,773,600	£59,380,000	£303,142,000
Total Staying (%)	25%	17%	27%	11%	20%	100%
Total Day Visitors	£0	£200,392,000	£276,402,800	£82,920,800	£131,291,400	£691,007,000
Total Day Visitors (%)	0%	29%	40%	12%	19%	100%
Total 2021	£76,249,000	£252,711,000	£357,823,200	£116,694,400	£190,671,400	£994,149,000
%	8%	25%	36%	12%	19%	100%
Comparison 2020	£43,799,000	£222,386,000	£242,064,000	£70,832,000	£100,443,000	£679,524,000
Difference	74%	14%	48%	65%	90%	46%

Breakdown of expenditure



Breakdown of expenditure



Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	Boats	Static vans	Friends & relatives	Total
£1,388,000	£551,000	£0	£175,959,000	£177,898,000

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

Hertfordshire - 2021 Results

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		£77,276,000	£5,551,000	£82,827,000
Retail		£51,979,000	£194,362,000	£246,341,000
Catering		£78,657,000	£269,138,000	£347,795,000
Attractions		£34,494,000	£90,037,000	£124,531,000
Transport		£36,443,000	£79,151,000	£115,594,000
Non-trip spend		£177,898,000	£0	£177,898,000
Total Direct	2021	£456,747,000	£638,239,000	£1,094,986,000
Comparison	2020	£322,800,000	£454,867,000	£777,667,000
Difference		41%	40%	41%

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		£85,285,000	£179,132,000	£264,417,000
Non trip spending		£44,652,000	£0	£44,652,000
Income induced		£123,132,000	£53,889,000	£177,021,000
Total	2021	£253,069,000	£233,021,000	£486,090,000
Comparison	2020	£191,524,000	£168,419,000	£359,943,000
Difference		32%	38%	35%

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		£456,747,000	£638,239,000	£1,094,986,000
Indirect		£253,069,000	£233,021,000	£486,090,000
Total Value	2021	£709,816,000	£871,260,000	£1,581,076,000
Comparison	2020	£514,324,000	£623,286,000	£1,137,610,000
Difference		38%	40%	39%

Employment

Employment

Hertfordshire - 2021 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 £48,600 increase in tourism revenue.

Direct employment

Full time equivalent (FTE)						
	Staying Visitors		Day Visitor		Total	
Accommodation	1,177	16%	99	1%	1,276	8%
Retailing	466	6%	1,721	20%	2,187	13%
Catering	1,275	17%	4,523	53%	5,798	36%
Entertainment	636	9%	1,741	20%	2,377	15%
Transport	246	3%	532	6%	778	5%
Non-trip spend	3,661	49%	0	0%	3,661	23%
Total FTE	2021	7,461	8,616		16,077	
Comparison	2020	6,773	8,062		14,836	
Difference		10%	7%		8%	
Estimated actual jobs						
	Staying Visitors		Day Visitor		Total	
Accommodation	1,742	18%	146	1%	1,888	8%
Retailing	698	7%	2,582	20%	3,280	14%
Catering	1,913	19%	6,784	53%	8,697	39%
Entertainment	897	9%	2,455	20%	3,352	15%
Transport	347	4%	750	6%	1,097	5%
Non-trip spend	4,173	43%	0	0%	4,173	19%
Total Actual	2021	9,770	12,717		22,487	
Comparison	2020	8,912	11,934		20,846	
Difference		10%	7%		8%	

Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	2,674	3,686	6,360
Induced jobs	2,534	1,109	3,643
Total FTE	2021	5,208	4,795
Comparison	2020	4,454	3,917
Difference		17%	22%
			19%
Estimated actual jobs			
	Staying Visitors	Day Visitors	Total
Indirect jobs	3,048	4,202	7,250
Induced jobs	2,888	1,264	4,152
Total Actual	2021	5,936	5,466
Comparison	2020	5,078	4,465
Difference		17%	22%
			19%

Total Tourism Jobs

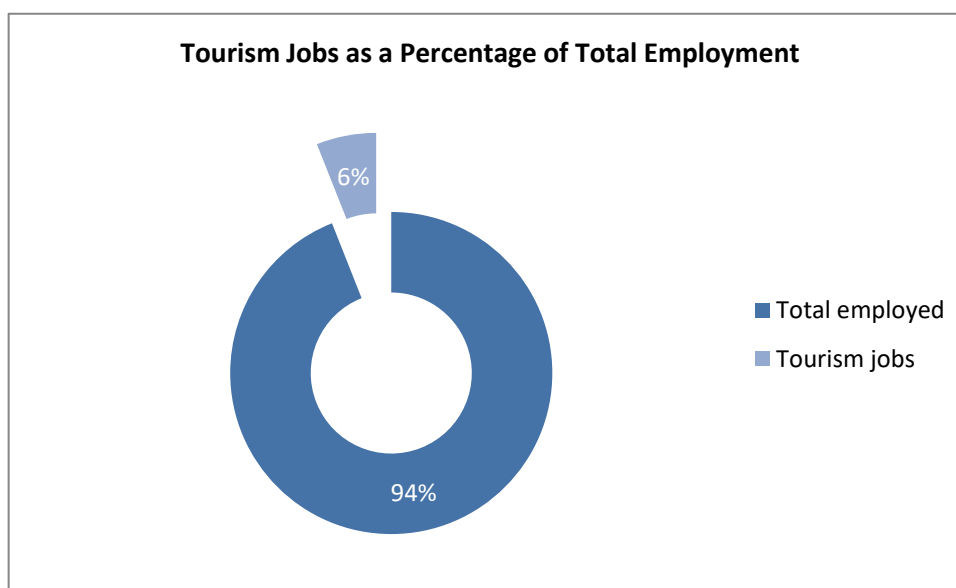
Hertfordshire - 2021 Results

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	7,461	59%	8,616	64%	16,077	62%
Indirect	2,674	21%	3,686	28%	6,360	24%
Induced	2,534	20%	1,109	8%	3,643	14%
Total FTE 2021	12,669		13,411		26,080	
Comparison 2020	11,227		11,979		23,206	
Difference	13%		12%		12%	
Estimated actual jobs						
	Staying Visitors		Day Visitor		Total	
Direct	9,770	62%	12,717	70%	22,487	66%
Indirect	3,048	20%	4,202	23%	7,250	22%
Induced	2,888	18%	1,264	7%	4,152	12%
Total Actual 2021	15,706		18,183		33,889	
Comparison 2020	13,990		16,399		30,389	
Difference	12%		11%		12%	

Tourism Jobs as a Percentage of Total Employment

	Staying Visitors	Day visitors	Total
Total employed	607,125	607,125	607,125
Tourism jobs	15,706	18,183	33,889
Proportion all jobs	3%	3%	6%
Comparison 2020	13,990	16,399	30,389
Difference	12%	11%	12%



The key 2021 results of the Economic Impact Assessment are:

19.6 million trips were undertaken in the area

18.2 million day trips

1.4 million overnight visits

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

£1,095 million spent by tourists during their visit to the area

£91 million spent on average in the local economy each month.

£303 million generated by overnight visits

£691 million generated from day trips.

£1,581 million spent in the local area as result of tourism, taking into account multiplier effects.

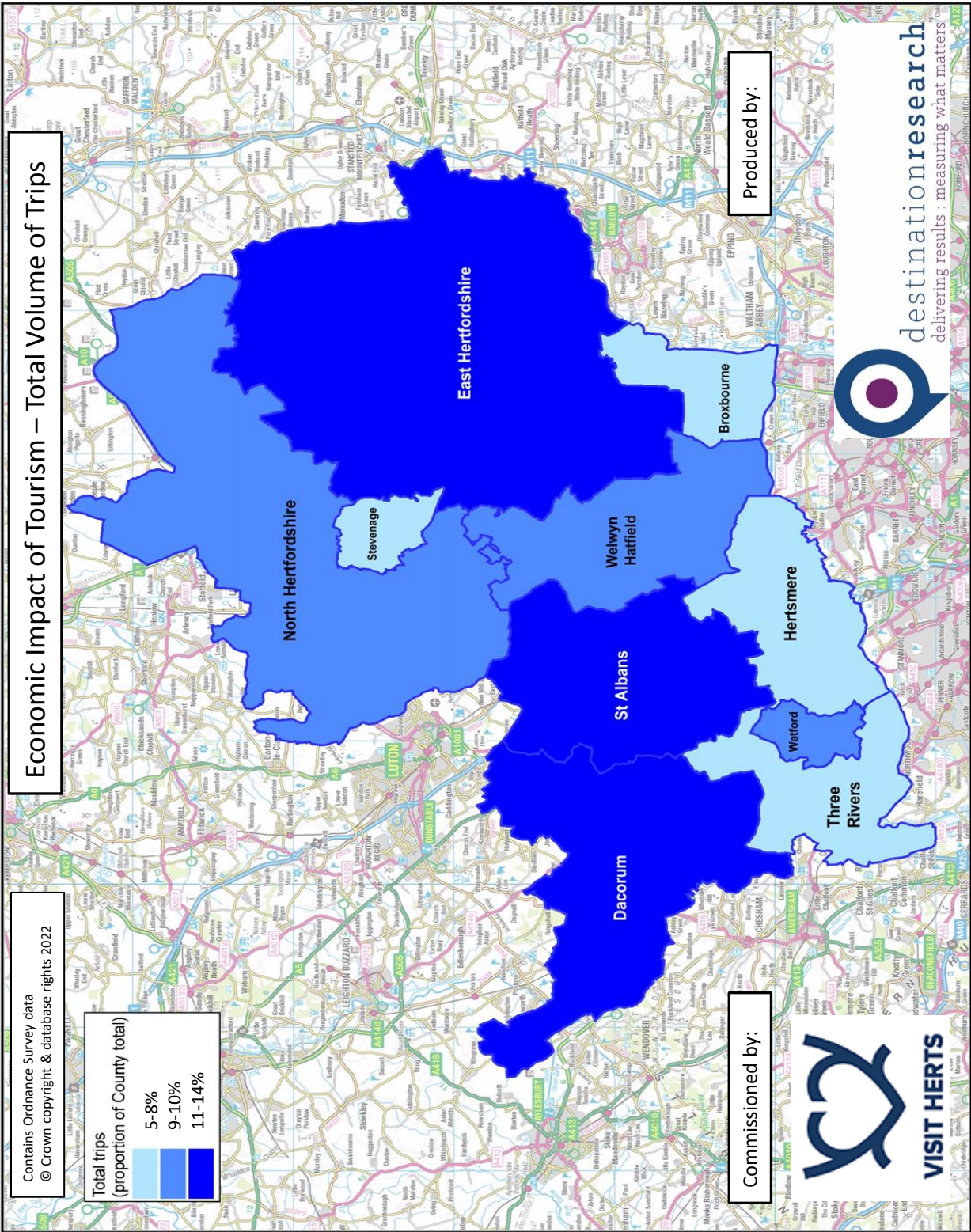
33,889 jobs supported, both for local residents from those living nearby.

22,487 tourism jobs directly supported

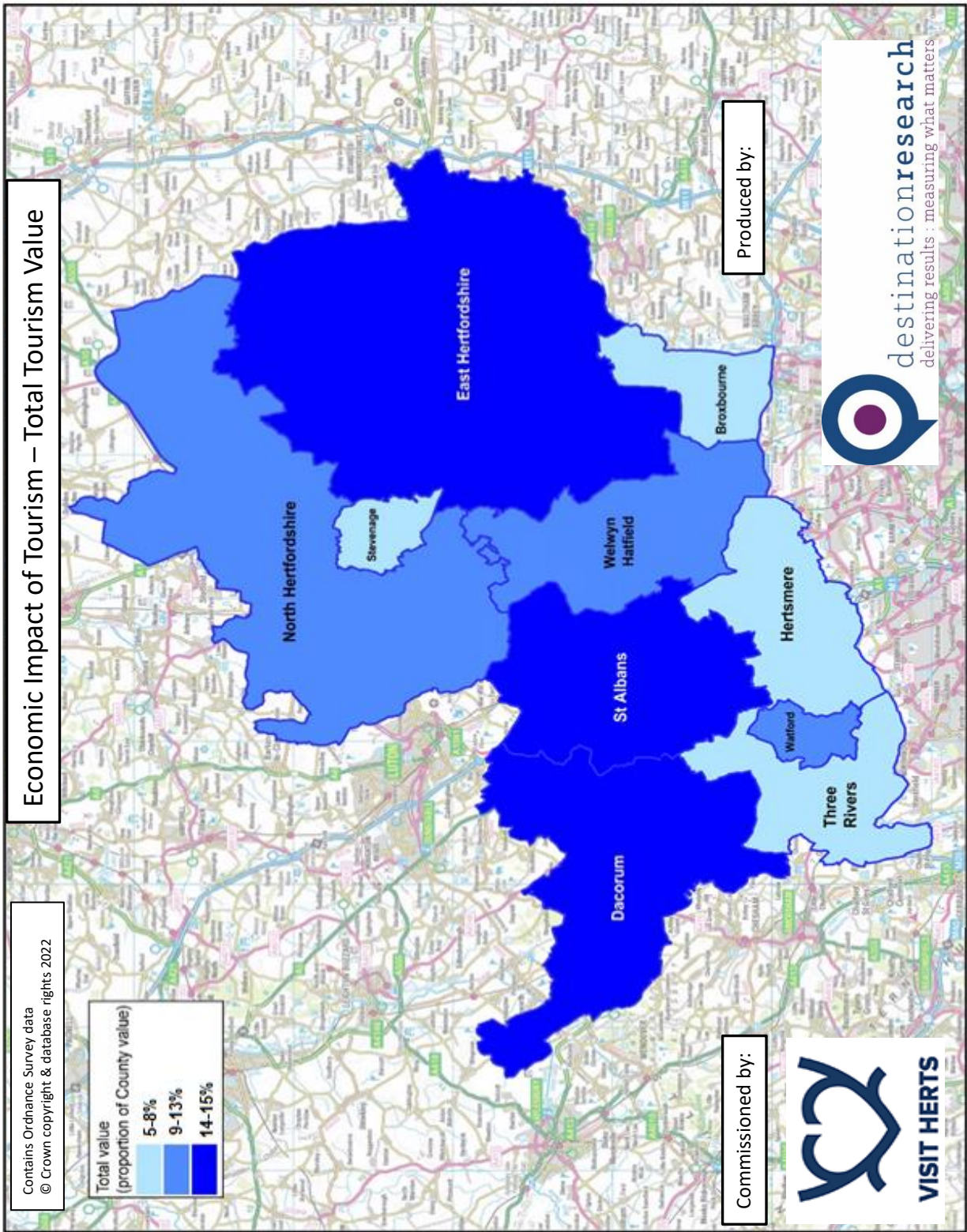
11,402 non-tourism related jobs supported linked to multiplier spend from tourism.

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

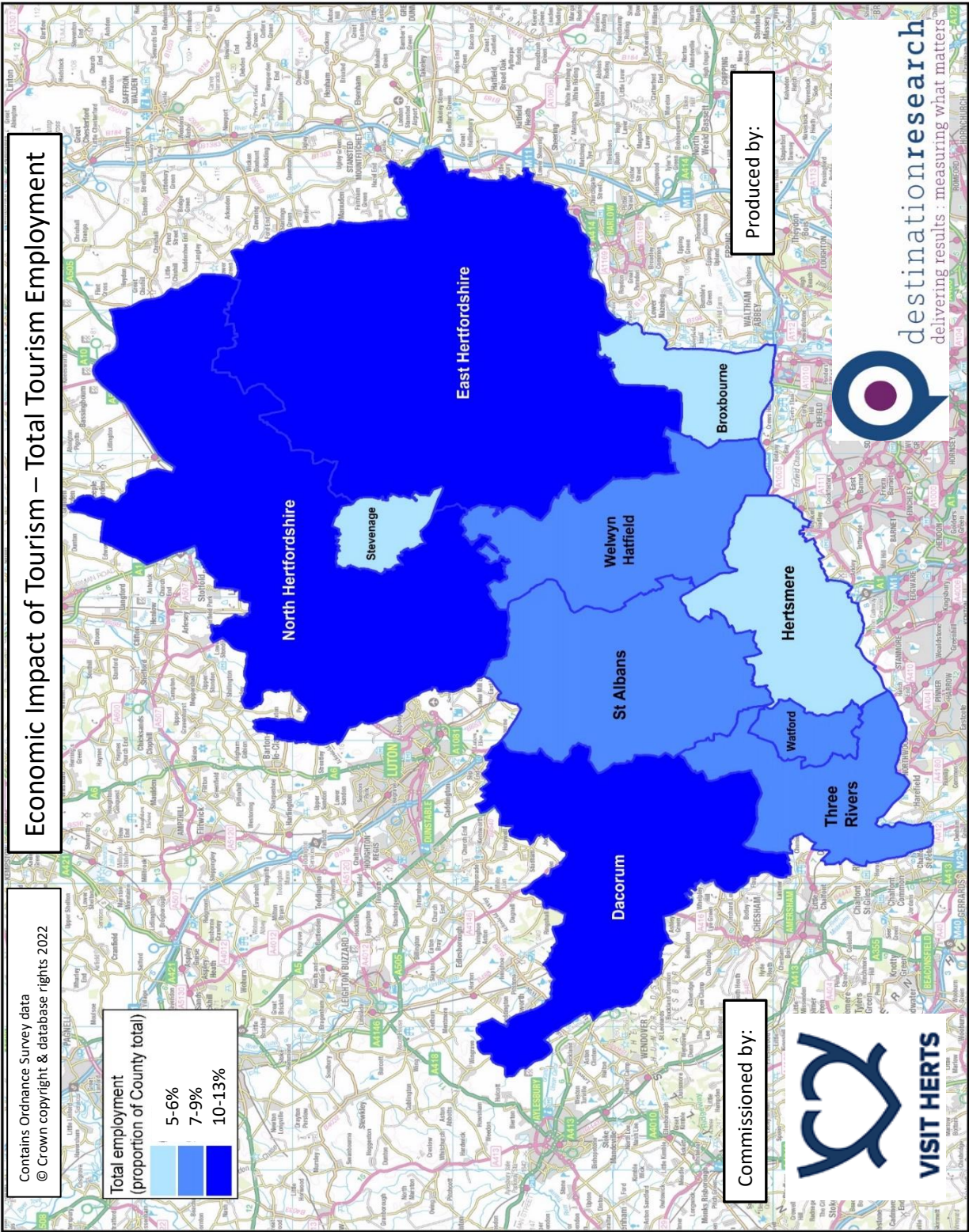
Thematic maps - Total Volume of Trips



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 2011 Census of Population;
- Selected data from the 2011 Census of Employment;
- Selected data on the countryside including national designations.

Staying Visitors

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

Day Visitors

Information on day trips at the regional level is available from the Day Visits in Great Britain survey. The survey includes all leisure-related trips from home. It should be noted that a large proportion are local trips made by people resident in the locality. The 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 survey data on the breakdown of visitor spending. The impact of this initial round of expenditure will be subsequently increased by multiplier effects. These arise from the purchase of supplies and services by the businesses in receipt of visitor expenditure (indirect impacts), and by the income induced-effects arising from the spending of wages by employees in the first round of business and in subsequent expenditure in supplier business (induced impacts).

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

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

Number of full time job equivalents

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

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

Number of Actual Jobs

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

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

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

Local level data for Hertfordshire EIA Reports 2021

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:

Hertfordshire

- Attraction footfall data from the 2021 Business Barometer
- Serviced accommodation occupancy (STR) and self-catering accommodation stats (AirDNA) for 2021
- Herts Visitor Insights - CRF visitor research.

St Albans City & District Council

- Footfall data for our Council owned attractions / venues for the calendar year 2021
- St Albans town centre footfall reports
- Footfall for two key events in 2021- St Albans Festival and Christmas Cracker
- Usage figure related to the St Albans Leisure and Arts sites.

Broxbourne Borough Council

- Footfall figures for Brookfield, Cheshunt, Hoddesdon and Waltham Cross.

Visit Watford

- Footfall and parking data split in two categories: Watford town centre and Watford Borough excluding town centre.

Dacorum

- Footfall data for Hemel, Berkhamsted and Tring
- Attractions openings and closures

Hertsmere Borough Council

- Footfall data for Borehamwood, Bushey Heath, Potters Bar and Radlett.

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