destinationresearch
delivering results : measuring what matters

Commissioned by:

Visit Herts

VISIT HERTS

Economic Impact of Tourism

St Albans - 2021 Results

January 2023

Contents	Page

Introduction

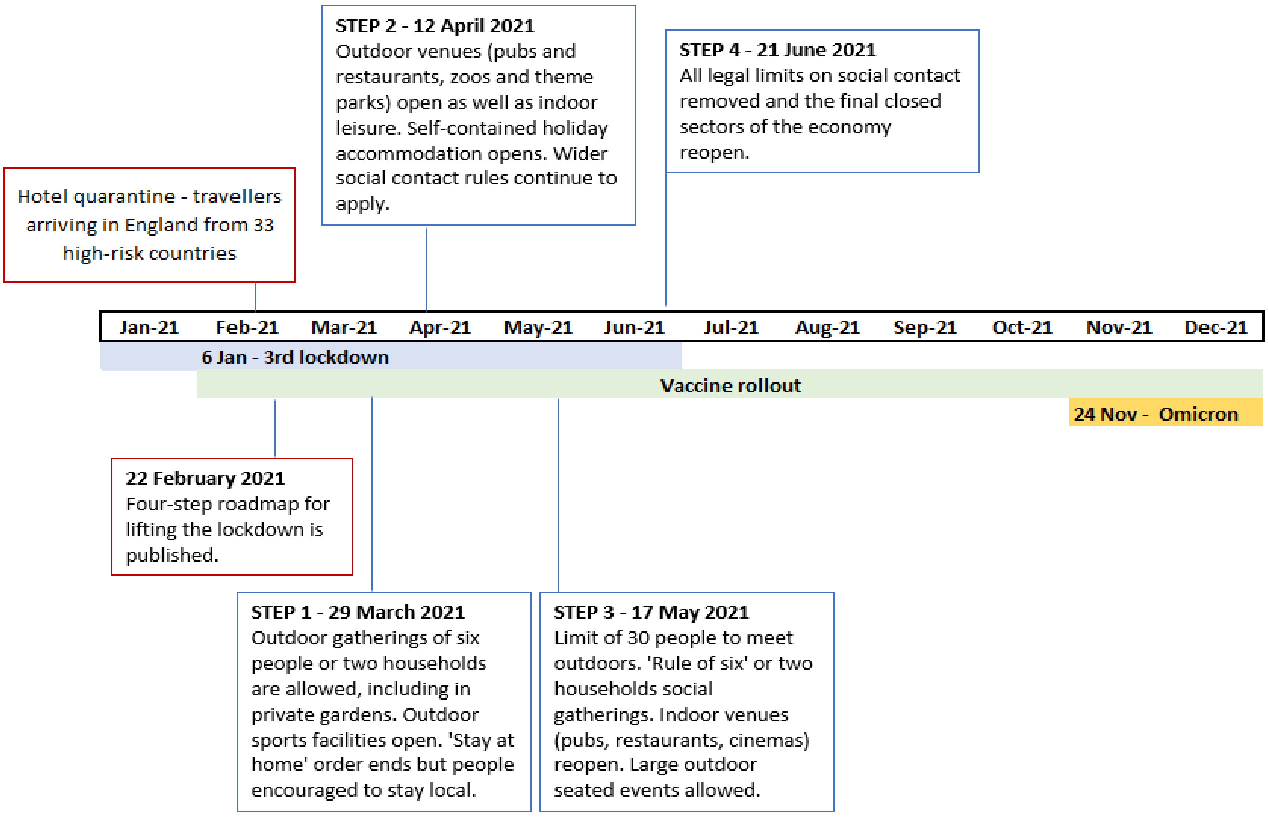
This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2021 and provides comparative data against the previously published data for 2020 as well as providing headline comparisons against 2019 in order to monitor the ongoing impact of the pandemic.

Destination Research was commissioned by Visit Herts 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 at 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 St Albans - 2021 Results

Total number of trips (day & staying)
1,703,000

Total staying trips
207,000

Total staying nights
988,000

Total staying spend
£43,887,000

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

Associated spend
£15,883,000

Total day trips
1,496,000

Total day trip spend
£56,392,000

Total visitor spend
£108,398,000

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
£41,608,000

Total Tourism Value
£150,006,000

Full time equivalent jobs
2,358

Total actual tourism related employment
3,081

Percentage of all employment
4%

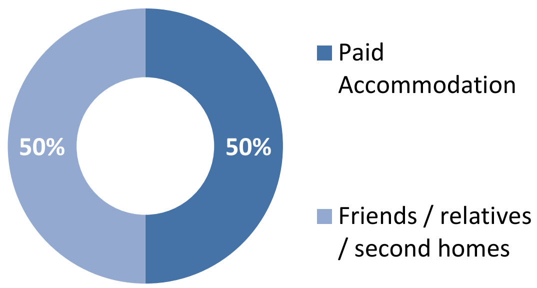
Economic Impact of Tourism – year on year comparisons				Year-on-year comparison	Pre-pandemic levels
Day Trips	**2021**	**2020**	**2019**	**2021 v 2020**	**2021 v 2019**
Day trips volume	1,496,000	1,078,000	1,919,000	39%	-22%
Day trips value	£56,392,000	£39,312,000	£73,028,000	43%	-23%
Overnight trips					
Number of trips	207,000	139,000	267,000	49%	-22%
Number of nights	988,000	710,000	1,281,000	39%	-23%
Trip value	£43,887,000	£27,680,000	£66,635,000	59%	-34%
Total value	£150,006,000	£105,038,000	£209,923,000	**43%**	**-29%**
Actual jobs	3,081	2,665	3,548	**16%**	**-13%**

	2021	2020	2019	2021 v 2020	2021 v 2019
Average length stay (nights x trip)	4.77	5.11	4.80	-6.7%	-0.6%
Spend x overnight trip	£212.01	£199.14	£249.57	6.5%	-15.0%
Spend x night	£44.42	£38.99	£52.02	13.9%	-14.6%
Spend x day trip	£37.70	£36.47	£38.06	3.4%	-0.9%

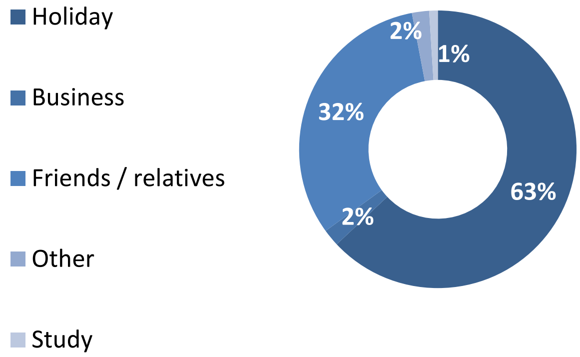
Economic Impact of Tourism – Headline Figures

St Albans - 2021 Results

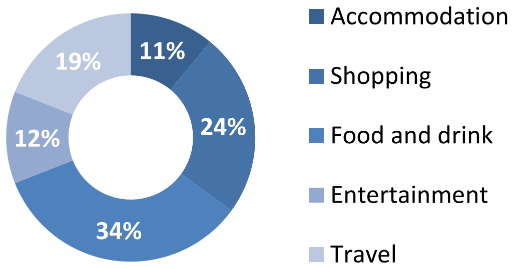
Trips by type of accommodation



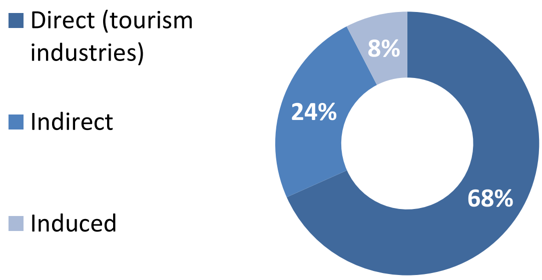
Trips by Purpose



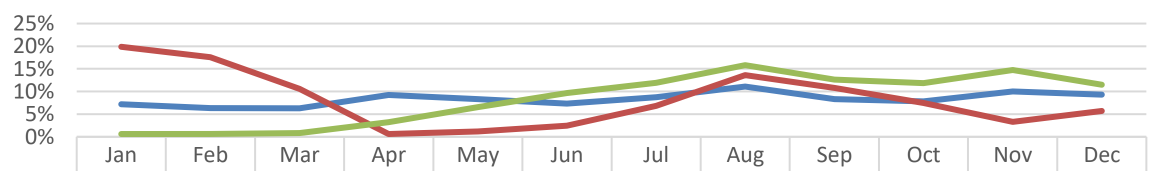
Breakdown of Expenditure



Type of Employment



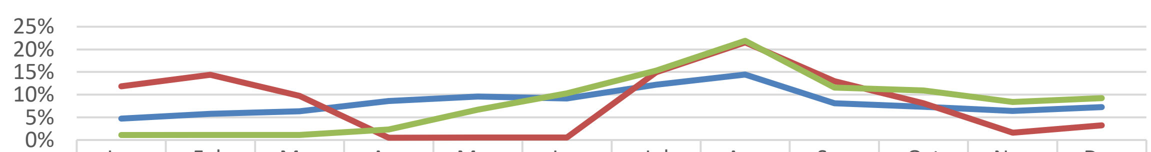
Seasonality - Day trip expenditure (England)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	7%	6%	6%	9%	8%	7%	9%	11%	8%	8%	10%	9%
2020	20%	18%	11%	1%	1%	2%	7%	14%	11%	7%	3%	6%
2021	1%	1%	1%	3%	7%	10%	12%	16%	13%	12%	15%	12%

2019 2020 2021

Seasonality - Overnight expenditure (England)



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	5%	6%	6%	9%	10%	9%	12%	14%	8%	7%	6%	7%
2020	12%	14%	10%	1%	1%	1%	15%	22%	13%	8%	2%	3%
2021	1%	1%	1%	2%	7%	10%	15%	22%	12%	11%	8%	9%

2019 2020 2021

Source: VisitBritain

Volume of Tourism

Staying visits in the county context

Staying trips in the county context

District	Domestic trips ('000)	Overseas trips ('000)
North Herts	126	13.0
Stevenage	100	8.7
East Herts	180	18.4
Broxbourne	88	10.0
Welwyn Hatfield	121	14.0
St Albans	189	18.0
Dacorum	182	15.8
Three Rivers	59	9.6
Watford	130	10.1
Hertsmere	102	10.6
Hertfordshire	**1,277**	**128.2**

Staying nights in the county context

District	Domestic nights ('000)	Overseas nights ('000)
North Herts	624	95.0
Stevenage	449	52.5
East Herts	911	169.7
Broxbourne	478	69.0
Welwyn Hatfield	603	178.9
St Albans	854	134.0
Dacorum	851	118.9
Three Rivers	355	62.5
Watford	551	68.1
Hertsmere	492	77.2
Hertfordshire	**6,168**	**1,025.8**

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

St Albans - 2021 Results

Trips by Accommodation

	UK		Overseas		Total	
Serviced	89,000	47%	200	1%	89,000	43%
Self catering	1,000	1%	200	1%	1,000	1%
Camping	0	0%	0	0%	0	0%
Static caravans	0	0%	0	0%	0	0%
Group/campus	0	0%	0	0%	0	0%
Paying guest	0	0%	2,000	11%	2,000	1%
Second homes	1,000	1%	900	5%	1,000	1%
Boat moorings	0	0%	0	0%	0	0%
Other	8,000	4%	2,000	11%	10,000	5%
Friends & relatives	90,000	47%	12,700	71%	104,000	49%
Total 2021	**189,000**		**18,000**		**207,000**	
Comparison 2020	**115,000**		**24,000**		**139,000**	
Difference	**64%**		**-25%**		**49%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	238,000	28%	1,000	1%	239,000	24%
Self catering	3,000	1%	2,000	1%	5,000	1%
Camping	0	0%	0	0%	0	0%
Static caravans	0	0%	0	0%	0	0%
Group/campus	0	0%	0	0%	0	0%
Paying guest	0	0%	16,000	12%	16,000	2%
Second homes	3,000	1%	9,000	7%	12,000	1%
Boat moorings	0	0%	0	0%	0	0%
Other	47,000	5%	2,000	1%	49,000	5%
Friends & relatives	563,000	65%	104,000	78%	667,000	67%
Total 2021	**854,000**		**134,000**		**988,000**	
Comparison 2020	**520,000**		**190,000**		**710,000**	
Difference	**64%**		**-29%**		**39%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£19,676,000	51%	£92,000	2%	£19,768,000	45%
Self catering	£306,000	1%	£108,000	2%	£414,000	1%
Camping	£0	0%	£0	0%	£0	0%
Static caravans	£0	0%	£0	0%	£0	0%
Group/campus	£0	0%	£0	0%	£0	0%
Paying guest	£0	0%	£666,000	12%	£666,000	2%
Second homes	£172,000	1%	£235,000	4%	£407,000	1%
Boat moorings	£0	0%	£0	0%	£0	0%
Other	£2,107,000	5%	£214,000	4%	£2,321,000	5%
Friends & relatives	£16,171,000	42%	£4,140,000	76%	£20,311,000	46%
Total 2021	**£38,432,000**		**£5,455,000**		**£43,887,000**	
Comparison 2020	**£20,039,000**		**£7,641,000**		**£27,680,000**	
Difference	**92%**		**-29%**		**59%**	

Serviced accommodation includes hotels, guesthouses, inns, B&B and serviced farmhouse accommodation. Paying guest refers to overseas visitors staying in private houses, primarily language school students. Other trips includes nights spent in transit, in lorry cabs and other temporary accommodation.

Staying Visitors - Purpose of Trip

St Albans - 2021 Results

Trips by Purpose

	UK		Overseas		Total	
Holiday	128,500	68%	3,100	17%	131,600	63%
Business	3,800	2%	0	0%	3,800	2%
Friends & relatives	52,900	28%	14,000	78%	66,900	32%
Other	3,800	2%	0	0%	3,800	2%
Study	0	0%	900	5%	900	1%
Total 2021	**189,000**		**18,000**		**207,000**	
Comparison 2020	**115,000**		**24,000**		**139,000**	
Difference	**64%**		**-25%**		**49%**	

Nights by Purpose

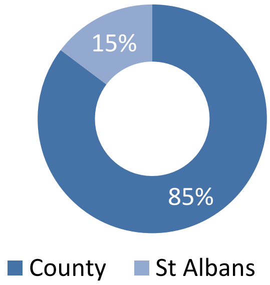
	UK		Overseas		Total	
Holiday	589,300	69%	13,400	10%	602,700	61%
Business	17,100	2%	0	0%	17,100	2%
Friends & relatives	230,500	27%	97,800	73%	328,300	33%
Other	17,100	2%	5,400	4%	22,500	2%
Study	0	0%	17,400	13%	17,400	2%
Total 2021	**854,000**		**134,000**		**988,000**	
Comparison 2020	**520,000**		**190,000**		**710,000**	
Difference	**64%**		**-29%**		**39%**	

Spend by Purpose

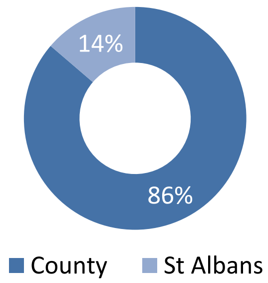
	UK		Overseas		Total	
Holiday	£20,369,000	53%	£981,900	18%	£21,350,900	48%
Business	£1,537,000	4%	£0	0%	£1,537,000	4%
Friends & relatives	£15,757,000	41%	£3,436,700	63%	£19,193,700	44%
Other	£769,000	2%	£272,700	5%	£1,041,700	2%
Study	£0	0%	£763,700	14%	£763,700	2%
Total 2021	**£38,432,000**		**£5,455,000**		**£43,887,000**	
Comparison 2020	**£20,039,000**		**£7,641,000**		**£27,680,000**	
Difference	**92%**		**-29%**		**59%**	

Proportion of staying visits in the county context

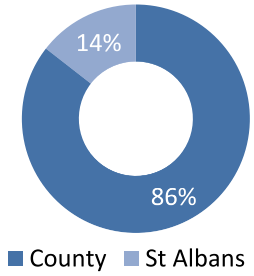
Overnight visits in the county context



Staying nights in the county context



Overnight spend in the county context



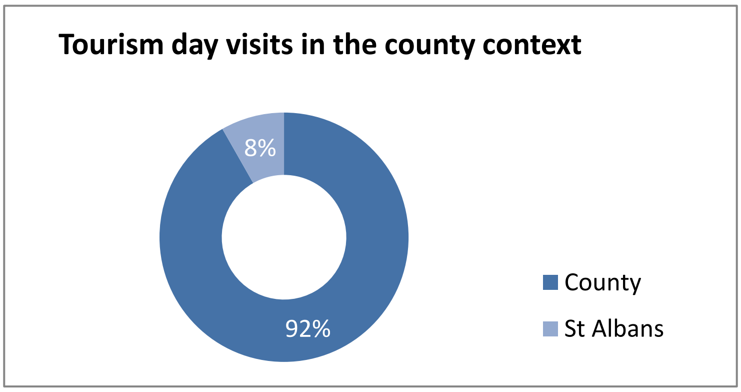
Day Visitors

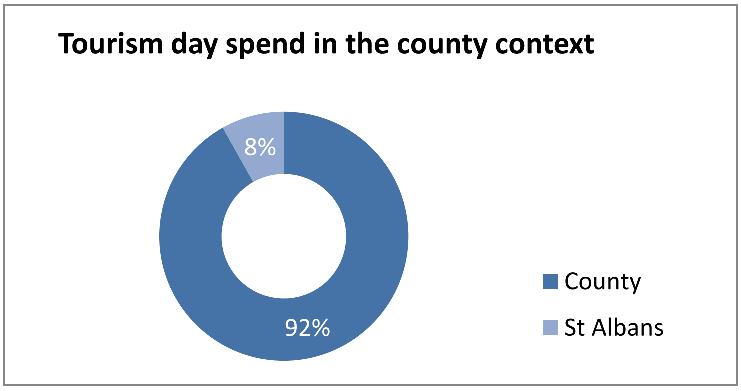
Total Volume and Value of Day Trips

		Trips	Spend
Urban visits		1,157,000	£49,568,000
Countryside visits		339,000	£6,824,000
Total	**2021**	**1,496,000**	**£56,392,000**
Comparison	**2020**	**1,078,000**	**£39,312,000**
Difference		**39%**	**43%**

Day Visitors in the county context

District	Day Visits (millions)	Day visits 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**



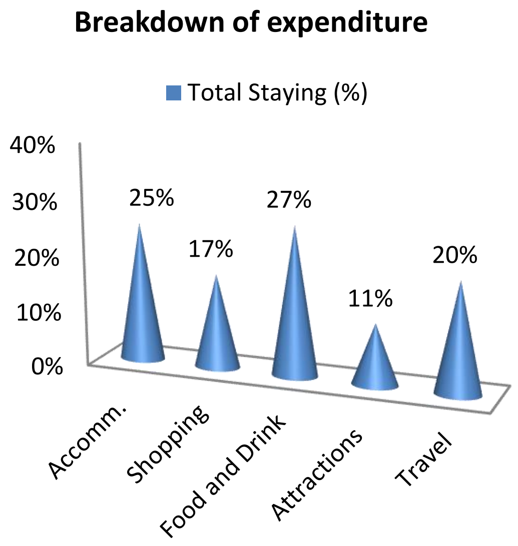


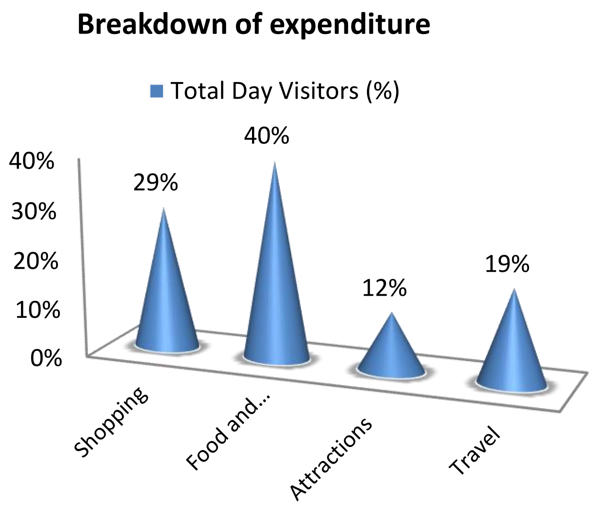
Value of Tourism

Expenditure Associated with Trips

Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£9,992,300	£5,764,800	£10,376,600	£4,227,500	£8,070,800	£38,432,000
Overseas tourists	£1,254,700	£1,691,100	£1,309,200	£654,600	£545,400	£5,455,000
Total Staying	£11,247,000	£7,455,900	£11,685,800	£4,882,100	£8,616,200	£43,887,000
Total Staying (%)	25%	17%	27%	11%	20%	100%
Total Day Visitors	£0	£16,353,700	£22,556,800	£6,767,000	£10,714,500	£56,392,000
Total Day Visitors (%)	0%	29%	40%	12%	19%	100%
Total 2021	**£11,247,000**	**£23,809,600**	**£34,242,600**	**£11,649,100**	**£19,330,700**	**£100,279,000**
%	**11%**	**24%**	**34%**	**12%**	**19%**	**100%**
Comparison 2020	**£6,882,000**	**£16,747,000**	**£22,937,000**	**£7,883,000**	**£12,541,000**	**£66,990,000**
Difference	**63%**	**42%**	**49%**	**48%**	**54%**	**50%**





Other Expenditure Associated with Tourism Activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£229,000	£0	£0	£15,654,000	£15,883,000

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

St Albans - 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 Visitor	Day Visitors	Total
Accommodation		£11,401,000	£452,000	£11,853,000
Retail		£7,384,000	£16,141,000	£23,525,000
Catering		£11,269,000	£21,920,000	£33,189,000
Attractions		£5,005,000	£7,299,000	£12,304,000
Transport		£5,297,000	£6,347,000	£11,644,000
Non-trip spend		£15,883,000	£0	£15,883,000
Total Direct	**2021**	**£56,239,000**	**£52,159,000**	**£108,398,000**
Comparison	**2020**	**£38,311,000**	**£37,424,000**	**£75,735,000**
Difference		**47%**	**39%**	**43%**

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

Supplier and Income Induced Turnover

		Staying Visitor	Day Visitors	Total
Indirect spend		£13,507,000	£14,806,000	£28,313,000
Non trip spending		£3,351,000	£0	£3,351,000
Income induced		£7,654,000	£2,290,000	£9,944,000
Total	**2021**	**£24,512,000**	**£17,096,000**	**£41,608,000**
Comparison	**2020**	**£16,938,000**	**£12,365,000**	**£29,303,000**
Difference		**45%**	**38%**	**42%**

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

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

		Staying Visitor	Day Visitors	Total
Direct		£56,239,000	£52,159,000	£108,398,000
Indirect		£24,512,000	£17,096,000	£41,608,000
Total Value	**2021**	**£80,751,000**	**£69,255,000**	**£150,006,000**
Comparison	**2020**	**£55,249,000**	**£49,789,000**	**£105,038,000**
Difference		**46%**	**39%**	**43%**

Employment

The model generates estimates of full time equivalent jobs based on visitor spending. The total number of 'actual' jobs will be higher when part time and seasonal working is taken into account. Conversion of full time equivalent jobs into actual jobs relies on information from business surveys in the sectors receiving visitor spending. A new Full Time Equivalent tourism job is created with every £48,600 increase in tourism revenue.

Direct Employment

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Accommodation		187	22%	7	1%	194	13%
Retailing		64	7%	139	22%	203	13%
Catering		167	19%	324	51%	491	33%
Entertainment		86	10%	126	20%	212	14%
Transport		34	4%	41	6%	75	5%
Non-trip spend		327	38%	0	0%	327	22%
Total FTE	**2021**	**865**		**637**		**1,502**	
Comparison	**2020**	**749**		**596**		**1,344**	
Difference		**15%**		**7%**		**12%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Accommodation		277	24%	11	1%	288	14%
Retailing		95	8%	208	22%	303	14%
Catering		250	21%	486	52%	736	35%
Entertainment		122	11%	177	19%	299	14%
Transport		48	4%	58	6%	106	5%
Non-trip spend		373	32%	0	0%	373	18%
Total Actual	**2021**	**1,165**		**940**		**2,105**	
Comparison	**2020**	**1,006**		**882**		**1,888**	
Difference		**16%**		**7%**		**12%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitor	Day Visitors	Total
Indirect jobs		347	305	652
Induced jobs		157	47	204
Total FTE	**2021**	**504**	**352**	**856**
Comparison	**2020**	**394**	**288**	**681**
Difference		**28%**	**22%**	**26%**

Estimated actual jobs				
		Staying Visitor	Day Visitors	Total
Indirect jobs		395	347	742
Induced jobs		180	54	234
Total Actual	**2021**	**575**	**401**	**976**
Comparison	**2020**	**449**	**328**	**777**
Difference		**28%**	**22%**	**26%**

Total Tourism Jobs

St Albans - 2021 Results

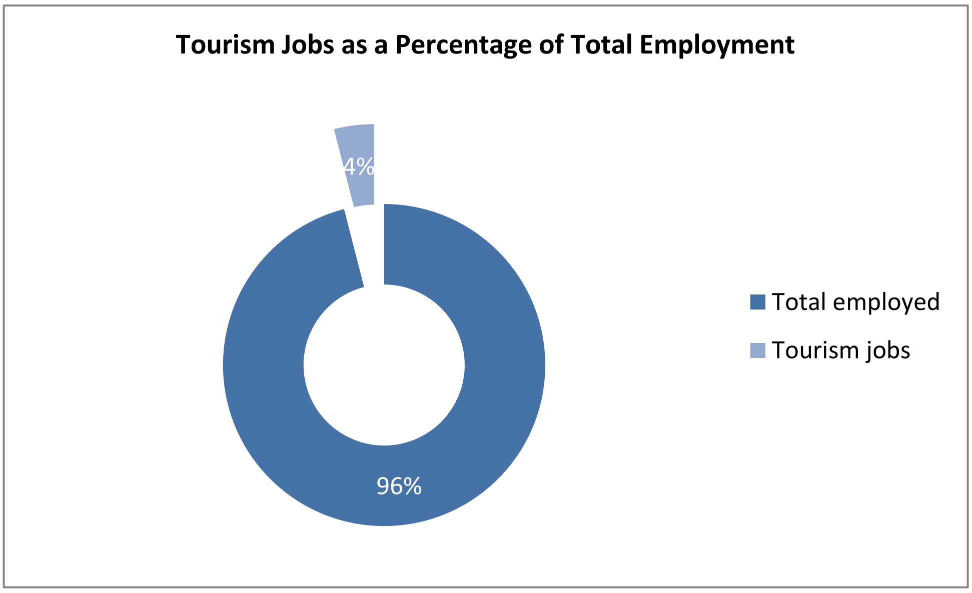
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Direct		865	63%	637	64%	1,502	64%
Indirect		347	25%	305	31%	652	27%
Induced		157	12%	47	5%	204	9%
Total FTE	**2021**	**1,369**		**989**		**2,358**	
Comparison	2020	1,142		884		2,026	
Difference		20%		12%		16%	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Direct		1,165	67%	940	70%	2,105	68%
Indirect		395	23%	347	26%	742	24%
Induced		180	10%	54	4%	234	8%
Total Actual	**2021**	**1,740**		**1,341**		**3,081**	
Comparison	2020	1,455		1,210		2,665	
Difference		20%		11%		16%	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day Visitors	Total
Total employed		74,850	74,850	74,850
Tourism jobs		1,740	1,341	3,081
Proportion all jobs		**2%**	**2%**	**4%**
Comparison	2020	1,455	1,210	2,665
Difference		20%	11%	16%



Economic Impact of Tourism – Headline Figures St Albans - 2021 Results

The key 2021 results of the Economic Impact Assessment are:

1.7 million trips were undertaken in the area
1.5 million day trips
0.2 million overnight visits

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

£108 million spent by tourists during their visit to the area
£9 million spent on average in the local economy each month.

£44 million generated by overnight visits
£56 million generated from day trips.

£150 million spent in the local area as result of tourism, taking into account multiplier effects.

3,081 jobs supported, both for local residents from those living nearby.
2,105 tourism jobs directly supported
976 non-tourism related jobs supported linked to multiplier spend from tourism.

Appendix I - Introduction about Cambridge Model

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

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 Feastival 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.

Produced by:

destinationresearch
delivering results : measuring what matters

Registered in England No. 9096970
VAT Registration No. GB 192 3576 85

45 Colchester Road
Manningtree
CO11 2BA