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VISIT HERTS

Economic Impact of Tourism

Hertsmere - 2015 Results

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Introduction

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.

In Hertfordshire, county level reports were not carried out on a regular basis and as such, we recommend that the research reports based on 2015 data are used as the benchmark for future, more regular county wide reporting. This will allow for more robust comparisons and evaluations.

Contextual Analysis

Domestic tourism

In 2015, British residents took 102.7 million overnight trips in England, totalling 300 million nights away from home, with an expenditure of £19.6 billion. £191 was spent per trip, and with an average trip length of 2.92 nights, the average spend per night was £65.

The East of England region experienced an increase of 8% in overnight trips during 2015. Bednights were down 5% on 2014 and expenditure was up by 2%. This resulted in a decrease in the average length of trips (the number of night per trip) from 3.3 nights per trip in 2014 to 2.9 in 2015. The average spend per night was up from £53.4 per night in 2014 to £57.7 in 2015. The region received more visitors in 2015 than in the previous year. However, those who did visit stayed for shorter periods of time, meaning that overall trip expenditure per trip was down from £178.7 in 2014 to £167.5 in 2015.

However, please note that the Cambridge Model uses three year rolling averages to reduce some of the more extreme fluctuations which are due to small sample sizes and high margins or error.



Visits from overseas

The number of visits to the UK in 2015 grew 5% to a record 36.1 million, after several years of growth since 2010. Average spend per visit was £611 in 2015, down from the peak of £650 per visit in 2013 and reflecting the relative strength of sterling in 2015. The number of visitor nights spent in the UK increased by 3% in 2015 to 273 million, with the average number of nights per visit standing at 7.6.

Overseas trips to the East of England region were 4% up on 2014 to reach 2.2 million overnight trips. The total number of nights was down by 1% to reach 16.7 million in 2015. Spend was also down by less than 1% to £960 million in 2015.

The International Passenger Survey (IPS) is conducted by Office for National Statistics and is based on face- to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland. The number of interviews conducted in England in 2015 was around 35,000. This large sample size allows reliable estimates to be produced for various groups of passengers despite the low proportion of travellers interviewed. The IPS provides headline figures, based on the county or unitary authority, for the volume and value of overseas trips to the UK. The sample for East of England was 2,450 interviews.

Day visits

During 2015, GB residents took a total of 1,298 million Tourism Day Visits to destinations across England, down from 1,345 in 2014. The value of these trips increased by +3% to £46.4 billion. The volume and value of Tourism Day Visits in the East of England decreased between 2014 and 2015 from 130 million to 118 million with a 6% decrease in expenditure.

How accurate is the data?

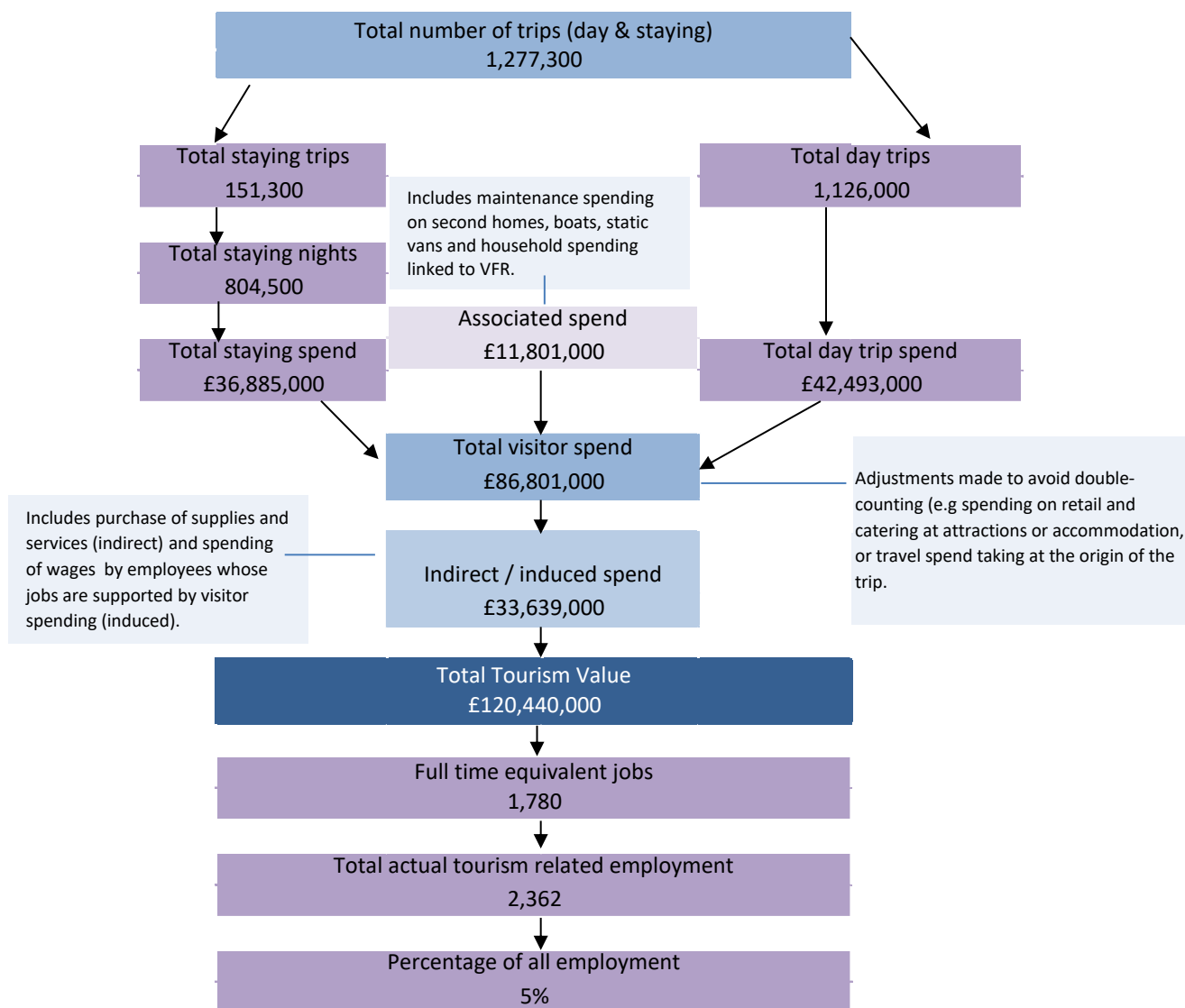
The Cambridge Model makes use of data from national surveys (GBTS, IPS, GBDVS). The regional data extracted from these national surveys must be interpreted with a degree of caution, as it has never been designed to be able to produce highly accurate results at regional level or be disaggregated to County level.

As with all models the outputs included in this report should be taken as indicative rather than definitive. Because of the data sources and modelling process involved in the production of the results, there will be a potentially large margin of error associated with individual figures, with small numbers being particularly prone to such errors. We have applied a 3-year rolling average to the survey data to help smooth out short term market fluctuations and highlight longer-term trends. We also combine the demand data with supply-side results (occupancy levels, visits to visitor attractions). Whenever possible we use locally sourced data to further improve the accuracy of the results.



Economic Impact of Tourism – Headline Figures

Hertsmere - 2015 Results



Economic Impact of Tourism – Year on year comparisons

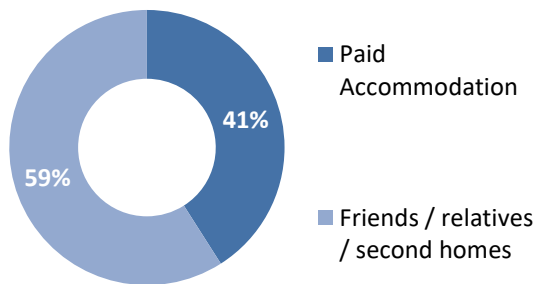
Hertsmere

	2014	2015	Annual variation
Day Trips			
Day trips Volume	1,171,000	1,126,000	-3.8%
Day trips Value	£40,922,000	£42,493,000	3.8%
Overnight trips			
Number of trip	145,800	151,300	3.8%
Number of nights	752,900	804,500	6.9%
Trip value	£38,552,000	£36,885,000	-4.3%
Total Value	£120,103,000	£120,440,000	0.3%
Actual Jobs	2,347	2,362	0.6%

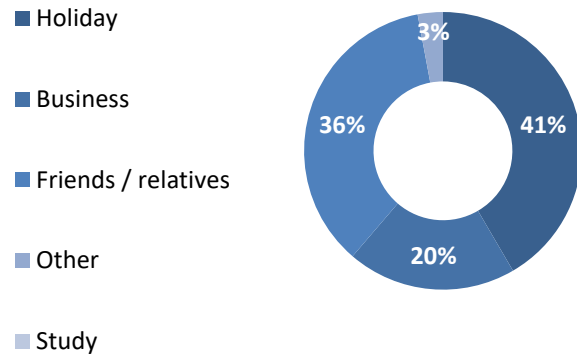
Hertsmere	2014	2015	Variation
Average length stay (nights x trip)	5.16	5.32	3.0%
Spend x overnight trip	£ 264.42	£ 243.79	-7.8%
Spend x night	£ 51.20	£ 45.85	-10.5%
Spend x day trip	£ 34.95	£ 37.74	8.0%



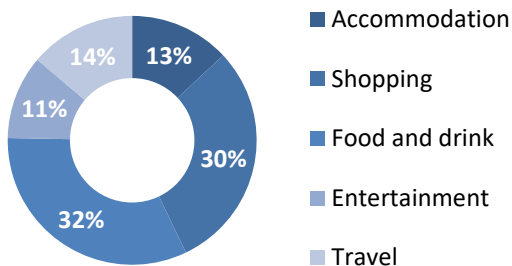
Trips by type of accommodation



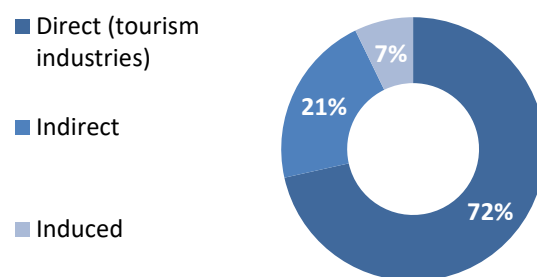
Trips by Purpose



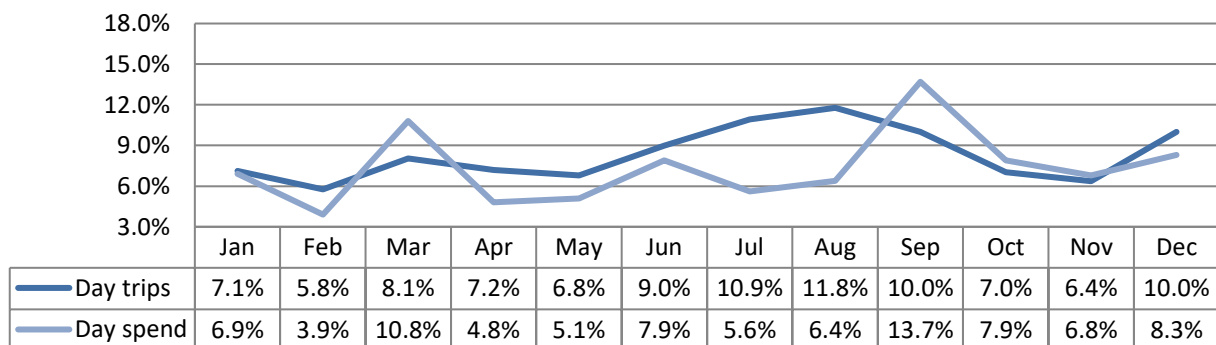
Breakdown of expenditure



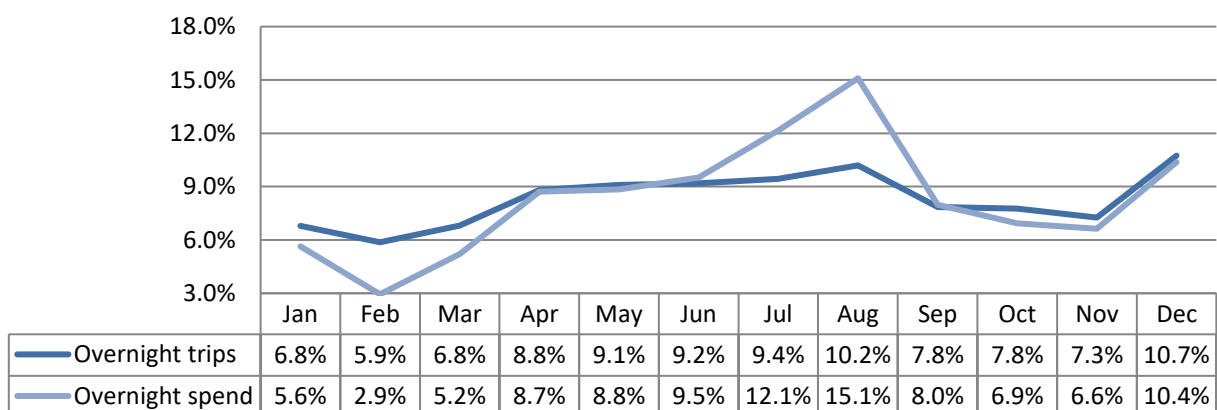
Type of employment



Seasonality - Day visitors (County level)



Seasonality - Overnight visitors (County level)



Volume of Tourism



Staying visits in the county context

Hertsmere - 2015 Results

Staying trips in the county context 2015

District	Domestic trips ('000)	Overseas trips ('000)
North Herts	142	44
Stevenage	113	33
East Herts	180	56
Broxbourne	102	30
Welwyn Hatfield	143	43
St Albans	193	61
Dacorum	205	58
Three Rivers	70	24
Watford	147	44
Hertsmere	116	35

Staying nights in the county context 2015

District	Domestic nights ('000)	Overseas nights ('000)
North Herts	688	329
Stevenage	485	204
East Herts	864	507
Broxbourne	527	246
Welwyn Hatfield	681	679
St Albans	825	450
Dacorum	903	418
Three Rivers	408	205
Watford	585	272
Hertsmere	540	265

Expenditure in the county context 2015

District	Domestic spend (millions)	Overseas spend (millions)
North Herts	£27	£17
Stevenage	£23	£13
East Herts	£35	£30
Broxbourne	£19	£12
Welwyn Hatfield	£30	£37
St Albans	£39	£26
Dacorum	£43	£25
Three Rivers	£12	£8
Watford	£30	£18
Hertsmere	£23	£14



Staying Visitors - Accommodation Type

Hertsmere - 2015 Results

Trips by Accommodation

	UK		Overseas		Total	
Serviced	40,000	34%	10,100	29%	50,100	33%
Self catering	0	0%	300	1%	300	0%
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%	0	0%	0	0%
Second homes	1,000	1%	700	2%	1,700	1%
Boat moorings	0	0%	0	0%	0	0%
Other	8,000	7%	2,900	8%	10,900	7%
Friends & relatives	67,000	58%	21,300	60%	88,300	58%
Total 2015	116,000		35,300		151,300	
Comparison 2014	106,000		39,800		145,800	
Difference	9%		-11%		4%	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	84,000	16%	27,400	10%	111,400	14%
Self catering	2,000	0%	18,900	7%	20,900	3%
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%	0	0%	0	0%
Second homes	3,000	1%	22,300	8%	25,300	3%
Boat moorings	0	0%	0	0%	0	0%
Other	44,000	8%	3,800	1%	47,800	6%
Friends & relatives	407,000	75%	192,100	73%	599,100	74%
Total 2015	540,000		264,500		804,500	
Comparison 2014	495,000		257,900		752,900	
Difference	9%		3%		7%	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£9,401,000	42%	£4,791,000	33%	£14,192,000	38%
Self catering	£73,000	0%	£1,523,000	11%	£1,596,000	4%
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%	£0	0%	£0	0%
Second homes	£199,000	1%	£364,000	3%	£563,000	2%
Boat moorings	£0	0%	£0	0%	£0	0%
Other	£1,798,000	8%	£564,000	4%	£2,362,000	6%
Friends & relatives	£11,109,000	49%	£7,064,000	49%	£18,173,000	49%
Total 2015	£22,579,000		£14,306,000		£36,885,000	
Comparison 2014	£22,475,000		£16,077,000		£38,552,000	
Difference	0%		-11%		-4%	

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

Hertsmere - 2015 Results

Trips by Purpose

		UK		Overseas		Total	
Holiday		54,000	47%	8,500	24%	62,500	41%
Business		23,000	20%	6,600	19%	29,600	20%
Friends & relatives		35,000	30%	18,800	53%	53,800	36%
Other		3,000	3%	1,400	4%	4,400	3%
Study		0	0%	0	0%	0	0%
Total	2015	116,000		35,300		151,300	
Comparison	2014	106,000		39,800		145,800	
Difference		9%		-11%		4%	

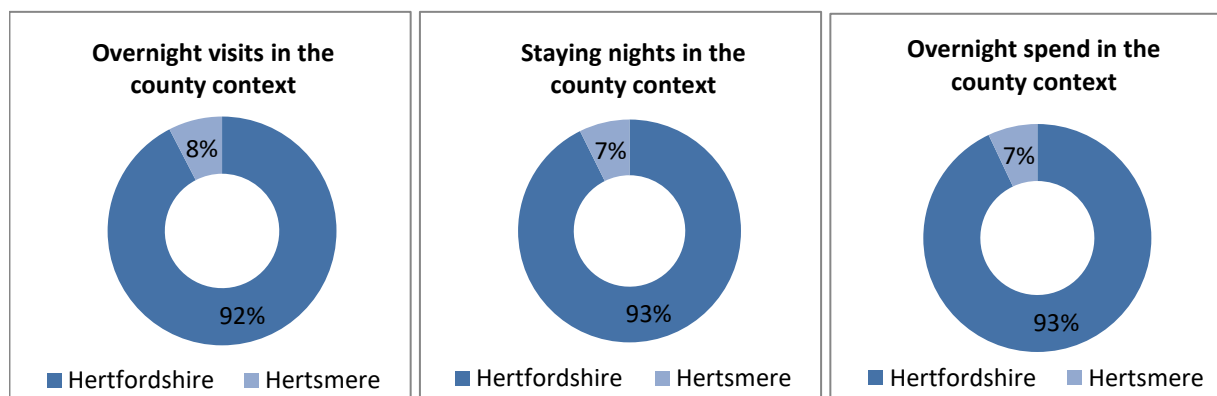
Nights by Purpose

		UK		Overseas		Total	
Holiday		270,000	50%	51,700	20%	321,700	40%
Business		61,000	11%	23,200	9%	84,200	10%
Friends & relatives		198,000	37%	162,200	61%	360,200	45%
Other		10,000	2%	27,400	10%	37,400	5%
Study		0	0%	0	0%	0	0%
Total	2015	540,000		264,500		804,500	
Comparison	2014	495,000		257,900		752,900	
Difference		9%		3%		7%	

Spend by Purpose

		UK		Overseas		Total	
Holiday		£8,006,000	35%	£3,082,000	22%	£11,088,000	30%
Business		£6,356,000	28%	£3,278,000	23%	£9,634,000	26%
Friends & relatives		£7,866,000	35%	£6,926,000	48%	£14,792,000	40%
Other		£351,000	2%	£1,020,000	7%	£1,371,000	4%
Study		£0	0%	£0	0%	£0	0%
Total	2015	£22,579,000		£14,306,000		£36,885,000	
Comparison	2014	£22,475,000		£16,077,000		£38,552,000	
Difference		0%		-11%		-4%	

Proportion of staying visits in the county context



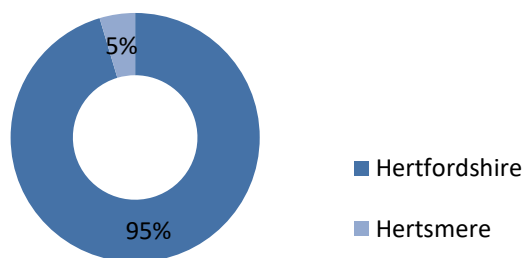
Total Volume and Value of Day Trips

		Trips	Spend
Urban visits		904,000	£35,200,000
Countryside visits		222,000	£7,293,000
Coastal visits		0	£0
Total	2015	1,126,000	£42,493,000
Comparison	2014	1,171,000	£40,922,000
Difference		-4%	4%

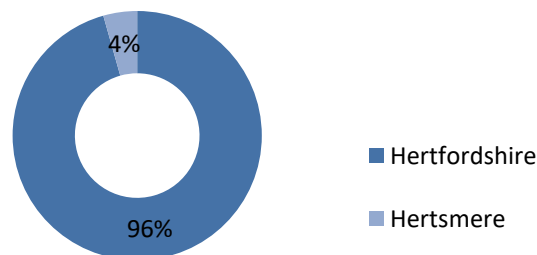
Day Visitors in the county context

District	Day Visits (millions)	Day visit Spend (millions)
North Herts	2.3	£91.4
Stevenage	1.5	£56.8
East Herts	3.6	£138.6
Broxbourne	1.0	£39.6
Welwyn Hatfield	1.5	£59.9
St Albans	1.6	£61.8
Dacorum	2.8	£109.6
Three Rivers	2.8	£112.2
Watford	1.5	£58.6
Hertsmere	1.1	£42.5

Tourism day visits in the county context



Tourism day spend in the county context



Value of Tourism



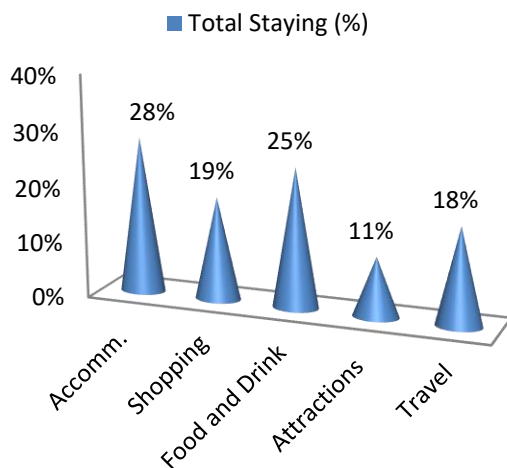
Expenditure Associated with Trips

Hertsmere - 2015 Results

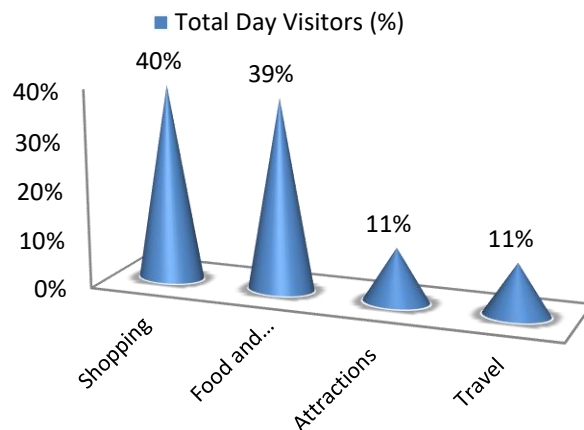
Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£6,370,000	£2,841,000	£5,979,000	£2,394,000	£4,994,000	£22,578,000
Overseas tourists	£3,979,000	£3,990,000	£3,278,000	£1,578,000	£1,481,000	£14,306,000
Total Staying	£10,349,000	£6,831,000	£9,257,000	£3,972,000	£6,475,000	£36,884,000
Total Staying (%)	28%	19%	25%	11%	18%	100%
Total Day Visitors	£0	£16,869,000	£16,455,000	£4,700,000	£4,469,000	£42,493,000
Total Day Visitors (%)	0%	40%	39%	11%	11%	100%
Total 2015	£10,349,000	£23,700,000	£25,712,000	£8,672,000	£10,944,000	£79,377,000
%	13%	30%	32%	11%	14%	100%
Comparison 2014	£11,455,000	£23,260,000	£25,366,000	£8,541,000	£10,851,000	£79,473,000
Difference	-10%	2%	1%	2%	1%	0%

Breakdown of expenditure



Breakdown of expenditure



Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	Boats	Static vans	Friends & relatives	Total
£195,000	£0	£0	£11,606,000	£11,801,000

Spend on second homes is assumed to be an average of £2,000 on rates, maintenance, and replacement of furniture and fittings. Spend on boats assumed to be an average of £2,000 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 £2,000. Additional spending is incurred by friends and relatives as a result of people coming to stay with them. A cost of £175 per visit has been assumed based on national research for social and personal visits.



Direct Turnover Derived From Trip

Hertsmere - 2015 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		£10,534,000	£329,000	£10,863,000
Retail		£6,762,000	£16,700,000	£23,462,000
Catering		£8,980,000	£15,962,000	£24,942,000
Attractions		£4,133,000	£5,033,000	£9,166,000
Transport		£3,885,000	£2,682,000	£6,567,000
Non-trip spend		£11,801,000	£0	£11,801,000
Total Direct	2015	£46,095,000	£40,706,000	£86,801,000
Comparison	2014	£47,214,000	£39,201,000	£86,415,000
Difference		-2%	4%	0%

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		£11,328,000	£11,319,000	£22,647,000
Non trip spending		£2,478,000	£0	£2,478,000
Income induced		£6,871,000	£1,643,000	£8,514,000
Total	2015	£20,677,000	£12,962,000	£33,639,000
Comparison	2014	£21,264,000	£12,424,000	£33,688,000
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		£46,095,000	£40,706,000	£86,801,000
Indirect		£20,677,000	£12,962,000	£33,639,000
Total Value	2015	£66,772,000	£53,668,000	£120,440,000
Comparison	2014	£68,478,000	£51,625,000	£120,103,000
Difference		-2%	4%	0%



Employment



Employment

Hertsmere - 2015 Results

The model generates estimates of full time equivalent jobs based on visitor spending. The total number of 'actual' jobs will be higher when part time and seasonal working is taken into account. Conversion of full time equivalent jobs into actual jobs relies on information from business surveys in the sectors receiving visitor spending.

Direct employment

Full time equivalent (FTE)						
	Staying Visitor		Day Visitor		Total	
Accommodation	182	27%	6	1%	187	16%
Retailing	55	8%	136	27%	191	16%
Catering	146	21%	260	51%	406	34%
Entertainment	71	10%	87	17%	158	13%
Transport	24	3%	16	3%	40	3%
Non-trip spend	207	30%	0	0%	207	17%
Total FTE 2015	685		505		1,190	
Comparison 2014	698		486		1,185	
Difference	-2%		4%		0%	
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Accommodation	269	29%	8	1%	277	16%
Retailing	83	9%	204	27%	287	17%
Catering	219	23%	390	52%	609	36%
Entertainment	100	11%	122	16%	222	13%
Transport	34	4%	23	3%	57	3%
Non-trip spend	236	25%	0	0%	236	14%
Total Actual 2015	941		748		1,689	
Comparison 2014	965		720		1,685	
Difference	-2%		4%		0%	

Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	242	199	441
Induced jobs	121	29	149
Total FTE 2015	363	227	590
Comparison 2014	367	214	581
Difference	-1%	6%	2%
Estimated actual jobs			
	Staying Visitor	Day Visitors	Total
Indirect jobs	276	226	503
Induced jobs	137	33	170
Total Actual 2015	414	259	673
Comparison 2014	418	244	662
Difference	-1%	6%	2%



Total Tourism Jobs

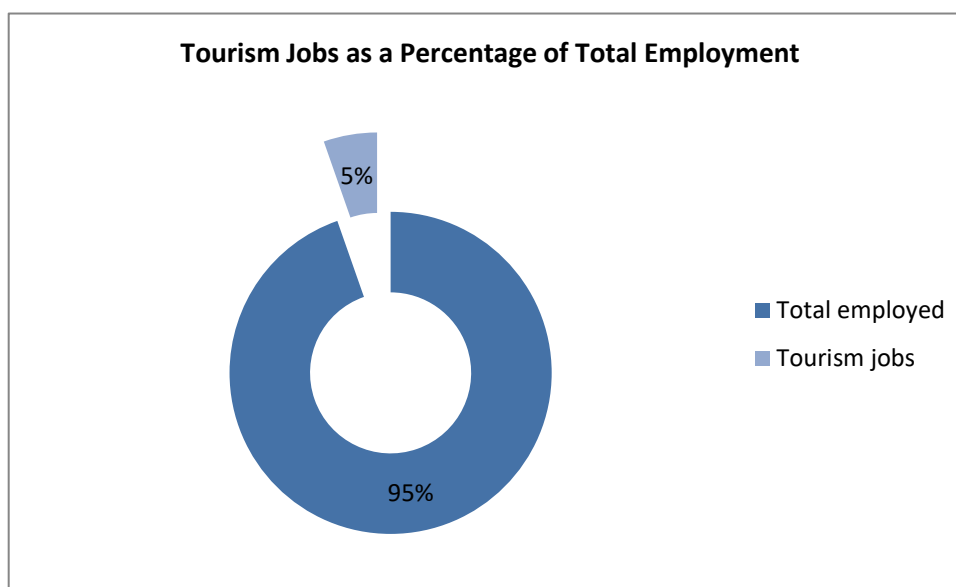
Hertsmere - 2015 Results

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	685	65%	505	69%	1,190	67%
Indirect	242	23%	199	27%	441	25%
Induced	121	12%	29	4%	149	8%
Total FTE 2015	1,048		732		1,780	
Comparison 2014	1,065		701		1,766	
Difference	-2%		5%		1%	
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Direct	941	69%	748	74%	1,689	72%
Indirect	276	20%	226	22%	503	21%
Induced	137	10%	33	3%	170	7%
Total Actual 2015	1,354		1,007		2,362	
Comparison 2014	1,383		965		2,347	
Difference	-2%		4%		1%	

Tourism Jobs as a Percentage of Total Employment

	Staying Visitor	Day visitors	Total
Total employed	44,000	44,000	44,000
Tourism jobs	1,354	1,007	2,362
Proportion all jobs	3%	2%	5%
Comparison 2014	1,383	965	2,347
Difference	-2%	4%	1%



The key 2015 results of the Economic Impact Assessment are:

1.3 million trips were undertaken in the area

1.1 million day trips

0.2 million overnight visits

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

£120 million - Total value of tourism

£87 million spent by tourists during their visit to the area

£7 million spent on average in the local economy each month.

£37 million generated by overnight visits

£42 million generated from day trips.

2,362 jobs supported, both for local residents from those living nearby.

1,689 tourism jobs directly supported

673 non-tourism related jobs supported linked to multiplier spend from tourism.

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



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 varies. 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. In some tables there may therefore 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- 2014 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 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.



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