NORTH NORFOLK DISTRICT COUNCIL

Sheringham and Dudgeon Extension Projects (EN010109)

DEADLINE 1 SUBMISSION - LOCAL IMPACT REPORT

NORTH NORFOLK DISTRICT COUNCIL

20 FEB 2023

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1. Introduction

1.1. This report sets out North Norfolk District Council's (NNDC) position in relation to the Development Consent Order (DCO) application for the Sheringham and Dudgeon Extension Projects made under the Planning Act (2008).

1.2. NNDC is an Interested Party to this Nationally Significant Infrastructure Project (NSIP) with offshore cables reaching landfall at Weybourne and the onshore cable corridor passing through the District.

1.3. In responding to this NSIP application, the District Council has drawn from, amongst other things, internal expertise in relation to:

- Coastal Processes
- Landscape and Visual Impacts
- Ecology
- Environmental Protection
- Economic Development

1.4. Were NNDC assessing the application under its functions as a Local Planning Authority, it would normally seek advice from external partners including Norfolk County Council who undertake a number of functions including as Highway Authority, Public Rights of Way and Lead Local Flood Authority. As the County Council is also an Interested Party, where stated within this report, NNDC will defer matters for consideration or comment of the County Council, given their statutory roles and considered knowledge and expertise.

2. Description of North Norfolk

2.1. NNDC's jurisdiction extends inland from the Mean Low-Water mark along the coastline. The proposal would affect land within NNDC stretching from the intertidal area at Weybourne and inland along the proposed cable route and 45m to 65m wide working corridor until it passes southwards out of the district into Broadland District Council near to Corpusty.

2.2. North Norfolk District covers an area of 87,040 hectares (340 square miles) (excluding the Broads Authority Executive Area), with a 73km (45 mile) North Sea coastline. A significant proportion of the District is included within the nationally designated Norfolk Coast Area of Outstanding Natural Beauty (AONB) and the North Norfolk Heritage Coast. The eastern end of the District also adjoins The Broads, which has the status of a National Park.

2.3. The main settlements in the District comprise seven towns (Cromer, Fakenham, Holt, North Walsham, Sheringham, Stalham and Wells-next-the-Sea) and three large villages (Briston / Melton Constable, Hoveton & Mundesley), which accommodate approximately half of the District's population (103,000 at the 2021 Census).

2.4. The District's main road network comprises the A140 (Cromer to Norwich), the A148 (Cromer to King's Lynn - via Holt and Fakenham) and the A1065 (Fakenham to Mildenhall), as well as the more minor A1067, A149 and A1151. There is only one public rail service in the District, comprising the 'Bittern Line' linking Sheringham with Norwich (with stops between including the settlements of Cromer and North Walsham).

2.5. The District has a strongly rural character with agriculture, in particular arable farmland, comprising by far the largest component of land use. The District contains a large number of agricultural holdings which are predominantly arable in nature and which include areas containing some of the best and most versatile agricultural land.

2.6. A network of Rights of Way crosses open fields, heathlands and woodlands. Many of the large areas of coastline, heathland and woodland have open access. The Norfolk Coast Path National Trail follows the entirety of the District's coastline, linking with the Peddars Way in the west and the Paston Way in the east.

2.7. There are many positive aspects of the North Norfolk environment such as:

- The stunning landscape of the North Norfolk Coast AONB, carefully managed by the Norfolk Coast Partnership to ensure it can be enjoyed by generations to come.
- The large number of internationally and nationally designated sites and nature reserves, home to many rare and protected species and landscapes.
- The wealth of archaeological and historic environment sites throughout the district, from the prehistoric to the Cold War.
- The rare arable plants thriving in pockets of North Norfolk farmland.
- The conservation groups, organisations and individuals working hard to record, protect and enhance the natural environment of North Norfolk.

2.8. The District also has a significant tourism economy supporting an estimated 8,898 jobs in 2021 (22% of total employment in North Norfolk) with a total tourism value of £365m. The North Norfolk Core Strategy recognises the importance of tourism to the district. The strategic vision for North Norfolk in section 2 of the Core Strategy includes at paragraph 2.1.4:

> "**Sustainable tourism**, building on the unique natural assets of the countryside and coast, will be a major source of local income and employment and will be supported by an enhanced network of long-distance paths and cycle routes such as the North Norfolk Coastal Path and Weavers Way."

3. Principle of Renewable Energy

3.1. NNDC is fully supportive of the principle of renewable energy development in helping to tackle the challenges faced by climate change.

3.2. On 24 April 2019, NNDC's Full Council agreed a motion declaring a Climate Emergency. With the motion the Council acknowledged:

- The devastating impacts that climate change and global temperature increases will have on the lives and livelihoods of people around the world, including on the health, safety and wellbeing of North Norfolk residents;
- The urgent need for action to be taken fast enough for there to be a chance of further climate change being limited to avoid the worst impacts of drought, floods and extreme heat;
- The opportunity for individuals and organisations at all levels to take action on reducing carbon emissions, from both production and consumption;
- The need to enable low carbon living across society through changes to laws, taxation, infrastructure, policies and plans;
- The Council's responsibility to help secure an environmentally sustainable future for our residents and in relation to the global effects of climate change.

3.3. The Council resolved to;

1. Declare a Climate Emergency;
2. Engage and work in partnership with our partners in the public, private and community sectors, including central government to facilitate bold action to ensure North Norfolk is able to play its role in helping the UK to deliver against the commitments made nationally and internationally at the 2015 Paris Summit;
3. Prepare an Environmental Sustainability & Climate Change Strategy in line with this pledge, and, with our partners across the community, to

develop an action plan and 'route map' to a sustainable, low carbon future for our community;

4. Launch engagement with the public to:
   - Improve "carbon literacy" of all citizens;
   - Encourage and support leadership on this issue in all sectors of society;
   - Obtain meaningful public input into the North Norfolk Environmental Sustainability & Climate Change Strategy and action planning;
   - Facilitate wide community engagement and behavioural change.

3.4. The Declaration of a Climate Emergency set the Council on a pathway towards doing all that it reasonably can to address the impacts of climate change. This will undoubtedly include continuing to support renewable energy National Significant Infrastructure Project proposals and working with applicants to deliver these projects in a way that minimises any adverse impacts.

3.5. The District Council recognises the national importance of having a balanced supply of electrical generation including increasing renewable energy supplies from offshore turbines in helping decarbonise the UK's energy sector. Accordingly, the project's contribution to renewable energy is a significant **positive impact**.

3.6. The Council has already played an active part in a number of Nationally Significant Infrastructure Projects (NSIP) including:

- Ørsted Hornsea Project Three (2.4GW) offshore windfarm; and
- Vattenfall Norfolk Vanguard (1.8GW) offshore windfarm
- Vattenfall Norfolk Boreas (1.8GW) offshore windfarm

All of these schemes reach landfall on the North Norfolk coast with associated cable corridors and booster stations (Ørsted Hornsea Project Three) running through the District. These schemes alone (together with SEP & DEP

Extension Projects would, once built, provide enough electricity combined to power in excess of 5.3 million homes (more than 16% of total UK households). This would make a significant contribution towards the UK's commitment towards 'net zero' greenhouse gases to be delivered by 2050.

3.7. At a local level, the District Council has made a significant contribution of its own through, amongst other things, the grant of planning permission for in excess of 150MW capacity of solar farms, with electrical output capable of powering over 40,000 homes, in North Norfolk. This has been delivered without significant adverse impacts on the wider landscape (including development within and/or adjacent to the Norfolk Coast Area of Outstanding Natural Beauty) through, amongst other things, careful siting and design.

3.8. The onshore element of the SEP & DEP projects passes through some sensitive and valued landscapes and this emphasises the importance of key design considerations which will help to reduce overall impacts, both short, medium and long-term.

4. Marine Processes

4.1. NNDC's jurisdiction extends inland from the Mean Low-Water mark. This means that an element of the marine processes falls within the consideration of the District Council at the point where offshore cables come onshore.

4.2. The main area of interest for the District Council is in relation to the method of bringing offshore cables onshore in the Weybourne area including the potential impact of works on nearshore coastal processes. NNDC welcome the position set out by Equinor at paragraph 250 of Chapter 4 (Project Description) of the Environmental Statement which states:

> 'The offshore export cables make landfall at Weybourne, at a location to the west of Weybourne beach car park in proximity to the Muckleburgh Military Collection. The offshore export cables will be connected to the onshore export cables in transition joint bays, having been installed under the intertidal zone by HDD. …This technique has been selected by the Applicant in order to avoid any impact on the features of the MCZ in this area'.

4.3. NNDC are fully supportive of the proposed use of HHD by Equinor to bring cables onshore for these projects.

4.4. In the likely event of the DCO being granted, NNDC would <u>not</u> expect that any subsequent changes from the HDD option to bring cables onshore to the use of open cut trenching could be permitted within the scope of a 'non-material' amendment as this would take the proposal outside the scope of the Environmental Statement. 'Open cut trenching' would represent the very worst option for NNDC, hence why there is strong support for HDD.

5. Water Resources and Flood Risk

5.1. In respect of the impact of the project on water resources and flood risk within NNDC jurisdiction, NNDC defer to the expert advice of the Environment Agency in respect of the strategic overview of the management of all sources of flooding and coastal erosion, and to the advice of Norfolk County Council Lead Local Flood Authority in respect of developing, maintaining and applying a strategy for local flood risk management in this area and for maintaining a register of flood risk assets. NNDC also defer to the advice of Norfolk Rivers Internal Drainage Board who may manage assets within/along/near the route of the proposed onshore cable corridor.

6. Land Use and Agriculture

6.1. NNDC consider that the primary consideration for land use and agriculture relates to the timing of works (such as avoiding taking agricultural land out of production for long periods of time) how works are undertaken (to be agreed within the Outline Code of Construction Practice (OCoCP) including the method for handling/storing soils. As such the significance of any impacts are dependent on the requirements to be agreed within the DCO.

7. Onshore Ecology and Onshore Ornithology

7.1. Equinor have undertaken desktop studies and Extended Phase 1 Habitat Surveys together with site specific surveys in accordance with best practice recommendations in order to inform the baseline data which underpin Environmental Statement Volume 1 Chapter 20 – Onshore Ecology and Ornithology [APP-106]. NNDC consider that some update / pre-construction surveys are likely to be required for some species and that the results of these surveys should be used to identify any amendments to proposed mitigation within the Outline Ecological Management Plan (OEMP) and/or licensing requirements necessary.

7.2. NNDC are broadly supportive of proposed DCO Requirement 13 ‘Ecological Management Plan’ subject to agreement to the final OEMP document which underpins the requirement and which should ensure key ecological objectives are met.

8. Traffic and Transport

8.1. NNDC do not wish to comment on traffic and transport matters and defer such matters of consideration to Norfolk County Council, who are the Highway Authority covering North Norfolk and who are the technical experts who would normally give highway advice to the District Council.

9. Noise, Vibration and Air Quality

9.1. Whilst NNDC raise no Air Quality impact concerns, at the time of submission of this Local Impact Report, discussions are on-going as part of the Statement of Common Ground (SoCG) in relation to significant noise and vibration concerns. These matters relate primarily to baseline evidence and the impact this baseline data has on suggested mitigation.

9.2. NNDC have raised concerns with the Applicant that there is potential for the underestimation of evening and night-time noise impacts, as background noise may be lower than the survey indicates. This may result in insufficient noise mitigation measures being selected, with adverse impacts on nearby receptors. Further discussions are taking place with additional submissions expected at Deadline 2.

9.3. NNDC will continue to work with the applicant to ensure the DCO requirements and underpinning OCoCP documents can deliver their intended purpose.

10. Onshore Archaeology and Cultural Heritage

10.1. NNDC consider that, whilst there will be some impacts to heritage assets and their settings, this impact will occur primarily at construction stage and are therefore of a temporary nature.

10.2. NNDC consider that these impacts are all on the ‘less than substantial’ scale and the operational phase of the windfarm is considered unlikely to result in unacceptable impacts. On this basis, the considerable public benefits associated with the windfarm would more than outweigh the ‘less than substantial’ harm to heritage assets within North Norfolk.

10.3. In respect of archaeology, NNDC defers to the advice of Norfolk County Council Historic Environment Service who provide advice to NNDC in relation to all matters of archaeological heritage.

11. Landscape and Visual Impact Assessment

11.1. NNDC consider that there will be some residual landscape and visual effects after the construction phase associated with tree and hedgerow removal. It is noted that the onshore cable route easement would prevent replacement trees being planted and this will require careful consideration with regard to mitigation planting.

11.2. For previous NSIP offshore windfarm schemes, NNDC identified a need (evidenced by climatic variances) for 10-year replacement planting periods for proposed mitigation planting. NNDC is pleased to see that the applicant proposes 10-year replacement planting period as contained within draft DCO Requirement 12 (2).

11.3. NNDC have raised some concerns with the applicant about Weybourne Woods where a 100m x 50m area of woodland will require clearance for a drill entry/exit compound. NNDC note that paragraph. 1.2.3.26 of the Outline Landscape Management Plan (OLMP) states:

> 'Where coniferous plantation trees would be permanently removed, the land will be re-instated to a suitable habitat agreed with the land owner and that accord with the objectives of the wider AONB'.

11.4. NNDC note that OLMP makes very little reference to the principles that will guide replacement and mitigation planting along the cable route. NNDC consider it should be set out within the OLMP that proposals will be informed by the Landscape Guidelines set out in both the North Norfolk Landscape Character Assessment (2021 SPD) and the Norfolk Coast AONB Integrated Landscape Character Guidance. Discussions are on-going between NNDC and the applicant and further responses are expected to be provided for Deadline 2

12. Tourism, Recreation and Socio-Economics

12.1. During the examination of Ørsted Hornsea Project Three, Norfolk Vanguard and Norfolk Boreas offshore windfarm NSIPs, NNDC made numerous submissions concerning the impact of proposed windfarm construction activities on tourism within North Norfolk, arising from direct impacts and from the impacts of negative perceptions caused by awareness of the construction activity taking place. NNDC have some concerns that the impact of the project on tourism may well be being underestimated by the Applicant.

12.2. Based on 2021 data, the Tourism sector in North Norfolk has retracted significantly compared to 2018 data. In 2021 the District supported an estimated 8,898 jobs (22% of total employment in North Norfolk) with a total tourism value of £365m total tourism value. In 2018 this figure was £511m total tourism value, 11,461 jobs (29% of total employment). Whilst this impact is likely as a direct result of Covid-19 and changing patterns of behaviour, any further impacts upon the tourism sector will likely have a disproportionately high impact upon the overall economy of the District. (Source: Economic Impact of Tourism – North Norfolk 2018 and 2021 produced by Destination Research/Sergi Jarques – Copies attached at **Appendix A** and **Appendix B**.

12.3. In this regard, whilst NNDC believes the long-term impacts of the cable route on the tourism economy will be benign, the Council has very significant concerns that during the cable corridor construction phase there will be serious impacts on local tourism businesses such that the construction works will have a substantial impact on the income of tourism businesses in the area, which needs greater recognition within the DCO.

12.4. NNDC considers that the impact on tourism arises primarily from negative perceptions. A better description would be “Actual Tourism Impact of Negative Perceptions”.

12.5. NNDC's position in previous windfarm examinations has been that the DCO should include a requirement for a tourism and associated business impact mitigation strategy to address the likely adverse impacts on the tourism sector within North Norfolk.

12.6. However, despite reasonable evidence being presented, the concerns of NNDC were not taken forward by the ExA or Secretary of State when granting subsequent DCO consent for Norfolk Vanguard and Norfolk Boreas. The ExA are invited to consider whether any further evidence is required on this issue.

13. Statement of Common Ground

13.1. At the time of submission of this Local Impact Report (Deadline 1 – 20 Feb 2023), NNDC and Equinor have been working together to produce a Statement of Common Ground.

13.2. This will ensure that there will be a clear understanding of the areas of agreement and areas of disagreement to enable focussed discussion at the Issue Specific Hearings.

13.3. Further discussions are proposed to take place in the coming weeks and Equinor have confirmed that they will submit the latest iteration of the draft/interim Statement of Common Ground to the Planning Inspectorate at Deadline 2 following those discussions.

13.4. Many of the issues raised within the draft Statement of Common Ground are captured within this Local Impact Report.

14. Conclusions

14.1. NNDC welcome and support the principle of renewable energy development to help meet the challenges of climate change and support the development of stronger and resilient electricity networks capable of reducing reliance on fossil fuels and to reduce the need to import electricity from outside of UK waters.

14.2. Nonetheless, the proposed SEP & DEP Project has the potential to result in some impacts across North Norfolk District, particularly during construction and it is important that those adverse impacts are reduced as much as possible and appropriate mitigation provided. Many of the potential impacts are or can be made acceptable through the drafting of the Development Consent Order.

14.3. However, there remain some areas of disagreement between the parties but the majority of matters or issues are capable of being resolved either through existing proposed requirements within the draft DCO, amendments to specific requirements in the draft DCO, introduction of new requirements or clarifications to Outline documents supporting specific requirements.

14.4. NNDC will continue to work with Equinor to resolve outstanding matters and to ensure that the maximum amount of community benefits can be secured both through the Development Consent Order process and through individual negotiation for the wider benefit of North Norfolk.

Appendix A - Economic Impact of Tourism – North Norfolk 2021 produced by Destination Research/Sergi Jarques

destinationresearch
delivering results : measuring what matters

Economic Impact of Tourism

2021 Results

Economic Impact of Tourism

North Norfolk - 2021

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Total number of trips (day & staying)
6,082,100

Total staying trips
449,100

Total day trips
5,633,000

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

Total staying nights
1,765,000

Associated spend
£28,049,323

Total staying spend
£99,584,000

Total day trip spend
£191,576,000

Total visitor spend
£298,585,323

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.

Indirect / induced spend
£66,636,000

Total Tourism Value
£365,221,323

Full time equivalent jobs
6,426

Total actual tourism related employment
8,898

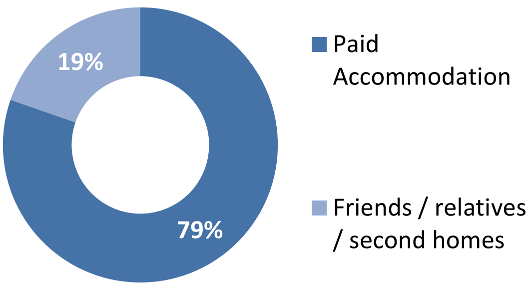
Percentage of all employment
22.2%

Economic Impact of Tourism – Year on year comparisons

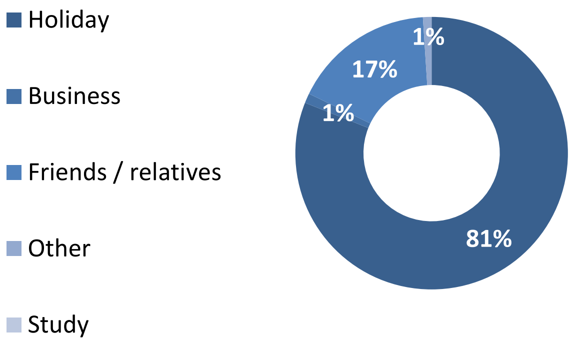
				Year-on-year comparison	Pre-pandemic levels
Day Trips	**2021**	**2020**	**2019**	**2021 v 2020**	**2021 v 2019**
Day trips Volume	5,633,000	4,115,000	9,317,000	37%	-40%
Day trips Value	£191,576,000	£132,255,000	£292,356,000	45%	-34%
Overnight trips					
Number of overnight trips	449,100	285,600	602,200	57%	-25%
Number of nights	1,765,000	1,114,000	2,474,000	58%	-29%
Overnight trip value	£99,584,000	£58,407,000	£142,955,000	71%	-30%
Total Value	**£365,221,323**	**£237,339,241**	**£528,931,378**	**54%**	**-31%**
Actual Jobs	**8,898**	**8,022**	**11,898**	**11%**	**-25%**

	2021	2020	2019	2021 v 2020	2021 v 2019
Average length stay (nights x trip)	3.93	3.90	4.11	0.9%	-4.3%
Spend x overnight trip	£221.79	£204.22	£237.39	8.6%	-6.6%
Spend x night	£56.42	£52.43	£57.78	7.6%	-2.4%
Spend x day trip	£34.01	£32.14	£31.38	5.8%	8.4%

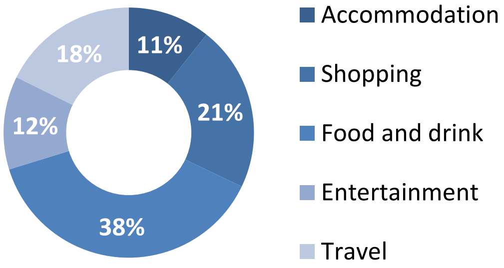
Type of Accommodation



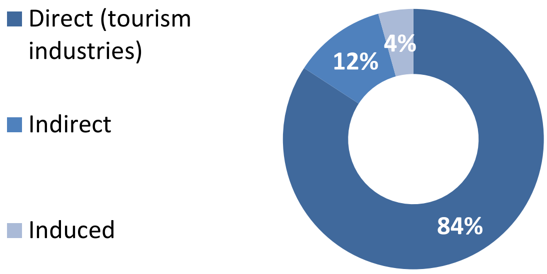
Trips by Purpose



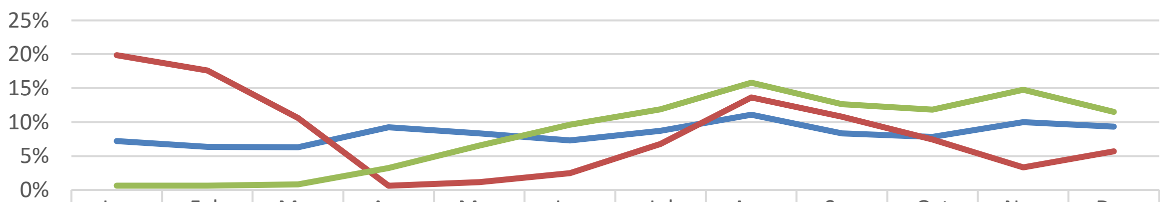
Breakdown of expenditure



Type of employment



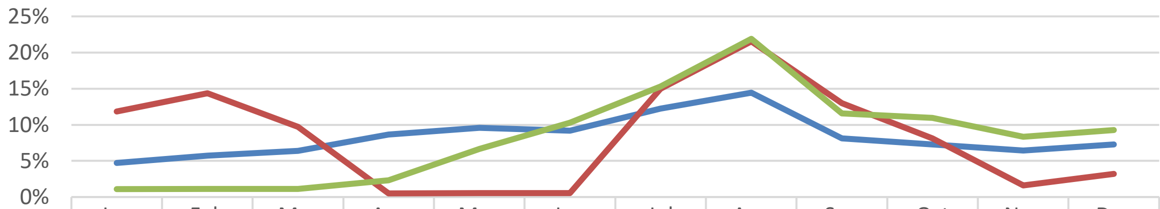
Seasonality - Day trip expenditure



	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



	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

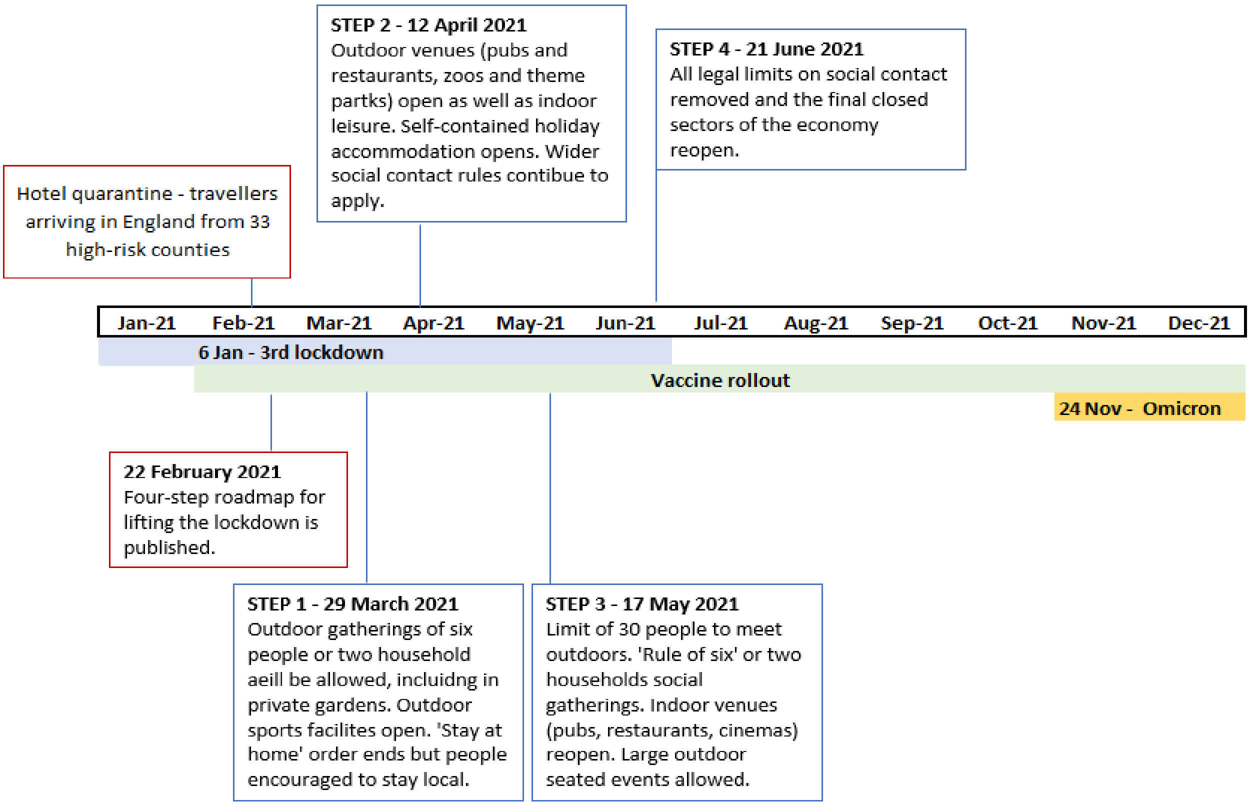
Introduction

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.

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 lock down 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) will be 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: As coronavirus restrictions come to an end, industries in the UK are experiencing the effects of the pandemic in different ways. Employment has fallen in the accommodation and food sectors. Data from the Office for National Statistics (ONS) shows that in 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 of 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).

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	68,000	15%	800	10%	68,800	15%
Self catering	88,000	20%	1,900	24%	89,900	20%
Camping	59,000	13%	700	9%	59,700	13%
Static caravans	88,000	20%	300	4%	88,300	20%
Group/campus	18,000	4%	1,100	14%	19,100	4%
Paying guest	0	0%	0	0%	0	0%
Second homes	23,000	5%	700	9%	23,700	5%
Boat moorings	12,000	3%	0	0%	12,000	3%
Other	15,000	3%	200	3%	15,200	3%
Friends & relatives	72,000	16%	2,500	31%	74,500	17%
Total 2021	**441,000**		**8,000**		**449,000**	
Comparison 2020	**279,000**		**7,000**		**286,000**	
Difference	**58%**		**14%**		**57%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	185,000	11%	3,000	4%	188,000	11%
Self catering	275,000	16%	36,000	45%	311,000	18%
Camping	254,000	15%	3,000	4%	257,000	15%
Static caravans	452,000	27%	1,000	1%	453,000	26%
Group/campus	46,000	3%	18,000	23%	64,000	4%
Paying guest	0	0%	0	0%	0	0%
Second homes	95,000	6%	3,000	4%	98,000	6%
Boat moorings	46,000	3%	0	0%	46,000	3%
Other	86,000	5%	0	0%	86,000	5%
Friends & relatives	245,000	15%	16,000	20%	261,000	15%
Total 2021	**1,685,000**		**80,000**		**1,765,000**	
Comparison 2020	**1,055,000**		**59,000**		**1,114,000**	
Difference	**60%**		**36%**		**58%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£18,094,000	19%	£242,000	6%	£18,336,000	18%
Self catering	£19,109,000	20%	£2,044,000	47%	£21,153,000	21%
Camping	£18,807,000	20%	£121,000	3%	£18,928,000	19%
Static caravans	£20,383,000	21%	£70,000	2%	£20,453,000	21%
Group/campus	£2,937,000	3%	£935,000	21%	£3,872,000	4%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£2,212,000	2%	£292,000	7%	£2,504,000	3%
Boat moorings	£2,548,000	3%	£0	0%	£2,548,000	3%
Other	£4,742,000	5%	£26,000	1%	£4,768,000	5%
Friends & relatives	£6,362,000	7%	£661,000	15%	£7,023,000	7%
Total 2021	**£95,194,000**		**£4,390,000**		**£99,584,000**	
Comparison 2020	**£55,300,000**		**£3,107,000**		**£58,407,000**	
Difference	**72%**		**41%**		**71%**	

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

Trips by Purpose

	UK		Overseas		Total	
Holiday	363,000	82%	1,700	21%	364,700	81%
Business	5,000	1%	200	2%	5,200	1%
Friends & relatives	70,000	16%	5,600	69%	75,600	17%
Other	4,000	1%	600	7%	4,600	1%
Study	0	0%	0	0%	0	0%
Total 2021	**441,000**		**8,100**		**449,100**	
Comparison 2020	**279,000**		**6,600**		**285,600**	
Difference	**58%**		**23%**		**57%**	

Nights by Purpose

	UK		Overseas		Total	
Holiday	1,392,000	83%	13,000	16%	1,405,000	80%
Business	14,000	1%	1,000	1%	15,000	1%
Friends & relatives	268,000	16%	60,000	75%	328,000	19%
Other	11,000	1%	5,000	6%	16,000	1%
Study	0	0%	0	0%	0	0%
Total 2021	**1,685,000**		**80,000**		**1,765,000**	
Comparison 2020	**1,055,000**		**59,000**		**1,114,000**	
Difference	**60%**		**36%**		**58%**	

Spend by Purpose

	UK		Overseas		Total	
Holiday	£83,274,000	87%	£1,262,000	29%	£84,536,000	85%
Business	£1,272,000	1%	£67,000	2%	£1,339,000	1%
Friends & relatives	£9,617,000	10%	£2,774,000	63%	£12,391,000	12%
Other	£1,031,000	1%	£288,000	7%	£1,319,000	1%
Study	£0	0%	£0	0%	£0	0%
Total 2021	**£95,194,000**		**£4,390,000**		**£99,584,000**	
Comparison 2020	**£55,300,000**		**£3,107,000**		**£58,407,000**	
Difference	**72%**		**41%**		**71%**	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

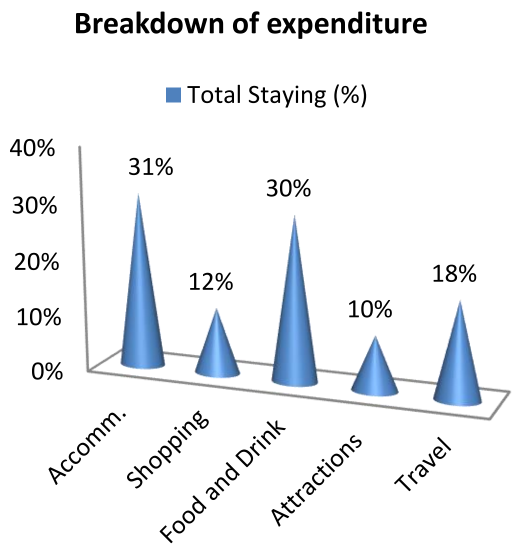
	Trips	Spend
Urban visits	2,060,000	£81,019,000
Countryside visits	2,234,000	£71,483,000
Coastal visits	1,339,000	£39,074,000
Total 2021	**5,633,000**	**£191,576,000**
Comparison 2020	**4,115,000**	**£132,255,000**
Difference	**37%**	**45%**

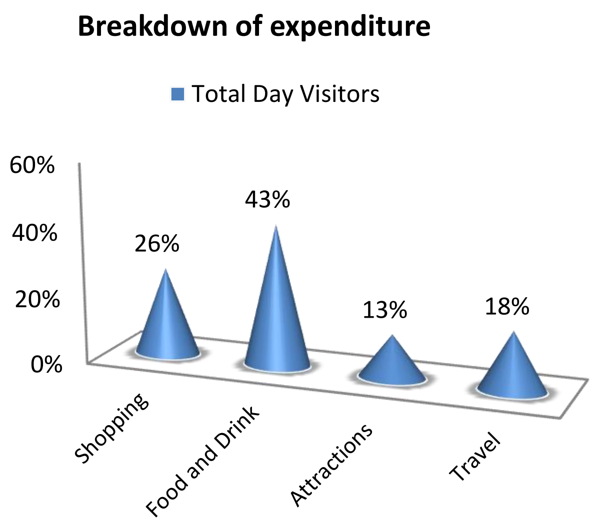
Value of Tourism

Expenditure Associated with Trips:

Direct Expenditure Associated with Trips

		Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists		£30,022,000	£10,481,000	£28,328,000	£9,392,000	£16,971,000	£95,194,000
Overseas tourists		£1,020,000	£1,310,000	£1,127,000	£468,000	£466,000	£4,391,000
Total Staying		£31,042,000	£11,791,000	£29,455,000	£9,860,000	£17,437,000	£99,585,000
Total Staying (%)		31%	12%	30%	10%	18%	100%
Total Day Visitors		£0	£50,612,000	£81,610,000	£25,234,000	£34,120,000	£191,576,000
Total Day Visitors		0%	26%	43%	13%	18%	100%
Total	**2021**	**£31,042,000**	**£62,403,000**	**£111,065,000**	**£35,094,000**	**£51,557,000**	**£291,161,000**
%		**11%**	**21%**	**38%**	**12%**	**18%**	**100%**
Comparison	**2020**	**£18,490,000**	**£42,096,000**	**£73,478,000**	**£23,120,000**	**£33,478,000**	**£190,662,000**
Difference		**68%**	**48%**	**51%**	**52%**	**54%**	**53%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£7,856,000	£599,765	£3,363,558	£16,230,000	£28,049,323

Spend on second homes is assumed to be an average of £2,100 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,100 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 £2,100. 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

Direct Turnover Derived From Trip Expenditure

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

		Staying Visitor	Day Visitors	Total
Accommodation		£31,631,000	£1,632,000	£33,263,000
Retail		£11,674,000	£50,105,000	£61,779,000
Catering		£28,571,000	£79,161,000	£107,732,000
Attractions		£10,272,000	£26,556,000	£36,828,000
Transport		£10,462,000	£20,472,000	£30,934,000
Non-trip spend		£28,049,323	£0	£28,049,323
Total Direct	**2021**	**£120,659,323**	**£177,926,000**	**£298,585,323**
Comparison	**2020**	**£69,564,241**	**£122,890,000**	**£192,454,241**
Difference		**73%**	**45%**	**55%**

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		£18,103,000	£24,650,000	£42,753,000
Non trip spending		£5,610,000	£0	£5,610,000
Income induced		£14,500,000	£3,773,000	£18,273,000
Total	**2021**	**£38,213,000**	**£28,423,000**	**£66,636,000**
Comparison	**2020**	**£24,832,000**	**£20,053,000**	**£44,885,000**
Difference		**54%**	**42%**	**48%**

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		£120,659,323	£177,926,000	£298,585,323
Indirect		£38,213,000	£28,423,000	£66,636,000
Total Value	**2021**	**£158,872,323**	**£206,349,000**	**£365,221,323**
Comparison	**2020**	**£94,396,241**	**£142,943,000**	**£237,339,241**
Difference		**68%**	**44%**	**54%**

Employment

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

Direct employment

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Accommodation		708	32%	37	1%	744	14%
Retailing		130	6%	559	19%	689	13%
Catering		582	26%	1,612	55%	2,193	42%
Entertainment		219	10%	566	19%	785	15%
Transport		88	4%	172	6%	260	5%
Non-trip spend		519	23%	0	0%	519	10%
Total FTE	**2021**	**2,246**		**2,945**		**5,192**	
Comparison	**2020**	**1,805**		**3,050**		**4,855**	
Difference		**24%**		**-3%**		**7%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Accommodation		1,048	33%	54	1%	1,102	15%
Retailing		195	6%	839	19%	1,034	14%
Catering		873	28%	2,418	56%	3,290	44%
Entertainment		309	10%	798	18%	1,107	15%
Transport		124	4%	242	6%	366	5%
Non-trip spend		592	19%	0	0%	592	8%
Total Actual	**2021**	**3,140**		**4,351**		**7,491**	
Comparison	**2020**	**2,569**		**4,505**		**7,075**	
Difference		**22%**		**-3%**		**6%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitor	Day Visitors	Total
Indirect jobs		439	456	896
Induced jobs		269	70	338
Total FTE	**2021**	**708**	**526**	**1,234**
Comparison	**2020**	**460**	**371**	**831**
Difference		**54%**	**42%**	**48%**

Estimated actual jobs				
		Staying Visitor	Day Visitors	Total
Indirect jobs		501	520	1,021
Induced jobs		306	80	386
Total Actual	**2021**	**807**	**600**	**1,407**
Comparison	**2020**	**524**	**423**	**948**
Difference		**54%**	**42%**	**48%**

Total Jobs

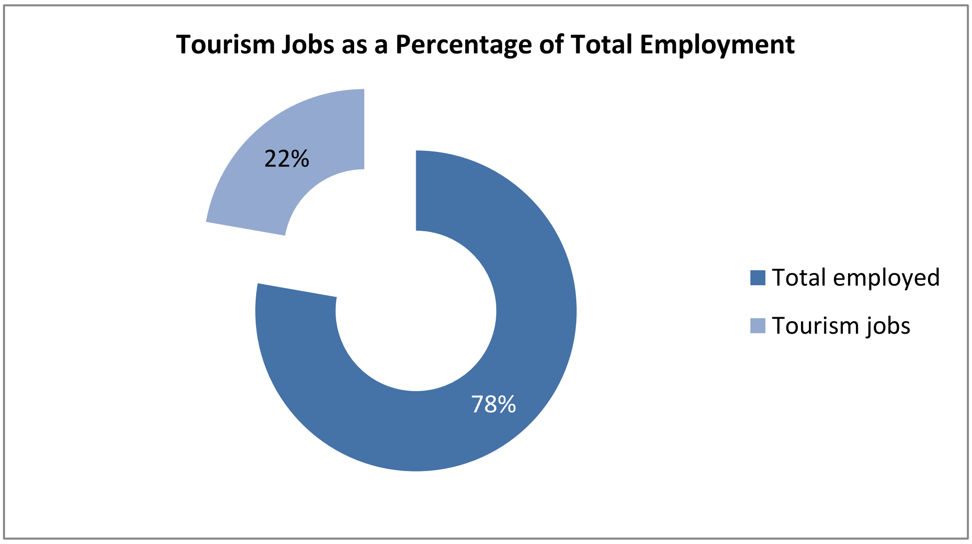
Actual jobs are estimated from surveys of relevant businesses at locations in England and take account of part time and seasonal working.

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Direct		2,246	76%	2,945	85%	5,192	81%
Indirect		439	15%	456	13%	896	14%
Induced		269	9%	70	2%	338	5%
Total FTE	**2021**	**2,954**		**3,472**		**6,426**	
Comparison	**2020**	**2,265**		**3,421**		**5,686**	
Difference		**30%**		**1%**		**13%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Direct		3,140	80%	4,351	88%	7,491	84%
Indirect		501	13%	520	11%	1,021	11%
Induced		306	8%	80	2%	386	4%
Total Actual	**2021**	**3,947**		**4,951**		**8,898**	
Comparison	**2020**	**3,094**		**4,929**		**8,022**	
Difference		**28%**		**0%**		**11%**	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day visitors	Total
Total employed		40,000	40,000	40,000
Tourism jobs		3,947	4,951	8,898
Proportion all jobs		**10%**	**12%**	**22%**
Comparison	**2020**	**3,094**	**4,929**	**8,022**
Difference		**28%**	**0%**	**11%**



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

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 ONS employment-related surveys;
- Selected data on the countryside and coast including, national designations and length of the coastline (where relevant).

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 model uses information from the survey to estimate the number of longer day trips (defined as those lasting at least 3 hours and involving travel of more than 20 miles) and irregular trips lasting more than 3 hours.

Impact of tourism expenditure
This section examines the impact of the tourism expenditure in terms of the direct, indirect and induced expenditure as well as an estimate of the actual jobs (both direct and indirect) supported by tourism expenditure in the district.

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.

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

Sergi Jarques
Director
Tel: 01206 392528
info@destinationresearch.co.uk
[redacted]

Appendix B - Economic Impact of Tourism – North Norfolk 2018 produced by Destination Research/Sergi Jarques

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delivering results : measuring what matters

Economic Impact of Tourism

North Norfolk - 2018

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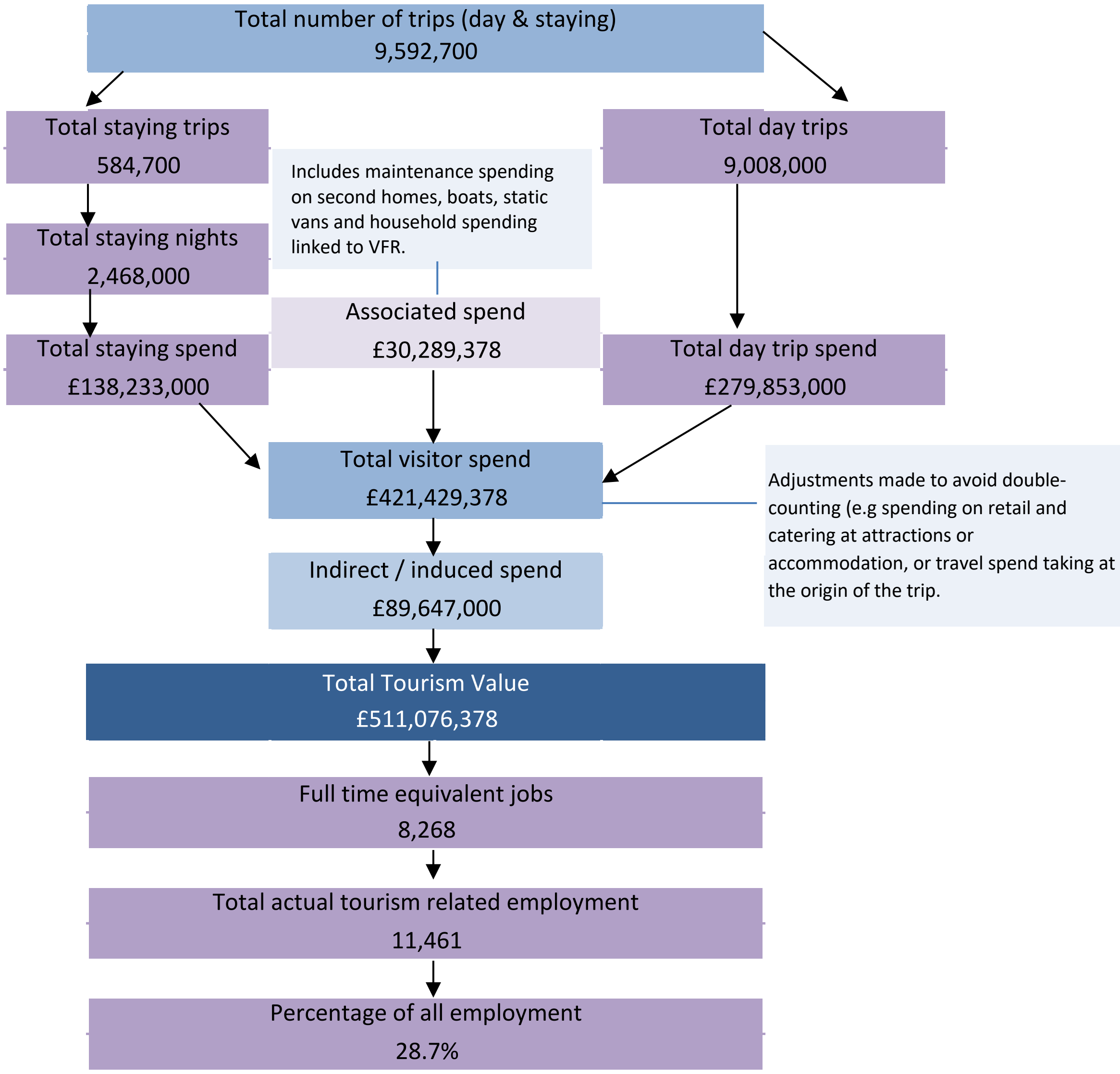
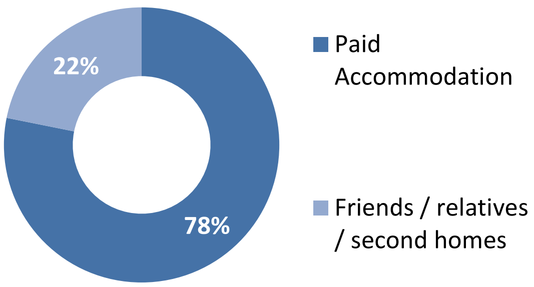


Economic Impact of Tourism – Year on year comparisons

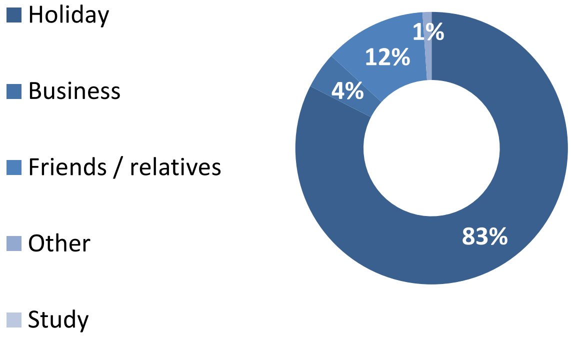
Day Trips	2017	2018	Annual variation
Day trips Volume	8,207,000	9,008,000	10%
Day trips Value	£268,710,000	£279,853,000	4%
Overnight trips			
Number of trip	620,700	584,700	-6%
Number of nights	2,644,000	2,468,000	-7%
Trip value	£145,523,000	£138,233,000	-5%
Total Value	**£505,109,250**	**£511,076,378**	**1%**
Actual Jobs	**11,352**	**11,461**	**1%**

	2017	2018	Variation
Average length stay (nights x trip)	4.26	4.22	-0.9%
Spend x overnight trip	£ 234.34	£ 236.30	0.8%
Spend x night	£ 55.04	£ 56.01	1.8%
Spend x day trip	£ 32.74	£ 31.07	-5.1%

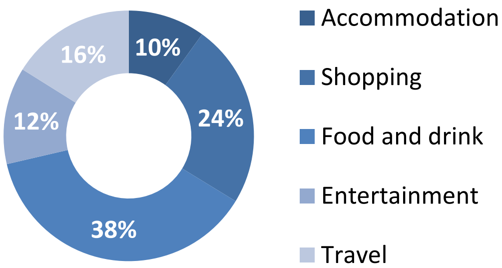
Type of Accommodation



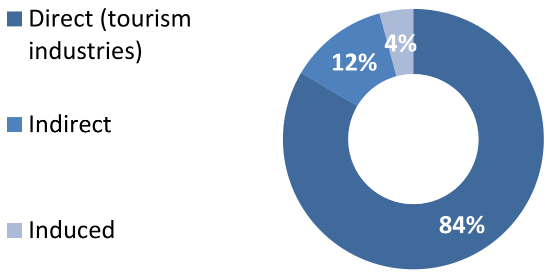
Trips by Purpose



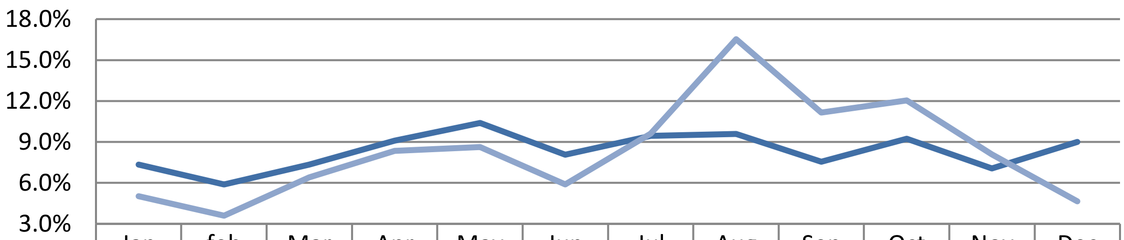
Breakdown of expenditure



Type of employment

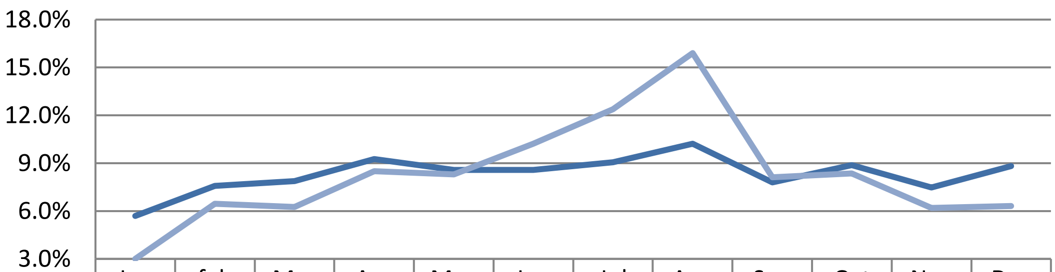


Seasonality - Day visitors (East of England)



	Jan	feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day trips	7.3%	5.9%	7.3%	9.1%	10.4%	8.1%	9.4%	9.6%	7.6%	9.2%	7.0%	9.0%
Day spend	5.0%	3.6%	6.4%	8.4%	8.6%	5.9%	9.6%	16.5%	11.2%	12.0%	8.1%	4.7%

Seasonality - Overnight visitors (East of England)



	Jan	feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Overnight trips	5.7%	7.6%	7.9%	9.3%	8.6%	8.6%	9.1%	10.2%	7.8%	8.9%	7.5%	8.8%
Overnight spend	3.0%	6.4%	6.3%	8.5%	8.3%	10.2%	12.4%	15.9%	8.1%	8.4%	6.2%	6.3%

Contextual analysis

INTRODUCTION

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2018 and provides comparative data against previously published data. The results are derived using the Cambridge Economic Impact Model under licence by Destination Research Ltd based on the latest data from national tourism surveys and regionally/locally based data.

CONTEXTUAL ANALYSIS

The three key surveys used to measure volume and expenditure from tourism trips are the GB Tourism Survey (for domestic overnight trips), the International Passenger Survey (IPS) for visits from overseas, and the BG Day Visitor Survey (GBDVS), which measures tourism day visits.

Domestic tourism

National Performance

In 2018, British residents took 97.4 million overnight trips in England, totalling 296 million nights away from home and expenditure of £19 billion, with an average trip length of 3 nights. The number of domestic trips to England was 3% lower than in 2017. Holiday Trips in England in 2018 decreased by 4% compared to 2017, with 45.2 million trips recorded.

Regional performance

The East of England region experienced a 12% drop in overnight trips during 2018. Bednights were down by 14% on 2017 and expenditure was also down by 8%. However, these results are on the back of a positive 2017 when the region experienced a 3% increase in overnight trips on the previous year. Bednights were up by 13% on 2016 and expenditure was also up by 13%.

The average spend per night in 2018 was £55.97 (up from £52.5 in 2017) and the spend per trip was £179.51 (up from £172.58 in 2017). The region received less visitors in 2018 than in the previous year. But importantly, their length of stay was unchanged from 2017 and spent more money during their visit, compared average expenditure levels in 2017.

The GB Tourism Survey data is a key driver for the Cambridge model. However, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends. As such, county and district level results relating to 2018 are an average of 2016, 2017 and 2018.

Visits from overseas

National Performance

The number of visits in 2018 fell 3% (from the 2017 record) to 37.9 million, after several years of growth since 2010. The value of spending also decreased by 7% (compared to 2017) to £22.90 billion. Average spend per visit was £604 in 2018, down from £625 per visit in 2017. The number of visitor nights spent in the UK fell by 7% in 2018 to 266 million, with the average number of nights per visit declining to 7.0 (from 7.3 in 2017).

Regional performance

The number of Overseas trips to the East of England in 2018 was down 9% at 2.2 million overnight trips (2.4 million in 2017). The total number of nights was down by 14% to 13.9 million. Spend was down by 13.6% to £704 million in 2018 (£815.2 million in 2017).

The International Passenger Survey (IPS) data is a key driver for the Cambridge model. However, as with the GBTS, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends.

Tourism Day Visits

National Performance

During 2017, UK residents took a total of 1,703 million Tourism Day Visits (down from 1,793 in 2017). Around £63.8 billion was spent during these trips, about 2.2% up on 2017.

The largest proportion of visits were taken to destinations in England (1,431 million visits or 84% of the total). The distribution of expenditure during visits broadly reflects this pattern, with a total value of day trips to England totalling £53.04 billion (83% of the total for GB).

Regional performance

During 2018, the volume tourism day visits in the East of England increased by 3.5% to 137.4 million. Spend was also up by 31% to £5.04 billion.

The Day Visitor Suvey (GBDVS) data is a key driver for the Cambridge model. However, as with the GBTS and IPS, it is not specifically designed to produce highly accurate results at sub-regional level. In order to improve the accuracy of results we have applied a 3-year rolling average to this data to help smooth out short term market fluctuations and highlight longer-term trends.

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	89,000	16%	1,600	6%	90,600	15%
Self catering	98,000	18%	3,800	14%	101,800	17%
Camping	68,000	12%	1,400	5%	69,400	12%
Static caravans	111,000	20%	600	2%	111,600	19%
Group/campus	32,000	6%	4,100	15%	36,100	6%
Paying guest	0	0%	0	0%	0	0%
Second homes	32,000	6%	1,400	5%	33,400	6%
Boat moorings	18,000	3%	0	0%	18,000	3%
Other	17,000	3%	1,200	4%	18,200	3%
Friends & relatives	94,000	17%	12,600	47%	106,600	18%
Total 2018	**558,000**		**27,000**		**585,000**	
Comparison 2017	**592,000**		**29,000**		**621,000**	
Difference	**-6%**		**-7%**		**-6%**	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	242,000	11%	7,000	3%	249,000	10%
Self catering	363,000	16%	79,000	30%	442,000	18%
Camping	319,000	14%	6,000	2%	325,000	13%
Static caravans	577,000	26%	2,000	1%	579,000	23%
Group/campus	78,000	4%	71,000	27%	149,000	6%
Paying guest	0	0%	0	0%	0	0%
Second homes	132,000	6%	8,000	3%	140,000	6%
Boat moorings	82,000	4%	0	0%	82,000	3%
Other	102,000	5%	3,000	1%	105,000	4%
Friends & relatives	312,000	14%	86,000	33%	398,000	16%
Total 2018	**2,208,000**		**260,000**		**2,468,000**	
Comparison 2017	**2,348,000**		**296,000**		**2,644,000**	
Difference	**-6%**		**-12%**		**-7%**	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£24,895,000	20%	£604,000	4%	£25,499,000	18%
Self catering	£24,774,000	20%	£4,980,000	33%	£29,754,000	22%
Camping	£22,083,000	18%	£296,000	2%	£22,379,000	16%
Static caravans	£26,802,000	22%	£170,000	1%	£26,972,000	20%
Group/campus	£5,203,000	4%	£4,051,000	27%	£9,254,000	7%
Paying guest	£0	0%	£0	0%	£0	0%
Second homes	£2,876,000	2%	£729,000	5%	£3,605,000	3%
Boat moorings	£3,108,000	3%	£0	0%	£3,108,000	2%
Other	£5,449,000	4%	£157,000	1%	£5,606,000	4%
Friends & relatives	£8,093,000	7%	£3,965,000	27%	£12,058,000	9%
Total 2018	**£123,283,000**		**£14,950,000**		**£138,233,000**	
Comparison 2017	**£128,362,000**		**£17,161,000**		**£145,523,000**	
Difference	**-4%**		**-13%**		**-5%**	

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

Trips by Purpose

		UK		Overseas		Total	
Holiday		471,000	84%	12,300	46%	483,300	83%
Business		24,000	4%	1,300	5%	25,300	4%
Friends & relatives		59,000	11%	11,800	44%	70,800	12%
Other		5,000	1%	1,300	5%	6,300	1%
Study		0	0%	0	0%	0	0%
Total	**2018**	**558,000**		**26,700**		**584,700**	
Comparison	**2017**	**592,000**		**28,700**		**620,700**	
Difference		**-6%**		**-7%**		**-6%**	

Nights by Purpose

		UK		Overseas		Total	
Holiday		1,882,000	85%	101,000	39%	1,983,000	80%
Business		75,000	3%	10,000	4%	85,000	3%
Friends & relatives		237,000	11%	138,000	53%	375,000	15%
Other		14,000	1%	12,000	5%	26,000	1%
Study		0	0%	0	0%	0	0%
Total	**2018**	**2,208,000**		**260,000**		**2,468,000**	
Comparison	**2017**	**2,348,000**		**296,000**		**2,644,000**	
Difference		**-6%**		**-12%**		**-7%**	

Spend by Purpose

		UK		Overseas		Total	
Holiday		£107,487,000	87%	£7,064,000	47%	£114,551,000	83%
Business		£6,418,000	5%	£732,000	5%	£7,150,000	5%
Friends & relatives		£8,083,000	7%	£6,396,000	43%	£14,479,000	10%
Other		£1,295,000	1%	£758,000	5%	£2,053,000	1%
Study		£0	0%	£0	0%	£0	0%
Total	**2018**	**£123,283,000**		**£14,950,000**		**£138,233,000**	
Comparison	**2017**	**£128,362,000**		**£17,161,000**		**£145,523,000**	
Difference		**-4%**		**-13%**		**-5%**	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

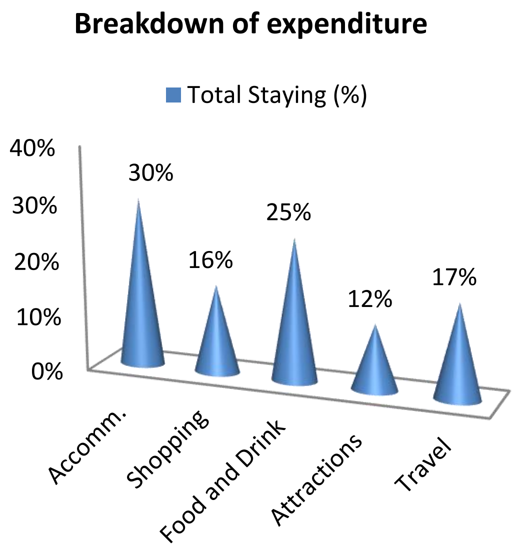
		Trips	Spend
Urban visits		3,302,000	£118,421,000
Countryside visits		3,489,000	£103,036,000
Coastal visits		2,217,000	£58,396,000
Total	**2018**	**9,008,000**	**£279,853,000**
Comparison	**2017**	**8,207,000**	**£268,710,000**
Difference		**10%**	**4%**

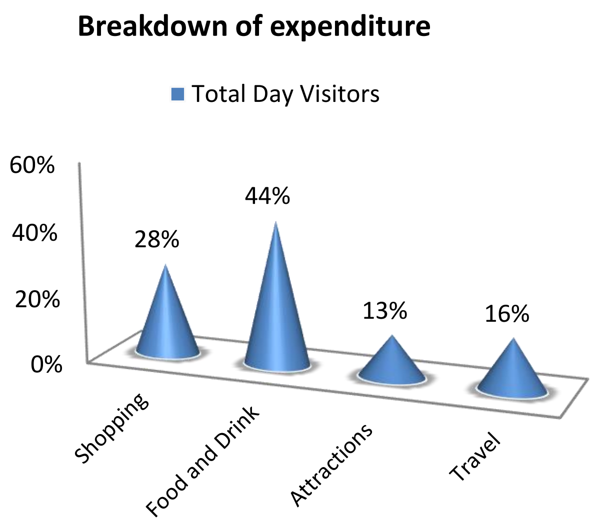
Value of Tourism

Expenditure Associated with Trips:

Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£37,664,000	£17,368,000	£31,711,000	£14,683,000	£21,858,000	£123,284,000
Overseas tourists	£3,994,000	£4,430,000	£3,495,000	£1,497,000	£1,535,000	£14,951,000
Total Staying	£41,658,000	£21,798,000	£35,206,000	£16,180,000	£23,393,000	£138,235,000
Total Staying (%)	30%	16%	25%	12%	17%	100%
Total Day Visitors	£0	£77,538,000	£122,202,000	£36,139,000	£43,974,000	£279,853,000
Total Day Visitors	0%	28%	44%	13%	16%	100%
Total 2018	**£41,658,000**	**£99,336,000**	**£157,408,000**	**£52,319,000**	**£67,367,000**	**£418,088,000**
%	**10%**	**24%**	**38%**	**13%**	**16%**	**100%**
Comparison 2017	**£44,166,000**	**£97,465,000**	**£154,364,000**	**£51,869,000**	**£66,368,000**	**£414,232,000**
Difference	**-6%**	**2%**	**2%**	**1%**	**2%**	**1%**





Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	**Boats**	**Static vans**	**Friends & relatives**	**Total**
£10,071,000	£768,930	£4,204,448	£15,245,000	£30,289,378

Spend on second homes is assumed to be an average of £2,100 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,100 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 £2,100. 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

Direct Turnover Derived From Trip Expenditure

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

		Staying Visitor	Day Visitors	Total
Accommodation		£42,362,000	£2,444,000	£44,806,000
Retail		£21,580,000	£76,763,000	£98,343,000
Catering		£34,149,000	£118,536,000	£152,685,000
Attractions		£16,749,000	£38,137,000	£54,886,000
Transport		£14,036,000	£26,384,000	£40,420,000
Non-trip spend		£30,289,378	£0	£30,289,378
Total Direct	**2018**	**£159,165,378**	**£262,264,000**	**£421,429,378**
Comparison	**2017**	**£163,905,250**	**£251,781,000**	**£415,686,250**
Difference		**-3%**	**4%**	**1%**

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		£24,318,000	£36,565,000	£60,883,000
Non trip spending		£6,058,000	£0	£6,058,000
Income induced		£17,532,000	£5,174,000	£22,706,000
Total	**2018**	**£47,908,000**	**£41,739,000**	**£89,647,000**
Comparison	**2017**	**£49,318,000**	**£40,105,000**	**£89,423,000**
Difference		**-3%**	**4%**	**0%**

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		£159,165,378	£262,264,000	£421,429,378
Indirect		£47,908,000	£41,739,000	£89,647,000
Total Value	**2018**	**£207,073,378**	**£304,003,000**	**£511,076,378**
Comparison	**2017**	**£213,223,250**	**£291,886,000**	**£505,109,250**
Difference		**-3%**	**4%**	**1%**

Employment

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

Direct employment

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Accommodation		853	32%	49	1%	902	14%
Retailing		217	8%	771	20%	988	15%
Catering		626	23%	2,172	55%	2,798	42%
Entertainment		321	12%	732	19%	1,053	16%
Transport		106	4%	199	5%	305	5%
Non-trip spend		561	21%	0	0%	561	8%
Total FTE	**2018**	**2,684**		**3,923**		**6,607**	
Comparison	**2017**	**2,759**		**3,768**		**6,528**	
Difference		**-3%**		**4%**		**1%**	

Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Accommodation		1,263	34%	73	1%	1,336	14%
Retailing		325	9%	1,156	20%	1,482	15%
Catering		939	25%	3,258	56%	4,197	44%
Entertainment		453	12%	1,032	18%	1,485	16%
Transport		149	4%	281	5%	430	4%
Non-trip spend		639	17%	0	0%	639	7%
Total Actual	**2018**	**3,769**		**5,800**		**9,569**	
Comparison	**2017**	**3,894**		**5,571**		**9,465**	
Difference		**-3%**		**4%**		**1%**	

Indirect & Induced Employment

Full time equivalent (FTE)				
		Staying Visitor	Day Visitors	Total
Indirect jobs		563	677	1,240
Induced jobs		325	96	420
Total FTE	**2018**	**887**	**773**	**1,660**
Comparison	**2017**	**913**	**743**	**1,656**
Difference		**-3%**	**4%**	**0%**

Estimated actual jobs				
		Staying Visitor	Day Visitors	Total
Indirect jobs		641	772	1,413
Induced jobs		370	109	479
Total Actual	**2018**	**1,011**	**881**	**1,893**
Comparison	**2017**	**1,041**	**847**	**1,888**
Difference		**-3%**	**4%**	**0%**

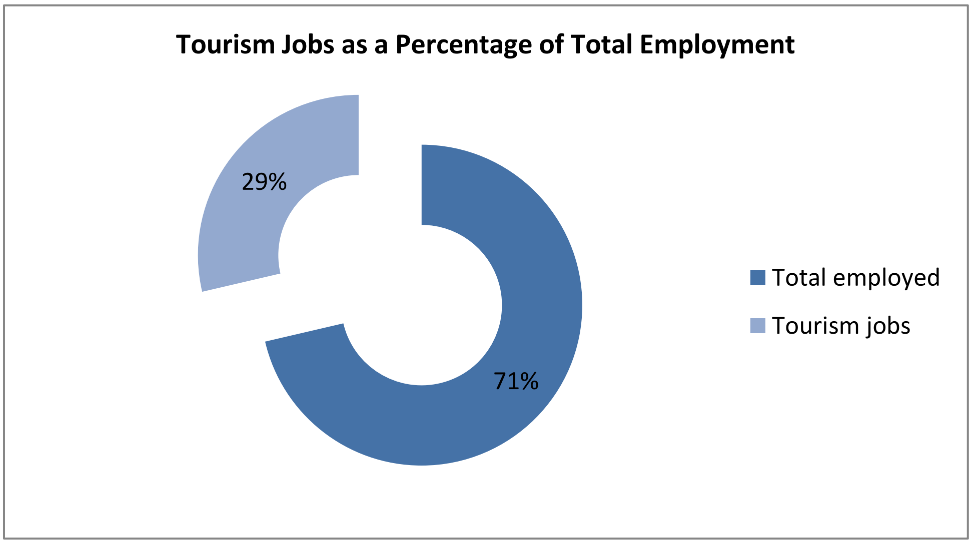
Total Jobs

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

Full time equivalent (FTE)							
		Staying Visitor		Day Visitor		Total	
Direct		2,684	75%	3,923	84%	6,607	80%
Indirect		563	16%	677	14%	1,240	15%
Induced		325	9%	96	2%	420	5%
Total FTE	**2018**	**3,571**		**4,696**		**8,268**	
Comparison	**2017**	**3,673**		**4,511**		**8,184**	
Difference		**-3%**		**4%**		**1%**	
Estimated actual jobs							
		Staying Visitor		Day Visitor		Total	
Direct		3,769	79%	5,800	87%	9,569	83%
Indirect		641	13%	772	12%	1,413	12%
Induced		370	8%	109	2%	479	4%
Total Actual	**2018**	**4,780**		**6,681**		**11,461**	
Comparison	**2017**	**4,935**		**6,417**		**11,352**	
Difference		**-3%**		**4%**		**1%**	

Tourism Jobs as a Percentage of Total Employment

		Staying Visitor	Day visitors	Total
Total employed		40,000	40,000	40,000
Tourism jobs		4,780	6,681	11,461
Proportion all jobs		**12%**	**17%**	**29%**
Comparison	**2017**	**4,935**	**6,417**	**11,352**
Difference		**-3%**	**4%**	**1%**



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 changes 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 ;
- Mid- 2018 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 and coast including, national designations and length of the coastline.

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 model uses information from the survey to estimate the number of longer day trips (defined as those lasting at least 3 hours and involving travel of more than 20 miles) and irregular trips lasting more than 3 hours.

Impact of tourism expenditure
This section examines the impact of the tourism expenditure in terms of the direct, indirect and induced expenditure as well as an estimate of the actual jobs (both direct and indirect) supported by tourism expenditure in the district.

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.

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

Sergi Jarques
Director
Tel: 01206 392528
info@destinationresearch.co.uk
[redacted]