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Economic Impact of Tourism

Hertfordshire - 2017 Results

December 2018

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## **Introduction**

### **INTRODUCTION**

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2017 and provides comparative data against the previously published data for Hertfordshire (2015).

Destination Research was commissioned by Visit Herts to produce 2017 results based on the latest data from national tourism surveys and regionally/locally based data. The results are derived using the Cambridge Economic Impact Model.

In its basic form, the model distributes regional activity as measured in national surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level. Whenever possible, results have been enhanced by building in additional local-level data gathered by the districts. See Appendix I for further details.

### **Domestic tourism**

#### **National Performance**

In 2017, British residents took 100.6 million overnight trips in England, totalling 299 million nights away from home, with an expenditure of £19.05 billion. £189.31 was spent per trip, and with an average trip length of 2.97 nights, the average spend per night was £63.62. The number of domestic trips was 2% up on 2015, and the amount spent was also up by 2%.

#### **Regional performance**

The East of England region experienced a 5% increase in overnight trips between 2015 and 2017. Bednights were up 1% on 2015 and expenditure was up by 4%. The region received more visitors in 2017 than in 2015 and visitors spent slightly more per night than in 2015. The average spend per night was up from £54.51 per night in 2015 to £56.15 in 2017.

#### **Domestic visits to Hertfordshire**

The domestic tourism results for Hertfordshire used in this model combine a mixture of supply and demand data. We do this because extracting county level data from national surveys can sometimes lead to inaccurate results due to low sample sizes. By combining the supply and demand results we estimate that trips to Hertfordshire were up by 1%, nights per trip were unchanged since 2015 and expenditure increased by 1%.

## **Visits from overseas**

As with domestic tourism, the Cambridge Model uses three year averages to estimate changes in overseas tourism to reduce some of the more extreme fluctuations which can be attributed to small sample sizes and high margins of error. At national level, the number of visits in 2017 grew by 10%, reaching 33 million. The number of visitor nights spent in the UK increased by 7% between 2015 and 2017 to reach 245.7 million, with the average number of nights per visit standing at 7.4.

Overseas trips to the East of England region were 11% up on 2015 to reach 2.3 million overnight trips. The total number of nights was up by 3% to reach 16.3 million in 2017. Spend was down by 7% compared to 2015 reaching £876 million.

Hertfordshire also experienced growth between 2015 and 2017. Trips were up 5%, nights per trip were also up (1%). However, expenditure was down by 4%.

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 2017 was around 35,628.

## **Tourism Day Visits**

### **National Performance**

During 2017, GB residents took a total of 1.5 billion tourism day trips to destinations in England. Around £51 billion was spent during these trips. At national level, the volume of day trips was down by 1% and the expenditure levels were unchanged between 2015 and 2017.

The volume and value of tourism day visits in the East of England increased by 12% between 2015 and 2017, from 118 million to 133 million. Expenditure levels were up by 9% to £3.9 billion in 2017.

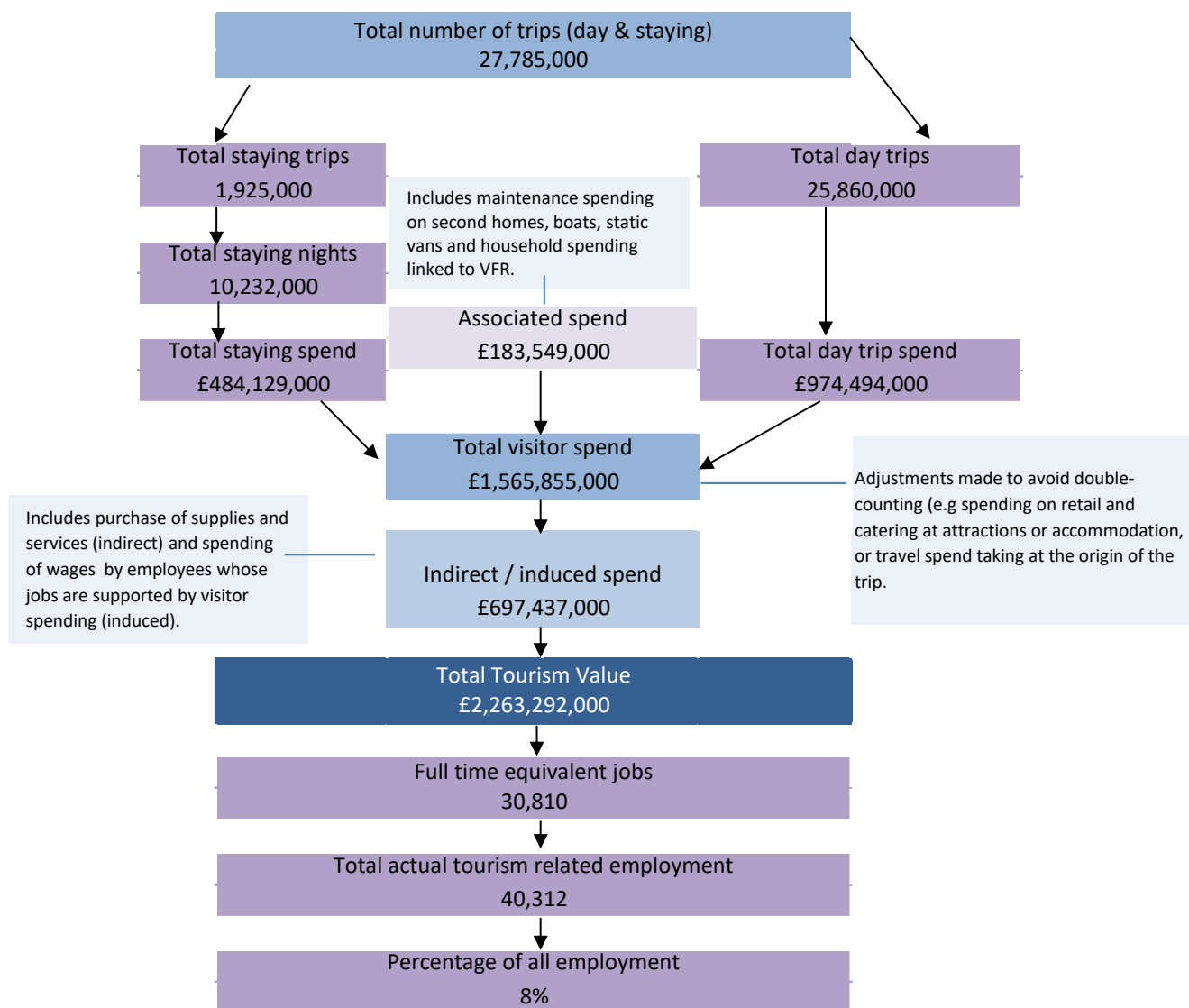
According to the GB Day Visitor Survey day trips in Hertfordshire were up by almost 30% between 2015 and 2017, with a 1% decrease in value for the same period. However, data from the Visits to Visitor Attractions Survey shows that the admissions to attractions was up by 3% between 2015 and 2017 and revenues were also up by 7%.

Based on these results the model assumes that the volume of day trips was up 11% between 2015 and 2017 and expenditure up by 5%.

*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 of error.*

## Economic Impact of Tourism – Headline Figures

## Hertfordshire - 2017 Results



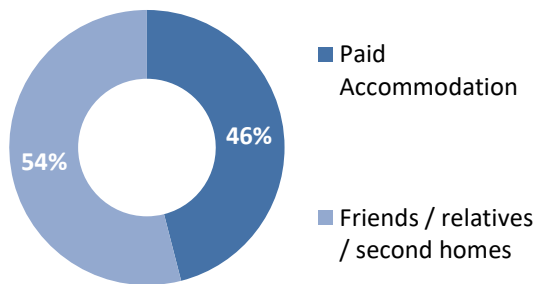
### Economic Impact of Tourism – Year on year comparisons

### Hertfordshire

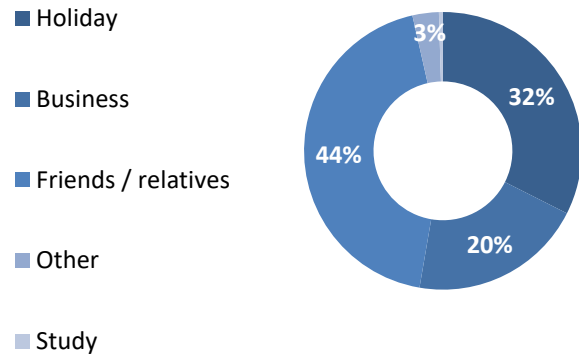
	2015	2017	Annual variation
<b>Day Trips</b>			
Day trips Volume	23,289,000	25,860,000	11%
Day trips Value	£926,406,000	£974,494,000	5%
<b>Overnight trips</b>			
Number of trips	1,840,000	1,925,000	5%
Number of nights	10,183,000	10,232,000	0%
Trip value	£488,117,000	£484,129,000	-1%
<b>Total Value</b>	<b>£2,131,497,000</b>	<b>£2,263,292,000</b>	<b>6%</b>
<b>Actual Jobs</b>	<b>37,862</b>	<b>40,312</b>	<b>6%</b>

Hertfordshire	2015	2017	Variation
Average length stay (nights x trip)	5.53	5.32	-4%
Spend x overnight trip	£ 265.28	£ 251.50	-5%
Spend x night	£ 47.93	£ 47.32	-1%
Spend x day trip	£ 39.78	£ 37.68	-5%

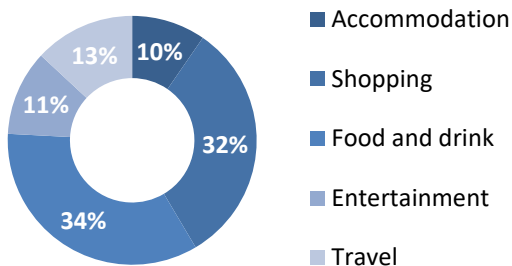
**Trips by type of accommodation**



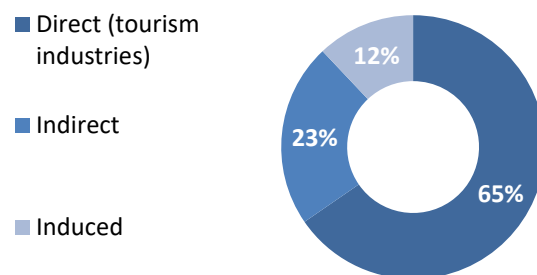
**Trips by Purpose**



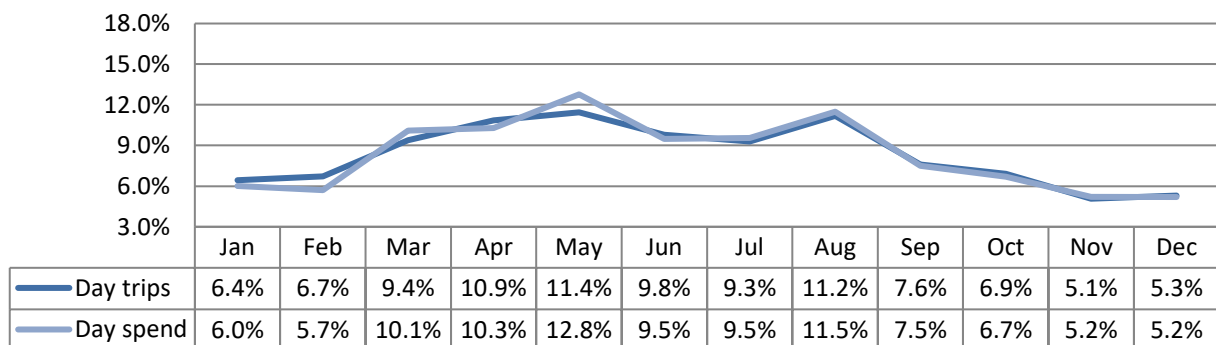
**Breakdown of expenditure**



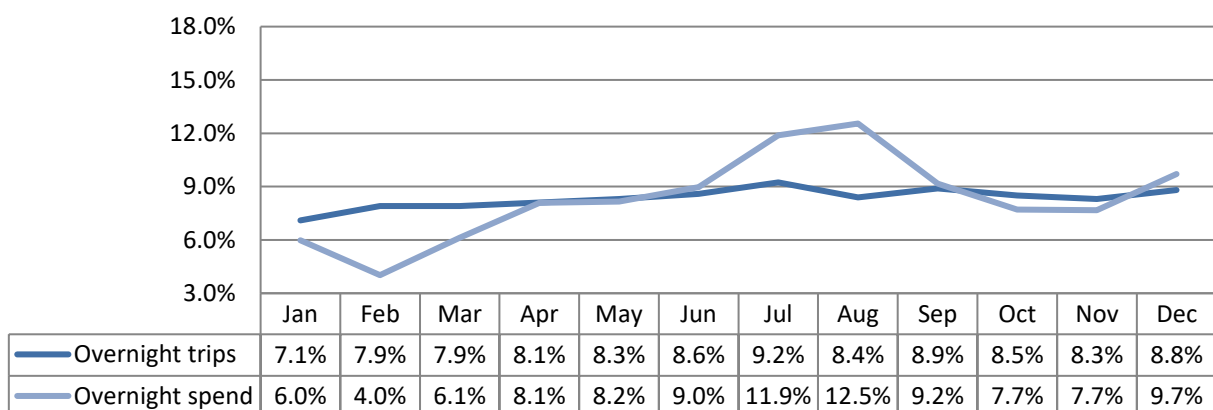
**Type of employment**



**Seasonality - Day visitors (County level)**



**Seasonality - Overnight visitors (County level)**



## Volume of Tourism

## Staying visits in the county context

## Hertfordshire - 2017 Results

### Staying trips in the county context 2017

District	Domestic trips ('000)	Overseas trips ('000)
North Herts	144	49
Stevenage	114	38
East Herts	187	63
Broxbourne	102	33
Welwyn Hatfield	151	52
St Albans	195	72
Dacorum	205	66
Three Rivers	70	27
Watford	149	51
Hertsmere	117	40
Hertfordshire	1,433	492

### Staying nights in the county context 2017

District	Domestic nights ('000)	Overseas nights ('000)
North Herts	693	325
Stevenage	528	213
East Herts	873	496
Broxbourne	498	245
Welwyn Hatfield	712	687
St Albans	849	462
Dacorum	910	422
Three Rivers	402	205
Watford	615	283
Hertsmere	551	262
Hertfordshire	6,631	3,601

### Expenditure in the county context 2017

District	Domestic spend (millions)	Overseas spend (millions)
North Herts	£28	£16
Stevenage	£26	£11
East Herts	£36	£29
Broxbourne	£18	£11
Welwyn Hatfield	£31	£36
St Albans	£40	£25
Dacorum	£44	£24
Three Rivers	£13	£8
Watford	£32	£16
Hertsmere	£23	£14
Hertfordshire	£293	£192

## Staying Visitors - Accommodation Type

## Hertfordshire - 2017 Results

### Trips by Accommodation

	UK		Overseas		Total	
Serviced	503,000	35%	156,000	32%	659,000	34%
Self catering	19,000	1%	6,000	1%	25,000	1%
Camping	20,000	1%	3,000	1%	23,000	1%
Static caravans	0	0%	0	0%	0	0%
Group/campus	23,000	2%	8,000	2%	31,000	2%
Paying guest	0	0%	11,000	2%	11,000	1%
Second homes	5,000	0%	5,000	1%	10,000	1%
Boat moorings	12,000	1%	0	0%	12,000	1%
Other	70,000	5%	67,000	14%	137,000	7%
Friends & relatives	782,000	55%	235,000	48%	1,017,000	53%
<b>Total 2017</b>	<b>1,433,000</b>		<b>492,000</b>		<b>1,925,000</b>	
<b>Comparison 2015</b>	<b>1,413,000</b>		<b>427,000</b>		<b>1,840,000</b>	
<b>Difference</b>	<b>1%</b>		<b>15%</b>		<b>5%</b>	

### Nights by Accommodation

	UK		Overseas		Total	
Serviced	1,418,000	21%	411,000	11%	1,829,000	18%
Self catering	98,000	2%	402,000	11%	500,000	5%
Camping	137,000	2%	18,000	1%	155,000	2%
Static caravans	0	0%	0	0%	0	0%
Group/campus	87,000	1%	288,000	8%	375,000	4%
Paying guest	0	0%	114,000	3%	114,000	1%
Second homes	18,000	0%	80,000	2%	98,000	1%
Boat moorings	46,000	1%	0	0%	46,000	0%
Other	356,000	6%	85,000	3%	441,000	4%
Friends & relatives	4,470,000	67%	2,203,000	61%	6,673,000	65%
<b>Total 2017</b>	<b>6,631,000</b>		<b>3,601,000</b>		<b>10,232,000</b>	
<b>Comparison 2015</b>	<b>6,608,000</b>		<b>3,575,000</b>		<b>10,183,000</b>	
<b>Difference</b>	<b>0%</b>		<b>1%</b>		<b>0%</b>	

### Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£139,964,000	48%	£48,181,000	25%	£188,145,000	39%
Self catering	£4,941,000	2%	£33,485,000	17%	£38,426,000	8%
Camping	£2,821,000	1%	£558,000	0%	£3,379,000	1%
Static caravans	£0	0%	£0	0%	£0	0%
Group/campus	£6,115,000	2%	£11,534,000	6%	£17,649,000	4%
Paying guest	£0	0%	£5,395,000	3%	£5,395,000	1%
Second homes	£1,076,000	0%	£6,697,000	4%	£7,773,000	2%
Boat moorings	£1,569,000	1%	£0	0%	£1,569,000	0%
Other	£23,818,000	8%	£2,418,000	2%	£26,236,000	5%
Friends & relatives	£112,219,000	38%	£83,340,000	43%	£195,557,000	40%
<b>Total 2017</b>	<b>£292,522,000</b>		<b>£191,607,000</b>		<b>£484,129,000</b>	
<b>Comparison 2015</b>	<b>£289,511,000</b>		<b>£198,606,000</b>		<b>£488,117,000</b>	
<b>Difference</b>	<b>1%</b>		<b>-4%</b>		<b>-1%</b>	

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

## Staying Visitors - Purpose of Trip

## Hertfordshire - 2017 Results

### Trips by Purpose

	UK		Overseas		Total	
Holiday	510,000	36%	114,000	23%	624,000	32%
Business	290,000	20%	100,000	20%	390,000	20%
Friends & relatives	588,000	41%	254,000	52%	842,000	44%
Other	45,000	3%	14,000	3%	59,000	3%
Study	0	0%	9,000	2%	9,000	0%
<b>Total 2017</b>	<b>1,433,000</b>		<b>492,000</b>		<b>1,925,000</b>	
<b>Comparison 2015</b>	<b>1,413,000</b>		<b>427,000</b>		<b>1,840,000</b>	
<b>Difference</b>	<b>1%</b>		<b>15%</b>		<b>5%</b>	

### Nights by Purpose

	UK		Overseas		Total	
Holiday	2,213,000	33%	641,000	18%	2,854,000	28%
Business	907,000	14%	462,000	13%	1,369,000	13%
Friends & relatives	3,408,000	51%	2,084,000	58%	5,492,000	54%
Other	104,000	2%	252,000	7%	356,000	3%
Study	0	0%	162,000	4%	162,000	2%
<b>Total 2017</b>	<b>6,631,000</b>		<b>3,601,000</b>		<b>10,232,000</b>	
<b>Comparison 2015</b>	<b>6,608,000</b>		<b>3,575,000</b>		<b>10,183,000</b>	
<b>Difference</b>	<b>0%</b>		<b>1%</b>		<b>0%</b>	

### Spend by Purpose

	UK		Overseas		Total	
Holiday	£84,523,000	29%	£41,522,000	22%	£126,045,000	26%
Business	£98,180,000	34%	£53,045,000	28%	£151,225,000	31%
Friends & relatives	£103,766,000	35%	£80,962,000	42%	£184,728,000	38%
Other	£6,052,000	2%	£10,765,000	6%	£16,817,000	3%
Study	£0	0%	£5,314,000	3%	£5,314,000	1%
<b>Total 2017</b>	<b>£292,522,000</b>		<b>£191,607,000</b>		<b>£484,129,000</b>	
<b>Comparison 2015</b>	<b>£289,511,000</b>		<b>£198,606,000</b>		<b>£488,117,000</b>	
<b>Difference</b>	<b>1%</b>		<b>-4%</b>		<b>-1%</b>	

Top 10 nations by volume of Visits (000s)		Top 10 nations by volume of spend (£m)	
Irish Republic	138.3	USA	£55.3
France	125.4	Irish Republic	£50.0
USA	123.6	France	£37.2
Germany	106.9	Australia	£35.1
Netherlands	97.6	Germany	£32.0
Poland	95.5	Spain	£30.9
Spain	94.9	Italy	£28.1
Australia	69.5	Netherlands	£24.4
Italy	65.6	United Arab Emirates	£22.1
Romania	53.9	Poland	£18.2

Source: International Passenger Survey, 2015-2017

## Domestic Overnight Visitors - Purpose of Trip

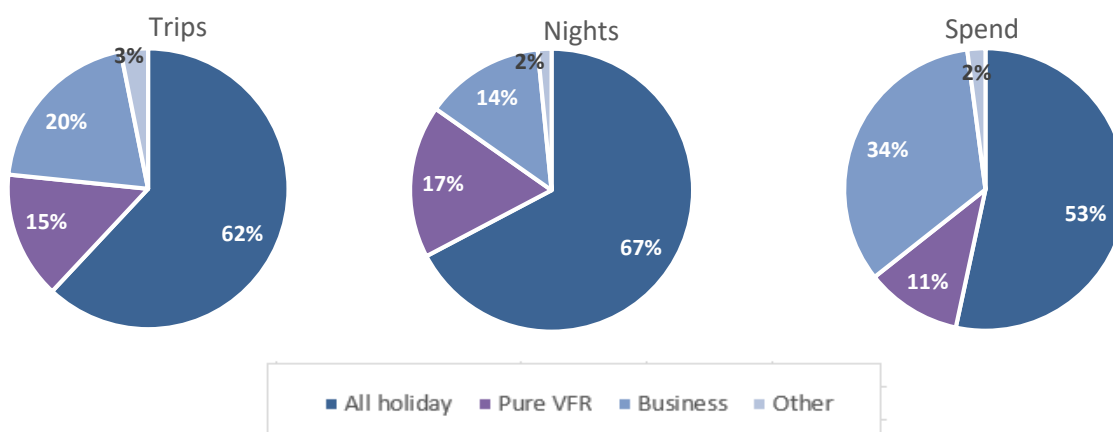
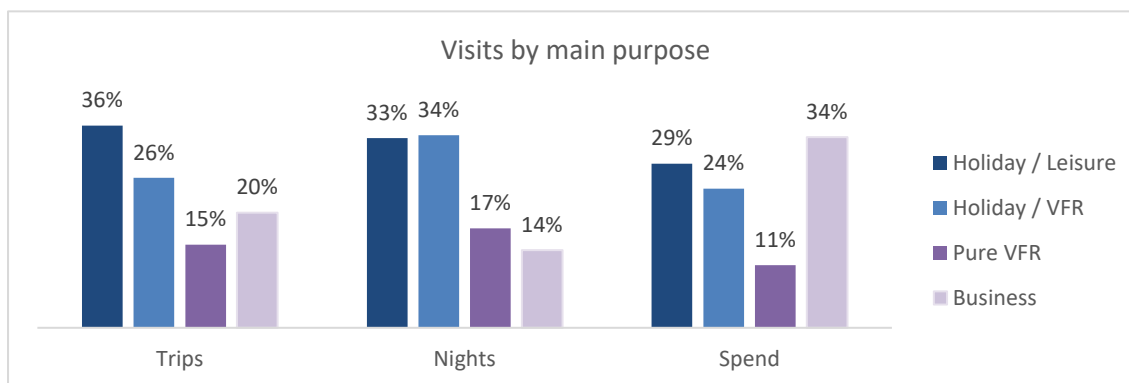
## Hertfordshire - 2017 Results

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

	Trips		Nights		Expenditure	
Holiday / Leisure	510,000	36%	2,213,000	33%	£84,523,000	29%
Holiday / VFR	378,000	26%	2,249,000	34%	£71,599,000	24%
Pure VFR	210,000	15%	1,159,000	17%	£32,167,000	11%
Business	290,000	20%	907,000	14%	£98,180,000	34%
Other	45,000	3%	104,000	2%	£6,052,000	2%
<b>Total</b>	<b>1,433,000</b>		<b>6,631,000</b>		<b>£292,522,000</b>	

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

	Holiday / Leisure	Holiday / VFR	Pure VFR	Business
Average length stay (nights x trip)	4.3	5.9	5.5	3.1
Spend x overnight trip	£165.73	£189.42	£153.18	£338.55
Spend x night	£38.19	£31.84	£27.75	£108.25



## Day Visitors

## Hertfordshire - 2017 Results

### Total Volume and Value of Day Trips

		Trips	Spend
Urban visits		19,663,000	£769,529,000
Countryside visits		6,197,000	£204,965,000
<b>Total</b>	<b>2017</b>	<b>25,860,000</b>	<b>£974,494,000</b>
<b>Comparison</b>	<b>2015</b>	<b>23,289,000</b>	<b>£926,406,000</b>
Difference		11%	5%

### Day Visitors in the county context

District	Day Visits (millions)	Day visit Spend (millions)
North Herts	2.7	£99.0
Stevenage	1.7	£59.9
East Herts	4.0	£148.0
Broxbourne	1.2	£43.1
Welwyn Hatfield	1.7	£65.2
St Albans	1.8	£66.1
Dacorum	3.2	£117.1
Three Rivers	3.2	£120.4
Watford	1.8	£65.6
Hertsmere	1.3	£46.2

## Value of Tourism

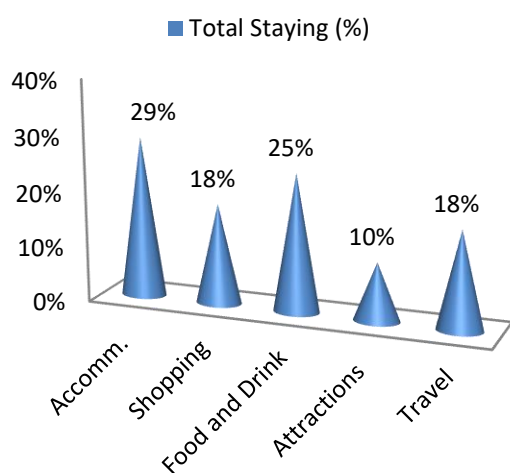
## Expenditure Associated with Trips

## Hertfordshire - 2017 Results

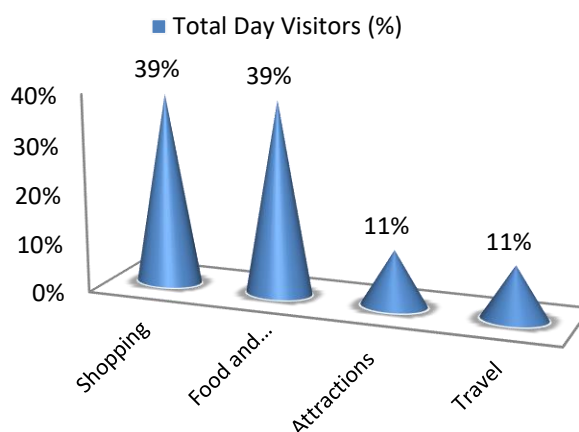
### Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£83,900,000	£35,609,000	£77,169,000	£29,800,000	£66,044,000	£292,522,000
Overseas tourists	£56,253,000	£51,823,000	£43,054,000	£20,947,000	£19,530,000	£191,607,000
<b>Total Staying</b>	<b>£140,153,000</b>	<b>£87,432,000</b>	<b>£120,223,000</b>	<b>£50,747,000</b>	<b>£85,574,000</b>	<b>£484,129,000</b>
<b>Total Staying (%)</b>	<b>29%</b>	<b>18%</b>	<b>25%</b>	<b>10%</b>	<b>18%</b>	<b>100%</b>
<b>Total Day Visitors</b>	<b>£0</b>	<b>£377,430,000</b>	<b>£380,907,000</b>	<b>£110,938,000</b>	<b>£105,219,000</b>	<b>£974,494,000</b>
<b>Total Day Visitors (%)</b>	<b>0%</b>	<b>39%</b>	<b>39%</b>	<b>11%</b>	<b>11%</b>	<b>100%</b>
<b>Total 2017</b>	<b>£140,153,000</b>	<b>£464,862,000</b>	<b>£501,130,000</b>	<b>£161,685,000</b>	<b>£190,793,000</b>	<b>£1,458,623,000</b>
<b>%</b>	<b>10%</b>	<b>32%</b>	<b>34%</b>	<b>11%</b>	<b>13%</b>	<b>100%</b>
Comparison 2015	£140,963,000	£448,561,000	£482,716,000	£158,272,000	£184,013,000	£1,414,525,000
Difference	-1%	4%	4%	2%	4%	3%

Breakdown of expenditure



Breakdown of expenditure



### Other expenditure associated with tourism activity

Other expenditure associated with tourism activity - Estimated spend				
Second homes	Boats	Static vans	Friends & relatives	Total
£1,779,000	£756,000	£0	£181,014,000	£183,549,000

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

## Hertfordshire - 2017 Results

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

	Staying Visitors	Day Visitors	Total
Accommodation	£142,558,000	£7,618,000	£150,176,000
Retail	£86,558,000	£373,656,000	£460,214,000
Catering	£116,616,000	£369,480,000	£486,096,000
Attractions	£52,824,000	£118,521,000	£171,345,000
Transport	£51,344,000	£63,131,000	£114,475,000
Non-trip spend	£183,549,000	£0	£183,549,000
<b>Total Direct 2017</b>	<b>£633,449,000</b>	<b>£932,406,000</b>	<b>£1,565,855,000</b>
<b>Comparison 2015</b>	<b>£589,001,000</b>	<b>£886,264,000</b>	<b>£1,475,265,000</b>
Difference	8%	5%	6%

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

## Supplier and Income Induced Turnover

	Staying Visitors	Day Visitors	Total
Indirect spend	£149,507,000	£259,328,000	£408,835,000
Non trip spending	£45,887,000	£0	£45,887,000
Income induced	£171,028,000	£71,687,000	£242,715,000
<b>Total 2017</b>	<b>£366,422,000</b>	<b>£331,015,000</b>	<b>£697,437,000</b>
<b>Comparison 2015</b>	<b>£341,567,000</b>	<b>£314,665,000</b>	<b>£656,232,000</b>
Difference	7%	5%	6%

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

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

	Staying Visitors	Day Visitors	Total
Direct	£633,449,000	£932,406,000	£1,565,855,000
Indirect	£366,422,000	£331,015,000	£697,437,000
<b>Total Value 2017</b>	<b>£999,871,000</b>	<b>£1,263,421,000</b>	<b>£2,263,292,000</b>
<b>Comparison 2015</b>	<b>£930,568,000</b>	<b>£1,200,929,000</b>	<b>£2,131,497,000</b>
Difference	7%	5%	6%

## Employment

## Employment

## Hertfordshire - 2017 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 Visitors		Day Visitor		Total	
Accommodation	2,047	24%	109	1%	2,157	12%
Retailing	622	7%	2,685	27%	3,308	18%
Catering	1,583	18%	5,015	50%	6,598	36%
Entertainment	824	10%	1,850	18%	2,674	14%
Transport	277	3%	341	3%	619	3%
Non-trip spend	3,220	38%	0	0%	3,220	17%
<b>Total FTE 2017</b>	<b>8,574</b>		<b>10,001</b>		<b>18,574</b>	
<b>Comparison 2015</b>	<b>7,767</b>		<b>9,512</b>		<b>17,279</b>	
<b>Difference</b>	<b>10%</b>		<b>5%</b>		<b>8%</b>	
Estimated actual jobs						
	Staying Visitors		Day Visitor		Total	
Accommodation	3,030	26%	162	1%	3,192	12%
Retailing	933	8%	4,028	27%	4,961	19%
Catering	2,374	21%	7,522	51%	9,897	38%
Entertainment	1,162	10%	2,608	18%	3,770	14%
Transport	391	3%	481	3%	872	3%
Non-trip spend	3,671	32%	0	0%	3,671	14%
<b>Total Actual 2017</b>	<b>11,562</b>		<b>14,801</b>		<b>26,363</b>	
<b>Comparison 2015</b>	<b>10,660</b>		<b>14,077</b>		<b>24,737</b>	
<b>Difference</b>	<b>8%</b>		<b>5%</b>		<b>7%</b>	

### Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	3,428	4,550	7,978
Induced jobs	3,000	1,258	4,258
<b>Total FTE 2017</b>	<b>6,428</b>	<b>5,807</b>	<b>12,236</b>
<b>Comparison 2015</b>	<b>5,992</b>	<b>5,520</b>	<b>11,513</b>
<b>Difference</b>	<b>7%</b>	<b>5%</b>	<b>6%</b>
Estimated actual jobs			
	Staying Visitors	Day Visitors	Total
Indirect jobs	3,908	5,187	9,094
Induced jobs	3,421	1,434	4,854
<b>Total Actual 2017</b>	<b>7,328</b>	<b>6,620</b>	<b>13,949</b>
<b>Comparison 2015</b>	<b>6,831</b>	<b>6,293</b>	<b>13,125</b>
<b>Difference</b>	<b>7%</b>	<b>5%</b>	<b>6%</b>

## Total Tourism Jobs

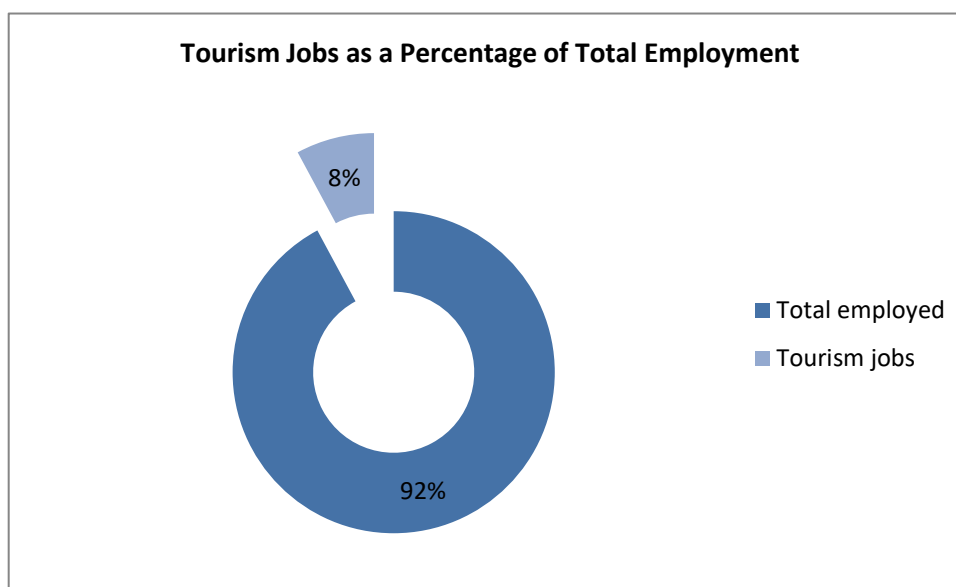
## Hertfordshire - 2017 Results

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

Full time equivalent (FTE)						
	Staying Visitors		Day Visitor		Total	
Direct	8,574	57%	10,001	63%	18,574	60%
Indirect	3,428	23%	4,550	29%	7,978	26%
Induced	3,000	20%	1,258	8%	4,258	14%
<b>Total FTE 2017</b>	<b>15,002</b>		<b>15,808</b>		<b>30,810</b>	
<b>Comparison 2015</b>	<b>13,759</b>		<b>15,032</b>		<b>28,791</b>	
<b>Difference</b>	<b>9%</b>		<b>5%</b>		<b>7%</b>	
Estimated actual jobs						
	Staying Visitors		Day Visitor		Total	
Direct	11,562	61%	14,801	69%	26,363	65%
Indirect	3,908	21%	5,187	24%	9,094	23%
Induced	3,421	18%	1,434	7%	4,854	12%
<b>Total Actual 2017</b>	<b>18,890</b>		<b>21,422</b>		<b>40,312</b>	
<b>Comparison 2015</b>	<b>17,491</b>		<b>20,371</b>		<b>37,862</b>	
<b>Difference</b>	<b>8%</b>		<b>5%</b>		<b>6%</b>	

### Tourism Jobs as a Percentage of Total Employment

	Staying Visitors	Day visitors	Total
Total employed	513,000	513,000	513,000
Tourism jobs	18,890	21,422	40,312
<b>Proportion all jobs</b>	<b>4%</b>	<b>4%</b>	<b>8%</b>
<b>Comparison 2015</b>	<b>17,491</b>	<b>20,371</b>	<b>37,862</b>
<b>Difference</b>	<b>8%</b>	<b>5%</b>	<b>6%</b>



**The key 2017 results of the Economic Impact Assessment are:**

**27.8 million trips** were undertaken in the area

**25.9 million** day trips

**1.9 million** overnight visits

**10.2 million** nights in the area as a result of overnight trips

**£1,566 million** spent by tourists during their visit to the area

**£130 million** spent on average in the local economy each month.

**£484 million** generated by overnight visits

**£974 million** generated from day trips.

**£2,263 million** spent in the local area as result of tourism, taking into account multiplier effects.

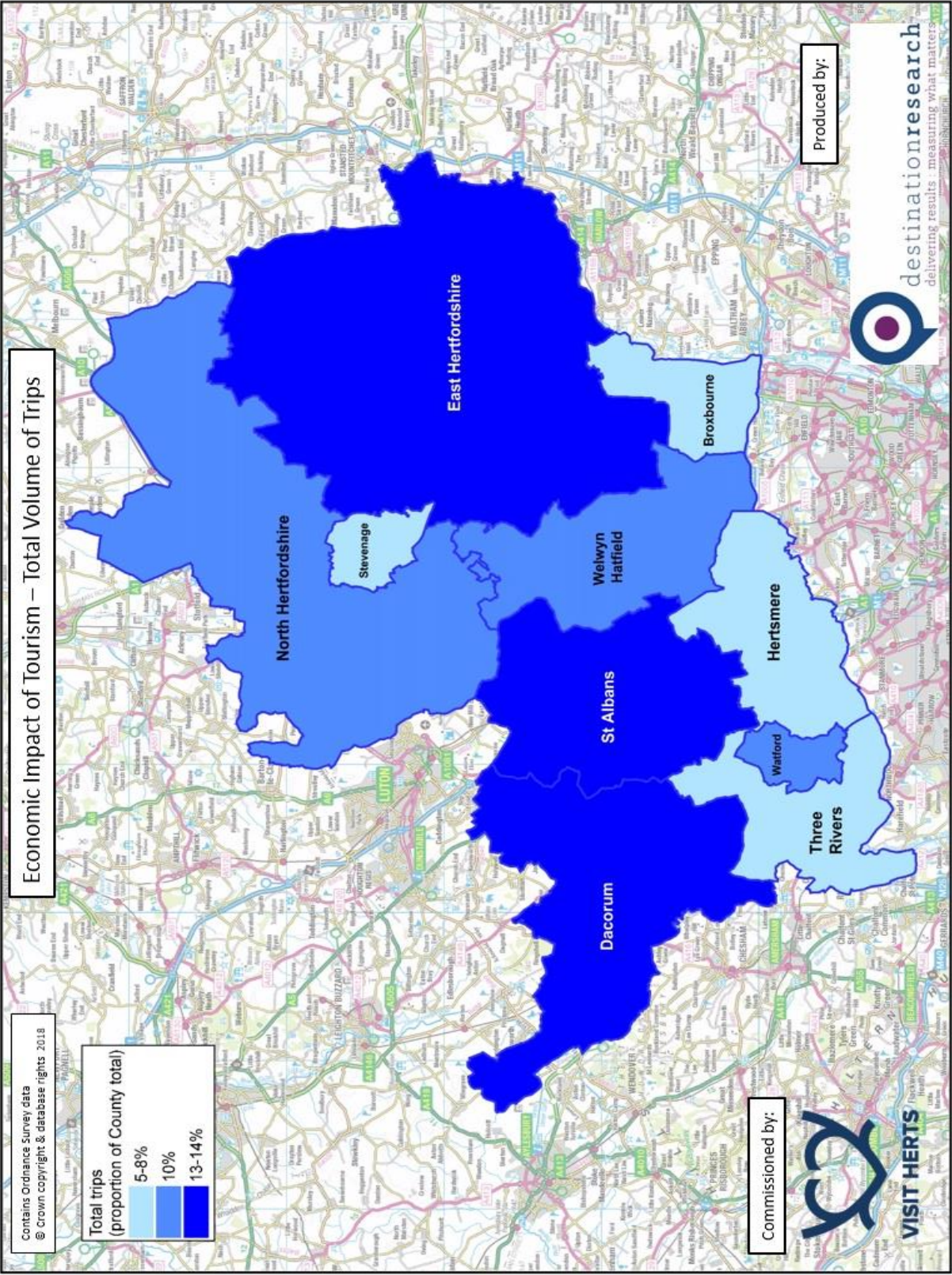
**40,312 jobs** supported, both for local residents from those living nearby.

**26,363 tourism jobs** directly supported

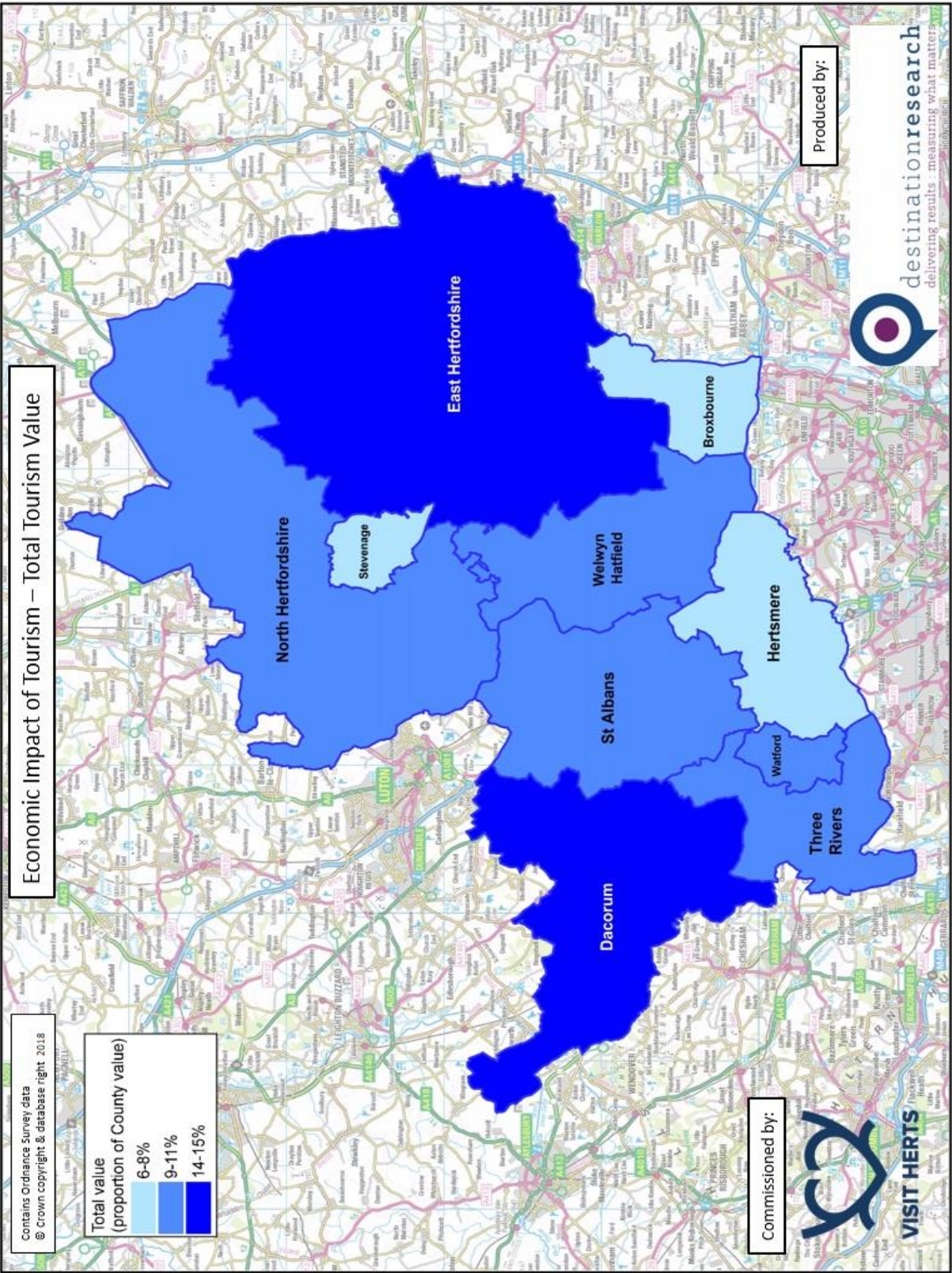
**13,949 non-tourism related jobs** supported linked to multiplier spend from tourism.

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

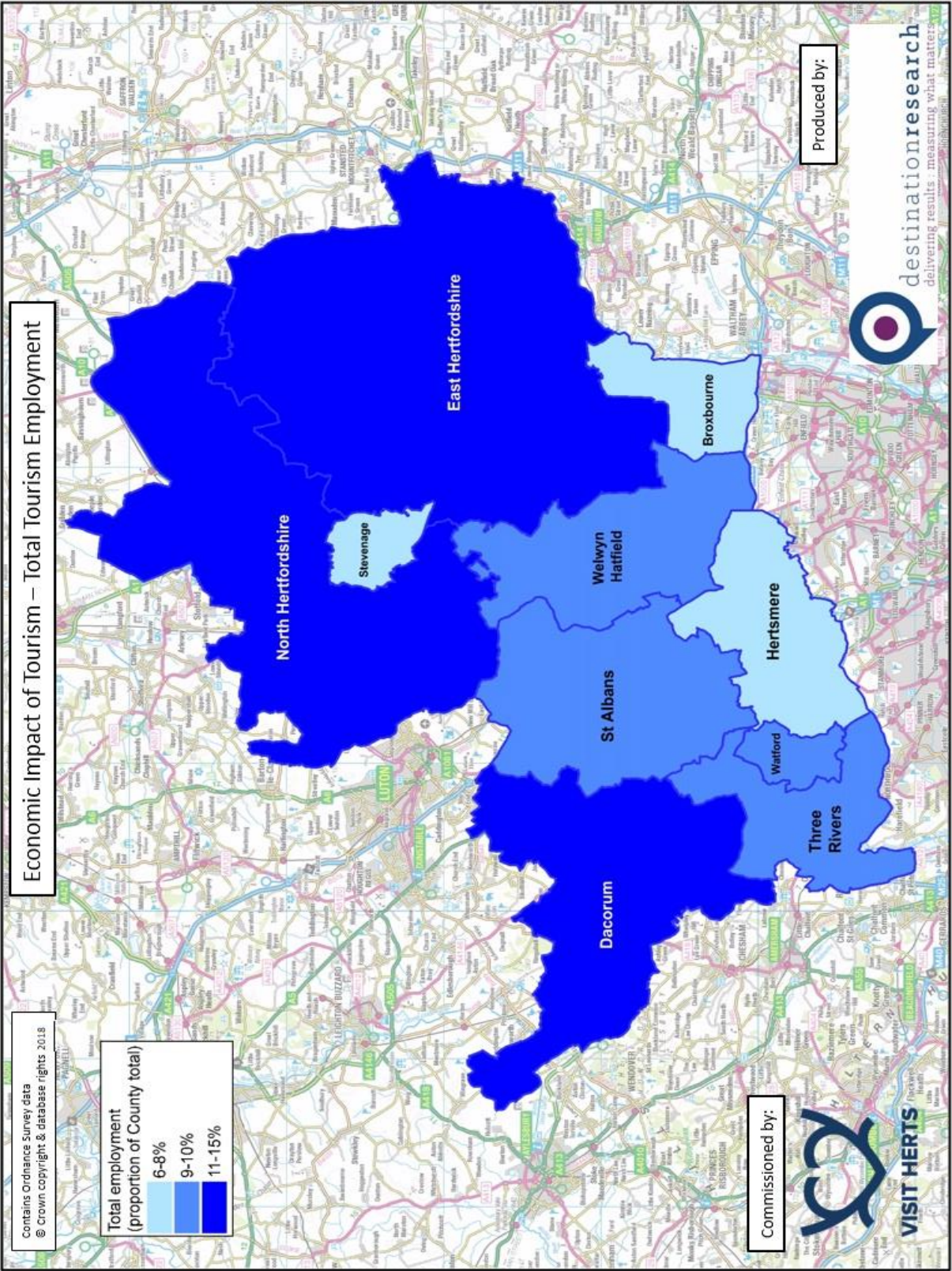
Thematic maps - Total Volume of Trips



Thematic maps - Total Tourism Value



Thematic maps - Total Tourism Employment



## **Appendix I - Introduction about Cambridge Model**

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

The model utilises information from national tourism surveys and regionally based data held by Destination Research. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level.

### **Limitations of the Model**

The methodology and accuracy of the above sources vary. The results of the model should therefore be regarded as estimates which are indicative of the scale and importance of visitor activity in the local area. It is important to note that in the national tourism surveys the sample sizes for each area 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- 2017 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.

### **Local level data for Hertfordshire EIA Reports 2017**

The Cambridge Model allows for the use of local visitor related data. Local data from visitor survey and other sources is not always sufficiently detailed or available regularly enough to make the results consistent. We rely on partners to collect additional locally source data to feed into the model. We have also used data from the Visit Herts Business Barometer.

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