



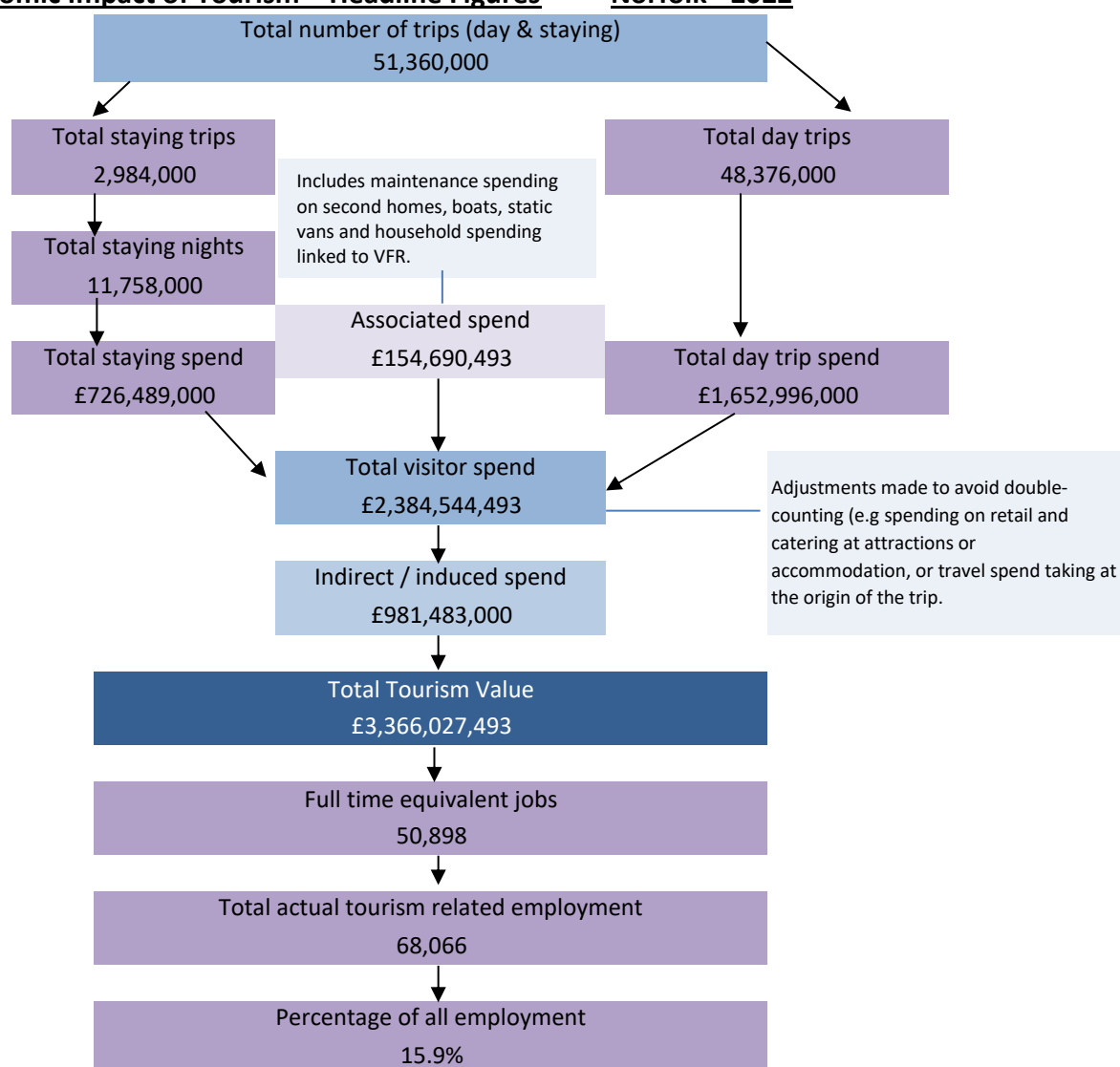
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Economic Impact of Tourism
Norfolk - 2022

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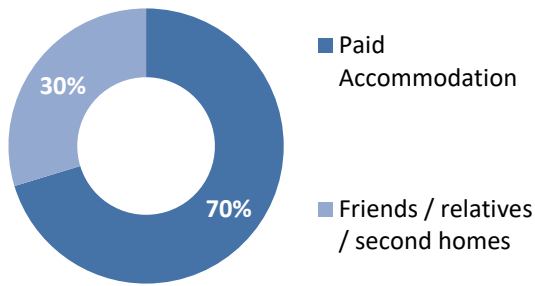
Economic Impact of Tourism – Headline Figures Norfolk - 2022



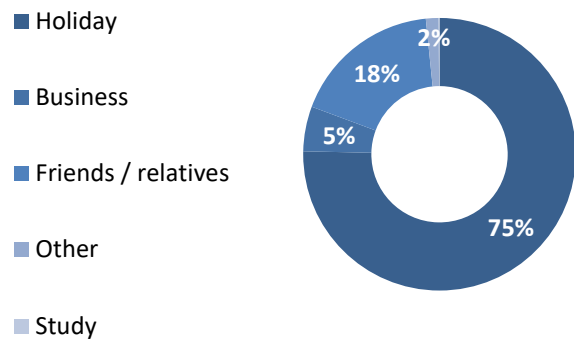
Economic Impact of Tourism – Year on year comparisons

	2022	2021	2019	Year-on-year comparison 2022 v 2021	Pre-pandemic levels 2022 v 2019
Day Trips					
Day trips Volume	48,376,000	29,625,000	48,835,000	63%	-1%
Day trips Value	£1,652,996,000	£1,073,614,000	£1,639,298,000	54%	1%
Overnight trips					
Number of overnight trips	2,984,000	2,348,000	3,164,000	27%	-6%
Number of nights	11,758,000	8,727,000	12,642,000	35%	-7%
Overnight trip value	£726,489,000	£510,004,000	£759,354,000	42%	-4%
Total Value	£3,366,027,493	£2,344,331,720	£3,423,350,428	44%	-2%
Actual Jobs	68,066	50,777	69,266	34%	-2%
	2022	2021	2019	2022 v 2021	2022 v 2019
Average length stay (nights x trip)	3.94	3.72	4.00	6.0%	-1.4%
Spend x overnight trip	£243.46	£217.21	£240.00	12.1%	1.4%
Spend x night	£61.79	£58.44	£60.07	5.7%	2.9%
Spend x day trip	£34.17	£36.24	£33.57	-5.7%	1.8%

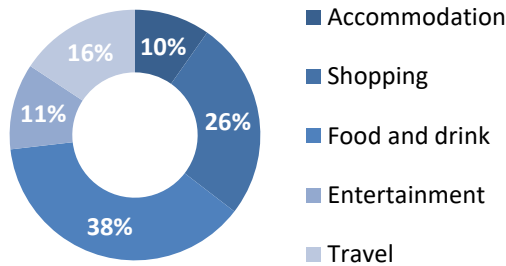
Type of Accommodation



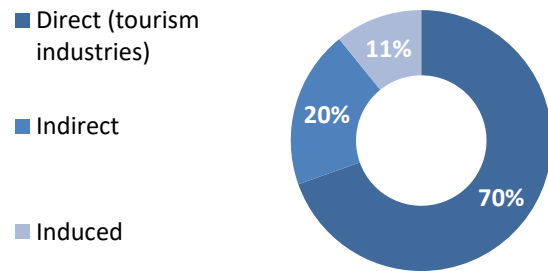
Trips by Purpose



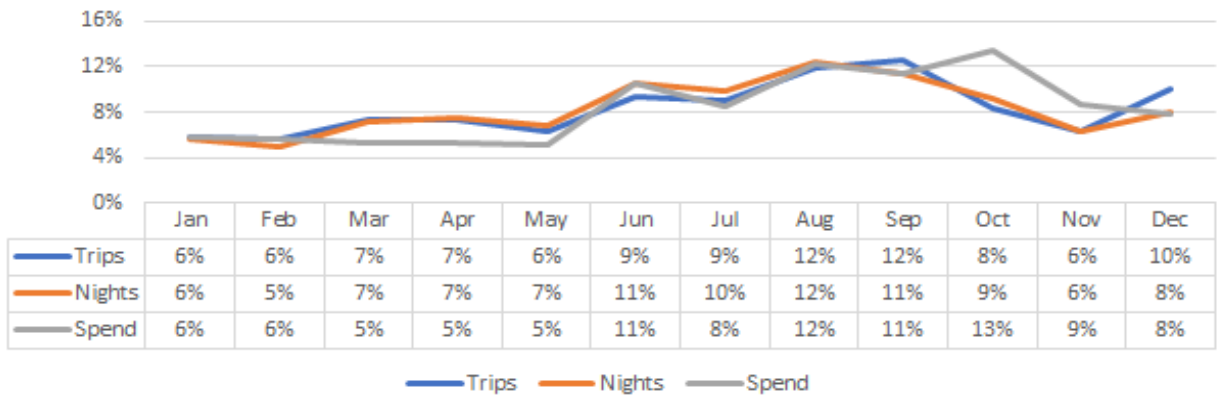
Breakdown of expenditure



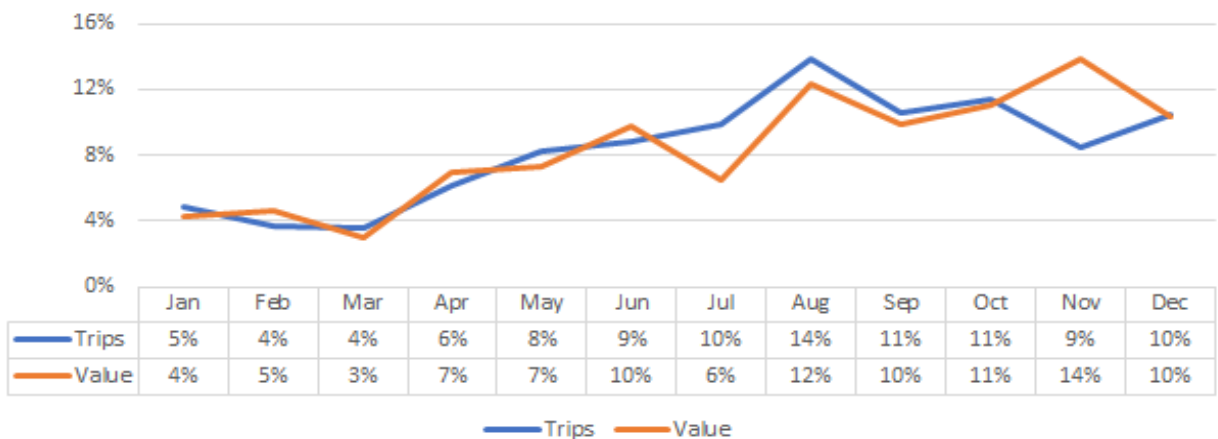
Type of employment



Domestic Overnight Trips - East of England



Tourism Day Trips - East of England



Introduction

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in 2022 and provides comparative data against the previously published data for 2021 as well as providing headline comparisons against 2019 in order to monitor the recovery from the COVID-19 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.

Results for 2022

After two years where we had very limited access to data, the 2022 results are based on the key national tourism surveys, which have recently been fully operational and upgraded.

Overall, the balance of domestic versus overseas travel is becoming closer to pre-pandemic levels, but financial pressures mean that domestic trips were preferred, so an element of staycation preference still remains. Inbound visits to the UK continued to recover to pre-pandemic levels. Overall, the 2022 results show significant improvements compared to 2021, and close to level of spending not seen since 2019.

Domestic tourism

GB Day Visits Survey (Day visits)

Overall in 2022, there were 945 million Tourism Day Visits in England with Q3 and Q4 seeing the highest volume of visits. Throughout all 12 months of 2022, visitors spent £38.7 billion. The last two quarters on 2022 accounted for the highest spend.

In the latter 9 months of 2021, British residents took a total of 545 million Tourism Day Visits within England and spent £21.19 bn on these trips. In 2022, as COVID-19 restrictions came to a halt in all nations, domestic day trips picked up 41% to reach 772 million Tourism Day Visits from April to December 2022 whilst spend was up 46% to £31.2 billion. The average spent on Tourism Day Visits to England in the last 9 months of 2021 was £39, increasing by 4% in 2022 to £40.

East of England registered 110 million tourism day trips made by British residents between January to December 2022. These trips accounted for a total of £3.42 billion in spend.

The East of England as a destination shows an increase in both volume and value in the latter 9 months of 2022 vs 2021. The volume of trips increased by 60% and the total spend by 60%.

GB Tourism Survey (Overnight visits)

England registered 107 million overnight trips made by British residents between January to December 2022. These trips accounted for a total of 316 million nights and contributed a total of £27.6 billion in spend.

In 2022, overnight trips in England had an average length of 3.0 nights with an average spend per trip £258 and average spend per night £87.

England as a destination shows an increase in both volume and value in the latter 9 months of 2022 vs 2021. The volume of trips increased by 16% and the total spend by 36%.

The East of England registered 10.4 million overnight trips made by British residents between January to December 2022. These trips accounted for a total of 31.4 million nights and contributed a total of £2.32 billion in spend.

The East of England as a destination shows an increase in both volume and value in the latter 9 months of 2022 vs 2021. The volume of trips increased by 21% and the total spend by 50%.

Overseas tourism

Visits to England

Inbound visits to England continued to recover to pre-pandemic levels (i.e. 2019), following two years of extremely low visits due to the impact of COVID-19. England hosted a little over 29.3 million international visits in 2022, 24% fewer than in 2019. Visitors spent £22.6 billion in the region in 2022, 9% below the record spend set in 2019.

East of England

The East of England hosted a little over 2 million international visits in 2022, 10% fewer than in 2019. Visitors spent a touch over £1 billion in the region, on par with 2019 results (just 1% below).

Comparability

The domestic tourism statistics are based on a new combined online survey that replaces the separate Great Britain Tourism Survey and Great Britain Day Visits Survey that ran until 2019.

From 2021 definition and survey methodology changes have been introduced meaning that results published for April 2021 onwards are not directly comparable with data published for 2019 and previous years. In order to gain as complete a picture of domestic tourism as possible, we have used data from a number of different information sources including:

Visits to Visitor attractions

An audit of English visitor attractions, recording visitor numbers since 2000.

England - Admissions volume	2019	2020	2021	2022
Number of visits (million)	257.52	90.13	117.17	166.52
% difference from 2019 visit volume		-65%	-55%	-35%
East of England				
% difference from 2019 visit volume		-40%	-23%	-8%

Accommodation Occupancy

Every month, the England Occupancy Survey (EOS) measures bedroom and bedspace occupancy across the serviced accommodation sector, including mostly hotels, with a very small proportion of serviced apartments and larger B&Bs/guesthouses.

Accommodation Occupancy - Room Occupancy - England		
Year	Average annual room occupancy	Difference from 2019
2019	77.70%	
2021	51.50%	-26.20%
2022	73.40%	-4.30%

Volume of Tourism

Staying Visitors - Accommodation Type

Trips by Accommodation

	UK		Overseas		Total	
Serviced	703,000	25%	36,000	21%	739,000	25%
Self catering	288,000	10%	9,000	5%	297,000	10%
Camping	302,000	11%	5,000	3%	307,000	10%
Static caravans	482,000	17%	2,000	1%	484,000	16%
Group/campus	47,000	2%	4,000	2%	51,000	2%
Paying guest	0	0%	4,000	2%	4,000	0%
Second homes	59,000	2%	2,000	1%	61,000	2%
Boat moorings	51,000	2%	0	0%	51,000	2%
Other	148,000	5%	9,000	5%	157,000	5%
Friends & relatives	735,000	26%	97,000	58%	832,000	28%
Total	2022	2,816,000	168,000		2,984,000	
Comparison	2021	2,292,000	56,000		2,348,000	
Difference		23%	200%		27%	

Nights by Accommodation

	UK		Overseas		Total	
Serviced	1,928,000	18%	106,000	13%	2,034,000	17%
Self catering	967,000	9%	131,000	16%	1,098,000	9%
Camping	1,404,000	13%	16,000	2%	1,420,000	12%
Static caravans	2,558,000	23%	5,000	1%	2,563,000	22%
Group/campus	129,000	1%	53,000	6%	182,000	2%
Paying guest	0	0%	26,000	3%	26,000	0%
Second homes	264,000	2%	10,000	1%	274,000	2%
Boat moorings	218,000	2%	0	0%	218,000	2%
Other	982,000	9%	14,000	2%	996,000	8%
Friends & relatives	2,467,000	23%	482,000	57%	2,949,000	25%
Total	2022	10,915,000	843,000		11,758,000	
Comparison	2021	8,355,000	372,000		8,727,000	
Difference		31%	127%		35%	

Spend by Accommodation Type

	UK		Overseas		Total	
Serviced	£216,629,000	31%	£7,308,000	20%	£223,937,000	31%
Self catering	£71,896,000	10%	£6,256,000	17%	£78,152,000	11%
Camping	£111,261,000	16%	£585,000	2%	£111,846,000	15%
Static caravans	£123,594,000	18%	£382,000	1%	£123,976,000	17%
Group/campus	£8,898,000	1%	£2,289,000	6%	£11,187,000	2%
Paying guest	£0	0%	£1,310,000	4%	£1,310,000	0%
Second homes	£6,556,000	1%	£702,000	2%	£7,258,000	1%
Boat moorings	£15,350,000	2%	£0	0%	£15,350,000	2%
Other	£61,865,000	9%	£668,000	2%	£62,533,000	9%
Friends & relatives	£74,031,000	11%	£16,909,000	46%	£90,940,000	13%
Total	2022	£690,080,000	£36,409,000		£726,489,000	
Comparison	2021	£488,689,000	£21,315,000		£510,004,000	
Difference		41%	71%		42%	

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	2,183,000	78%	66,000	39%	2,249,000	75%
Business	149,000	5%	10,000	6%	159,000	5%
Friends & relatives	448,000	16%	81,000	48%	529,000	18%
Other	36,000	1%	9,000	5%	45,000	2%
Study	0	0%	3,000	2%	3,000	0%
Total	2022	2,816,000	168,000		2,984,000	
Comparison	2021	2,292,000	56,000		2,348,000	
Difference		23%	200%		27%	

Nights by Purpose

	UK		Overseas		Total	
Holiday	8,581,000	79%	258,000	31%	8,839,000	75%
Business	467,000	4%	34,000	4%	501,000	4%
Friends & relatives	1,763,000	16%	450,000	53%	2,213,000	19%
Other	104,000	1%	38,000	5%	142,000	1%
Study	0	0%	62,000	7%	62,000	1%
Total	2022	10,915,000	843,000		11,758,000	
Comparison	2021	8,355,000	372,000		8,727,000	
Difference		31%	127%		35%	

Spend by Purpose

	UK		Overseas		Total	
Holiday	£563,737,000	82%	£17,430,000	48%	£581,167,000	80%
Business	£45,776,000	7%	£1,505,000	4%	£47,281,000	7%
Friends & relatives	£69,405,000	10%	£14,573,000	40%	£83,978,000	12%
Other	£11,162,000	2%	£1,511,000	4%	£12,673,000	2%
Study	£0	0%	£1,391,000	4%	£1,391,000	0%
Total	2022	£690,080,000	£36,409,000		£726,489,000	
Comparison	2021	£488,689,000	£21,315,000		£510,004,000	
Difference		41%	71%		42%	

Day Visitors

Trips and Spend by Urban, Rural and Coastal Area

	Trips		Spend	
Urban visits	29,172,000		£1,075,560,000	
Countryside visits	11,858,000		£360,711,000	
Coastal visits	7,346,000		£216,725,000	
Total	2022	48,376,000	£1,652,996,000	
Comparison	2021	29,625,000	£1,073,614,000	
Difference		63%	54%	

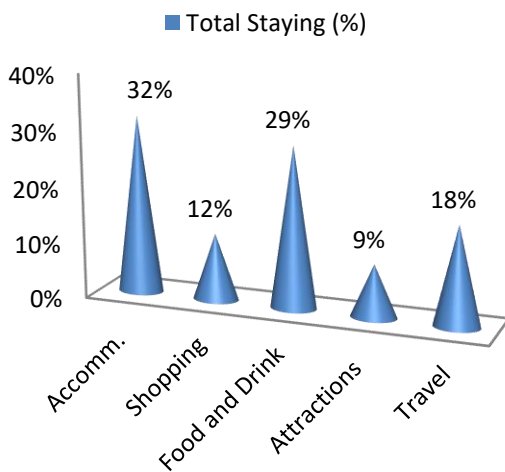
Value of Tourism

Expenditure Associated with Trips:

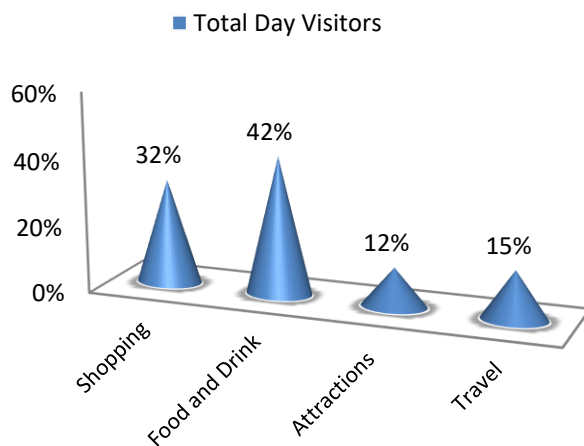
Direct Expenditure Associated with Trips

	Accomm.	Shopping	Food and Drink	Attractions	Travel	Total
UK Tourists	£222,684,000	£75,949,000	£201,330,000	£64,430,000	£125,687,000	£690,080,000
Overseas tourists	£9,582,000	£10,772,000	£8,449,000	£3,931,000	£3,675,000	£36,409,000
Total Staying	£232,266,000	£86,721,000	£209,779,000	£68,361,000	£129,362,000	£726,489,000
Total Staying (%)	32%	12%	29%	9%	18%	100%
Total Day Visitors	£0	£524,039,000	£688,281,000	£195,960,000	£244,716,000	#####
Total Day Visitors	0%	32%	42%	12%	15%	100%
Total 2022	£232,266,000	£610,760,000	£898,060,000	£264,321,000	£374,078,000	£2,379,485,000
%	10%	26%	38%	11%	16%	100%
Comparison 2021	£153,684,000	£402,107,000	£597,719,000	£177,743,000	£252,365,000	£1,583,618,000
Difference	51%	52%	50%	49%	48%	50%

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
£20,064,000	£2,495,934	£18,441,559	£113,689,000	£154,690,493

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		£236,461,000	£13,766,000	£250,227,000
Retail		£85,854,000	£518,798,000	£604,652,000
Catering		£203,486,000	£667,633,000	£871,119,000
Attractions		£71,327,000	£208,083,000	£279,410,000
Transport		£77,617,000	£146,829,000	£224,446,000
Non-trip spend		£154,690,493	£0	£154,690,493
Total Direct	2022	£829,435,493	£1,555,109,000	£2,384,544,493
Comparison	2021	£636,184,720	£1,009,746,000	£1,645,930,720
Difference		30%	54%	45%

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		£224,041,000	£377,736,000	£601,777,000
Non trip spending		£30,938,000	£0	£30,938,000
Income induced		£234,257,000	£114,511,000	£348,768,000
Total	2022	£489,236,000	£492,247,000	£981,483,000
Comparison	2021	£377,188,000	£321,213,000	£698,401,000
Difference		30%	53%	41%

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		£829,435,493	£1,555,109,000	£2,384,544,493
Indirect		£489,236,000	£492,247,000	£981,483,000
Total Value	2022	£1,318,671,493	£2,047,356,000	£3,366,027,493
Comparison	2021	£1,013,372,720	£1,330,959,000	£2,344,331,720
Difference		30%	54%	44%

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	3,952	31%	230	1%	4,182	13%
Retailing	744	6%	4,494	22%	5,238	16%
Catering	3,159	25%	10,364	52%	13,523	41%
Entertainment	1,353	11%	3,948	20%	5,302	16%
Transport	558	4%	1,055	5%	1,612	5%
Non-trip spend	2,865	23%	0	0%	2,865	9%
Total FTE	2022	12,631	20,092		32,722	
Comparison	2021	10,598	14,500		25,098	
Difference		19%	39%		30%	
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Accommodation	5,849	33%	341	1%	6,190	13%
Retailing	1,116	6%	6,742	23%	7,857	17%
Catering	4,738	27%	15,546	52%	20,284	43%
Entertainment	1,908	11%	5,567	19%	7,475	16%
Transport	786	4%	1,487	5%	2,273	5%
Non-trip spend	3,266	18%	0	0%	3,266	7%
Total Actual	2022	17,663	29,682		47,346	
Comparison	2021	14,611	21,421		36,033	
Difference		21%	39%		31%	

Indirect & Induced Employment

Full time equivalent (FTE)			
	Staying Visitor	Day Visitors	Total
Indirect jobs	4,722	6,995	11,717
Induced jobs	4,338	2,121	6,459
Total FTE	2022	9,060	18,176
Comparison	2021	6,985	12,933
Difference		30%	41%

Estimated actual jobs			
	Staying Visitor	Day Visitors	Total
Indirect jobs	5,383	7,974	13,357
Induced jobs	4,945	2,417	7,363
Total Actual	2022	10,328	20,720
Comparison	2021	7,963	14,744
Difference		30%	41%

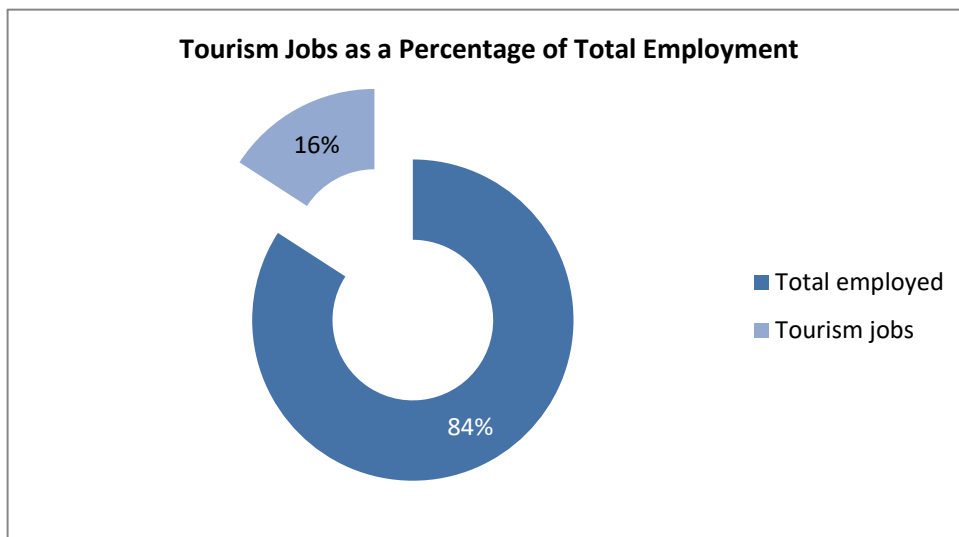
Total Jobs

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	12,631	58%	20,092	69%	32,722	64%
Indirect	4,722	22%	6,995	24%	11,717	23%
Induced	4,338	20%	2,121	7%	6,459	13%
Total FTE	2022	21,690		29,207	50,898	
Comparison	2021	17,583		20,449	38,032	
Difference		23%		43%	34%	
Estimated actual jobs						
	Staying Visitor		Day Visitor		Total	
Direct	17,663	63%	29,682	74%	47,346	70%
Indirect	5,383	19%	7,974	20%	13,357	20%
Induced	4,945	18%	2,417	6%	7,363	11%
Total Actual	2022	27,992		40,074	68,066	
Comparison	2021	22,574		28,202	50,777	
Difference		24%		42%	34%	

Tourism Jobs as a Percentage of Total Employment

	Staying Visitor	Day visitors	Total
Total employed	429,000	429,000	429,000
Tourism jobs	27,992	40,074	68,066
Proportion all jobs	7%	9%	16%
Comparison	2021	22,574	28,202
Difference	24%	42%	34%



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;
- 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 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.

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